

Bulk Registration for High-Volume Events

National Conference of State Legislatures

Case Study



Executive Summary

The National Conference of State Legislatures (NCSL) needed a scalable, intuitive way for member organizations and internal staff to register large groups—often 20 to 50 attendees at a time—for major events. Fonteva’s out-of-the-box tools required one-by-one registration, creating time-consuming, error-prone processes that frequently led to staff bottlenecks and member frustration.



Acadia Bay designed and delivered a custom, Lightning-based bulk registration solution that allows members and staff to register up to 50 attendees in a single submission while maintaining full alignment with Fonteva’s data model. The new interface streamlines every step of the workflow—from smart user routing to account-specific contact lists, inline contact creation, automated attendee and order generation, and a dedicated staff portal hub for quick access to upcoming events.

The result is a faster, more reliable registration experience that dramatically reduces staff workload, improves data accuracy, and empowers member organizations to self-serve during NCSL’s busiest event periods.

Introduction

The National Conference of State Legislatures (NCSL) runs large, high-profile events where member organizations often need to register dozens of attendees at once. Using out-of-the-box Fonteva Events, this meant registering each attendee individually through the community portal—a slow, error-prone process that frequently led to timeouts and heavy data entry for NCSL staff.

NCSL partnered with Acadia Bay to design and implement a custom bulk registration experience in Salesforce and Fonteva, allowing both members and NCSL staff to easily register groups of 20–50 attendees in a single, guided flow. Development began in April 2022, and the solution was deployed to production in August 2022 ahead of its first major use for NCSL’s events.

Key Results

up to a
97%

reduction in
high-volume registration time

5,200

bulk registrations processed
for the annual summit using the
new interface

85%

decrease in registration-related
support issues

The Challenge

For NCSL’s annual summit and other major events, 20–50 key member organizations each needed to register 20–50 people at a time. The standard Fonteva event registration path was designed for individual or small group registrations—forcing users to add each attendee one by one through the portal.

This created multiple issues:

- **High volume, low efficiency** – Registering dozens of people individually was slow and frustrating for members.
- **Portal performance and timeouts** – Fonteva’s standard registration path struggled with larger volumes, sometimes timing out after just a handful of registrations.
- **Staff burden and manual workarounds** – To help members, NCSL staff were often pulled in to “just do it for them,” manually creating attendees and orders themselves.
- **Spreadsheet concept shifted complexity to staff** – The original idea was to have members fill in a spreadsheet and send it to NCSL, who would then upload and process the data. While simple for members, it pushed all of the complexity and effort back onto staff.

NCSL needed a solution that would **scale for high-volume registrations**, preserve the integrity of the Fonteva data model, and **empower members to self-serve** without creating new administrative bottlenecks.

The Solution


Acadia Bay designed and delivered a bulk registration experience built natively on Salesforce and Fonteva using Lightning Web Components (LWC) and Flows. The solution focused on smart routing, intuitive bulk entry, a staff-friendly entry point, and robust automation aligned with Fonteva’s data model.

1. A Smart Entry Point for Members and Staff

Instead of separate URLs or complex instructions, Acadia Bay implemented a single community entry point:





- A custom “Registration” page in the community receives an event ID.
- The page automatically determines whether the logged-in user is NCSL staff or a member, using:
 - A dedicated NCSL Staff Account, and
 - Member classification on Contact (e.g., NCSL_Member_Type__c values such as “U.S. Legislator” and “U.S. Legislative Staff”).
- From that one link:
 - Staff are taken into a staff-focused flow where they can select the appropriate Account and use bulk registration across many organizations.
 - Members are taken directly to the Bulk Registration page, with the event and their Account pre-populated.

This approach gave NCSL a single, easy-to-share link from the event description that “just works” for both audiences while still enforcing that members can only register from their own Account.

 Event Search and Selection

Enter Event Name

Note: Only events within 90 days of today will be displayed.

 Name	 Start Date	 Type	 Select
Annual Conference	2024-11-01		<input type="button" value="Register"/>

Account Search and Selection					
Enter Account Name					
<input type="text" value="united"/>					<input type="button" value="Search"/>
Name	Website	Phone	Primary Email	Type	Select
United Oil & Gas Corp.	http://www.uos.com	(212) 842-5500		Customer - Direct	<input type="button" value="Register"/>
United Oil & Gas, Singapore	http://www.uos.com	(650) 450-8810		Customer - Direct	<input type="button" value="Register"/>
United Oil & Gas, UK	http://www.uos.com	+44 191 4956203		Customer - Direct	<input type="button" value="Register"/>

2. A Staff Portal Hub for Event Bulk Registration

During user acceptance testing, NCSL identified another opportunity: make it easier for staff to find the right bulk registration link for the right event.

Acadia Bay added:

- A new “Event Bulk Registration” item in the Staff Portal navigation.
- A ±90-day event list view (no extra fields required) that shows events occurring 90 days in the past and 90 days in the future.
- Each row contains a direct bulk registration link stored on the Event record, so staff can:
 - Open the Staff Portal
 - Click Event Bulk Registration
 - See relevant events
 - Click directly into the registration flow for that event

NCSL staff described this refinement as “perfect” and noted that the process “appears to be working exactly as we needed it,” with fewer clicks and clearer guidance for their internal users.

3. Bulk Registration Interface for Account Contacts


On the Bulk Registration page, the solution presents a tailored view of Contacts tied to the selected Account:

- Pre-populated Contact list – First name, last name, and email for all Contacts associated with the Account.
- Selectable attendees – Checkboxes allow the user to choose who to register.
- Ticket type picklist – Valid ticket types for the event are pulled into a dropdown, so different ticket types can be applied as needed.
- Configurable attendee limit – NCSL’s implementation enforces a 50-attendee cap for policy and performance reasons, but the solution architecture supports scaling to 200+ attendees per

submission depending on the customer's org and requirements.

