



Event Configuration Checklist for YourMembership

Use this checklist before publishing or opening registration to ensure accurate reporting, streamlined registration, and a smooth attendee experience.

1. Complete Core Event Details

- Event title and description finalized
- Correct event date/time and time zone
- Venue or virtual meeting information added
- Event category/type assigned
- Contact information verified
- Registration open/close dates confirmed

2. Verify GL Codes & Accounting Settings

- Review and update all GL codes when copying events
- Confirm revenue accounts map correctly to the current event
- Verify pricing items are tied to the correct accounting categories
- Check tax settings if applicable
- Validate refunds/cancellations process

Incorrect GL codes are one of the biggest causes of accounting cleanup and inaccurate financial reporting later.

3. Configure Registration Forms Properly

- Use pre-defined member profile fields whenever possible
- Avoid creating duplicate custom fields if profile data already exists
- Prompt members to log in before registering



Starkweather Association Services One Minute YM Newsletter

- Confirm profile auto-fill is working correctly
- Minimize manual data entry for attendees
- Add only necessary custom questions

Encouraging login improves data accuracy because registration fields automatically populate from the member profile.

4. Test Member & Non-Member Registration

- Test registration as a logged-in member
- Test registration as a guest/non-member
- Verify member pricing applies correctly
- Confirm profile information auto-populates
- Review confirmation pages for both user types

5. Validate Pricing & Registration Rules

- Member/non-member pricing confirmed
- Early bird pricing dates verified
- Promo or discount codes tested
- Capacity limits configured
- Waitlist settings reviewed
- Cancellation policy published

6. Test Payment Processing

- Payment gateway functioning properly
- Test transaction completed successfully
- Confirmation receipts generated
- Refund workflow reviewed
- Finance team notified of special payment handling if needed



Starkweather Association Services One Minute YM Newsletter

7. Configure Event Communications

- Registration confirmation email enabled
- Reminder emails scheduled
- Calendar invite included
- Speaker/vendor communications reviewed
- Post-event follow-up email prepared

8. Add Agenda, Sessions & Speakers

- Session descriptions finalized
- Speaker bios and photos uploaded
- Session times verified
- Track/session capacity limits reviewed
- Sponsor information added if applicable

9. Review Permissions & Access

- Member-only restrictions tested
- Admin/staff permissions reviewed
- Virtual links secured
- Check-in tools tested
- Mobile experience reviewed



Starkweather Association Services One Minute YM Newsletter

10. Complete Final QA Before Launch

- Test full registration workflow end-to-end – including additional registrants if applicable
- Verify all links and buttons
- Review mobile responsiveness
- Check spelling, branding, and formatting
- Confirm event visibility/searchability
- Ensure reports pull correct registration and revenue data