Association Event Registration Module Checklist

For association managers comparing the event-registration module inside membership or association management software.

How to use this checklist

This checklist covers one functional module within a wider membership management or association management system. Mark what your association needs, add your policy decisions, and ask shortlisted vendors to demonstrate the difficult cases using realistic member data.

Association	
Reviewer and date	
Shortlisted system	

Member groups and tiers

Check	Requirement or decision	Notes
[ ]	List every audience: individual members, student members, fellows, corporate representatives, chapters, committees, credential holders, lapsed members, non-members, guests, sponsors, exhibitors, and speakers.	
[ ]	Decide which membership tier or relationship gives access, a special price, an included seat, or priority.	
[ ]	Define how the system recognises a member who uses a different email address.	
[ ]	Decide whether a lapsed member must renew first or may book at a non-member rate.	

Eligibility rules

Check	Requirement or decision	Notes
[ ]	List restrictions based on active status, tier, grade, chapter, committee, credential, invitation, age, student status, or corporate seat.	
[ ]	Decide whether eligibility is checked at booking, on the event date, at check-in, or more than once.	

Check	Requirement or decision	Notes
[ ]	Write the explanation and next action shown when someone is not eligible.	
[ ]	Define who may approve an exception and how the reason is recorded.	

Ticket choices

Check	Requirement or decision	Notes
[ ]	Create the required member, non-member, student, guest, corporate, sponsor, exhibitor, speaker, and volunteer tickets.	
[ ]	Add early-bird, standard, late, group, table, online, in-person, and session add-on options where needed.	
[ ]	Support complimentary or free registration without sending a zero-value order through a payment gateway.	
[ ]	Decide whether a free ticket still needs an invoice, receipt, approval, code, or stated reason.	
[ ]	Define which ticket wins when someone qualifies for more than one price.	
[ ]	Avoid shared discount codes as the only way to prove member eligibility.	

Guests, groups, and capacity

Check	Requirement or decision	Notes
[ ]	Decide how many guests a member may bring and what information is required for each guest.	
[ ]	Let an authorised company contact book several named attendees where required.	
[ ]	Define substitution and transfer rules without deleting the original booking history.	
[ ]	Set capacity by event, ticket type, session, format, group, or corporate allocation.	
[ ]	Define how long an unpaid or incomplete booking holds a place.	

Waitlist, payment, and changes

Check	Requirement or decision	Notes
[ ]	Choose first-come, member-priority, tier-based, or staff-managed waitlist order.	
[ ]	Set the offer, acceptance, payment, expiry, and next-person process.	

Check	Requirement or decision	Notes
[ ]	Keep registration, payment, cancellation, transfer, refund, attendance, and no-show results separate.	
[ ]	Define full, partial, and no-refund periods, fees, and capacity release rules.	
[ ]	Record failed, pending, waived, refunded, and unmatched payments clearly.	

Attendance and member data

Check	Requirement or decision	Notes
[ ]	Record the purchaser separately from each attendee.	
[ ]	Define what counts as attendance and whether individual sessions matter.	
[ ]	Handle duplicate scans, walk-ins, manual corrections, and no-shows.	
[ ]	Return registration and attendance to the correct member record.	
[ ]	Create CPD or certificates only when the configured attendance conditions are met.	
[ ]	Report registrations, revenue, attendance, cancellations, member mix, and outstanding actions.	

Vendor demonstration notes

Next step

Use the completed checklist to write a short brief: must-have rules, acceptable workarounds, data to migrate, integrations to confirm, and three scenarios every vendor must demonstrate.