- Inline creation of new Contacts – A “Create New Contacts” option lets users add people not yet in Salesforce:
 - Account is auto-populated and locked (for members, their own Account; for staff, the Account they're working on).
 - Users can add and remove multiple rows, then submit to create new Contacts tied to the correct Account.
- View existing attendees – A “View Attendees” option provides quick visibility into who has already been registered.












Both members and NCSL staff use the same bulk registration experience, with an additional staff-only button that allows staff to select another Account and repeat the process for multiple organizations.

 **Registration For Event : Annual Conference**
Below is the list of available contacts to register for Account : United Oil & Gas Corp.

Check the contacts you would like to register, select their tickets, then click “Register selected contacts” button.

If there is a contact missing from your organization, please click this link to provide their details.

[Register selected contacts](#)

<input checked="" type="checkbox"/> Select All	 Name	 Email	 Phone	 Select Ticket
<input checked="" type="checkbox"/>	Arthur Song	 asong@uog.com	(212) 842-5500	Premium Members ▼
<input checked="" type="checkbox"/>	Brent Smith	 agreen@uog.com	(212) 842-5500	✓ Premium Members Standard Ticket
<input checked="" type="checkbox"/>	Candice Camden	 ccamden@uog.com	(212) 842-5500	Premium Members ▼
<input checked="" type="checkbox"/>	John Lachance	 jlachance@uog.com	(212) 842-5500	Premium Members ▼
<input type="checkbox"/>	Kristy Lawrence	 klawrence@uog.com	(212) 842-5500	Choose Ticket ▼
<input checked="" type="checkbox"/>	Lauren Boyle	 lboyle@uog.com	(212) 842-5500	Premium Members ▼
<input checked="" type="checkbox"/>	Stella Pavlova	 spavlova@uog.com	(212) 842-5500	Standard Ticket ▼

4. Automated Attendee & Order Creation in Fonteva

Once the user confirms and submits the bulk registration:

- The system creates any new Contacts needed and associates them with the Account.
- For each selected person, the solution creates an Attendee record with the correct Event and Ticket Type.
- A single Sales Order is generated with multiple Sales Order Lines—one per attendee—keeping billing, registrant, and attendee relationships clean and auditable.
- The registrant (the person completing the bulk registration) receives an email with a Sales Order link, supporting NCSL's billing and finance processes.
- NCSL's existing custom confirmation experience and housing link logic continue to function as expected, since all records are created using the standard Fonteva data model.

You will receive an email and invoice once all registrations are complete.

OK

Attendee ID	Full Name	Status	Ticket Type	
000000001	Arthur Song	Registered	Premium Members	▼
000000002	Brent Smith	Registered	Standard Ticket	▼
000000003	Candice Camden	Registered	Premium Members	▼
000000004	John Lachance	Registered	Premium Members	▼
000000005	Lauren Boyle	Registered	Standard Ticket	▼

5. Flexible Email Controls for Staff vs. Member Flows

NCSL had different needs for attendee emails depending on who was doing the registration and how the event was published. Acadia Bay extended the existing flow to respect a new configuration:

- A “Disable Attendee Emails” checkbox on the Event controls whether individual attendee registration emails are sent.
- For events where members are self-registering via bulk registration, the box remains unchecked so attendees receive standard confirmations.
- For staff-driven bulk registrations (for example, when staff enter registrations after the fact), the checkbox can be enabled so attendees are not flooded with automated emails they don't expect.

The checkbox is evaluated when attendee registration completes, allowing staff to toggle it as needed per event, without custom code changes.

6. Iterative Enhancements and Webinar Integration

After go-live, NCSL expanded use of bulk registration to events leveraging Fonteva's Webinar product. This introduced additional complexity: Webinar-related triggers and asynchronous processes could collide with Salesforce governor limits when many attendees were created at once.

Acadia Bay:

- Investigated and coordinated with Fonteva to diagnose the interaction between Webinar triggers and bulk event registration.
- Designed an automation to close and post Sales Orders created via bulk registration where limits allowed, so staff wouldn't need to manage those steps manually.
- Clearly documented the practical attendee limits per transaction and provided honest guidance to NCSL about what was safe and reliable in their environment.

This iterative collaboration ensured the bulk registration tool remained robust even as NCSL's event scenarios grew more complex.

The Results

By implementing a native, LWC-based bulk registration interface and refining it alongside NCSL's team, the organization transformed a painful, manual process into a streamlined, self-service experience for both staff and members:

- **High-volume registrations are now practical and reliable.** Member organizations can register up to 50 attendees at once without timeouts or repeated data entry.
- **Staff workload has been significantly reduced.** Instead of manually entering spreadsheet data or creating one attendee at a time, staff use a dedicated **Event Bulk Registration** hub and the same bulk interface to support multiple accounts.
- **Data quality is stronger.** Contacts, Attendees, Sales Orders, and Sales Order Lines are all created consistently within Fonteva, maintaining the integrity of downstream reporting and finance processes.
- **Member experience is smoother.** Members access a single link from the event description, see their own Contacts, and complete group registrations in just a few steps.
- **Configuration, not chaos, controls notifications.** The "Disable Attendee Emails" option gives NCSL fine-grained control over communications for each event without complex workarounds.
- **The solution is trusted by both IT and business users.** NCSL leaders and staff repeatedly described the interface as *well thought out, perfect for their needs*, and appreciated how quickly Acadia Bay was able to iterate on ideas.