2025

Canadian Pony Club

HORSEREG HANDBOOK FOR PONY CLUB

Abstract

Tips and Tricks for the use of HorseReg in Branches, Centres and Regions

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1   INTRODUCTION

In 2023 the CPC started using the HorseReg system to have its members sign up and pay for regional and national membership fees.

For the 2026 season the decision was made that the CPC no longer updates its own database but will rely completely on the information stored with HorseReg.

2   HORSEREG BASICS FOR BRANCHES AND CENTRES

2.1   Sanctioning the Branch / renewing a Centre contract

At the start of the registration year each **Branch** will need to renew their status with Canadian Pony Club. This is done through a sanctioning process on HorseReg.

A link to do this will be sent to the Regions in August so Branches can start this process in September.

The sanctioning process will require the Branch to fill out the names of their Branch executive members and the plans they have for the upcoming membership year.

A step by step guide for this Branch and Centre renewal process can be found on the Canadian Pony Club website: https://www.canadianponyclub.org/documents/BranchSanctioningProcessHorsereg.pdf

Please note that the activity report that is submitted under this application does not fulfill the requirement of notifying the Region of your event details, which is needed to have your events sanctioned. Check in with your region to discuss how they would like to be informed.

Centres will go through the same link to renew their Centre for the upcoming year. Information on their renewal process is available in the same document linked above.

Once the Branch or Centre renewal application (sanctioning) has been submitted, the National office will review and a HorseReg link will be provided for your Branch or Centre.

A copy of this application will also be forwarded to the Region.

2.2   Branch or Centre landing page setup

Your club (Branch or Centre) link will navigate you to your club's dashboard. A standard landing page has been provided for each club, but you can adjust this if you would like.

To update your landing page go to Club listing and/or Configuration as indicated in the picture below.
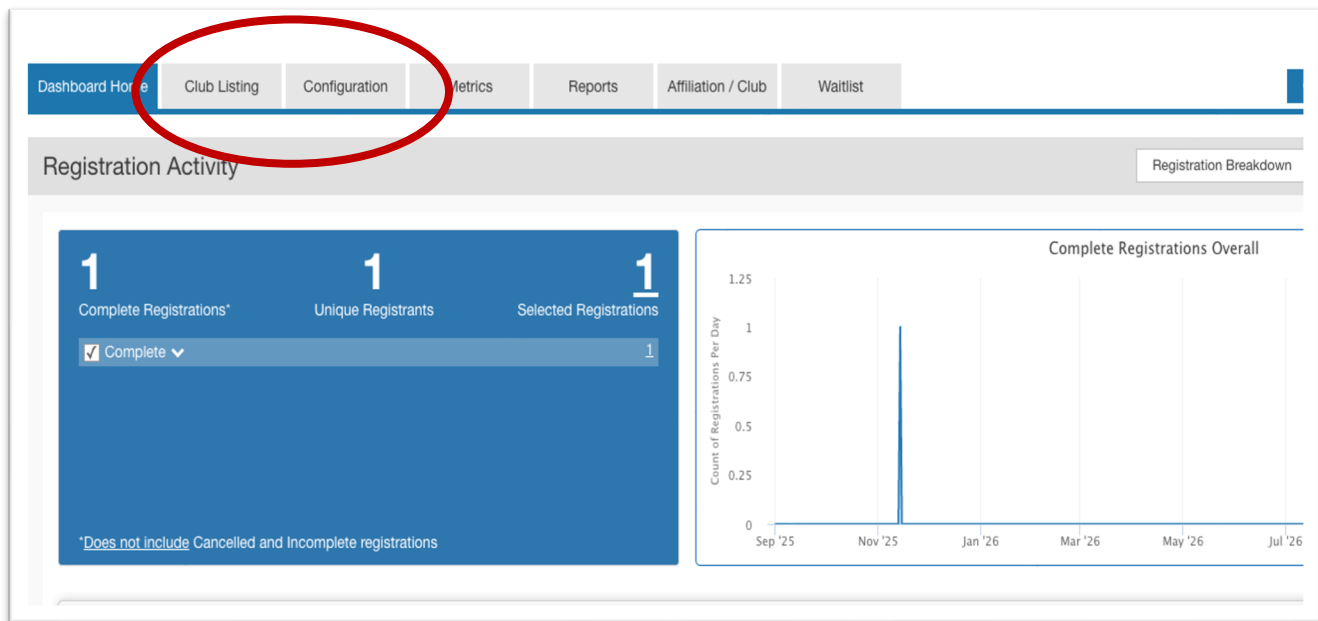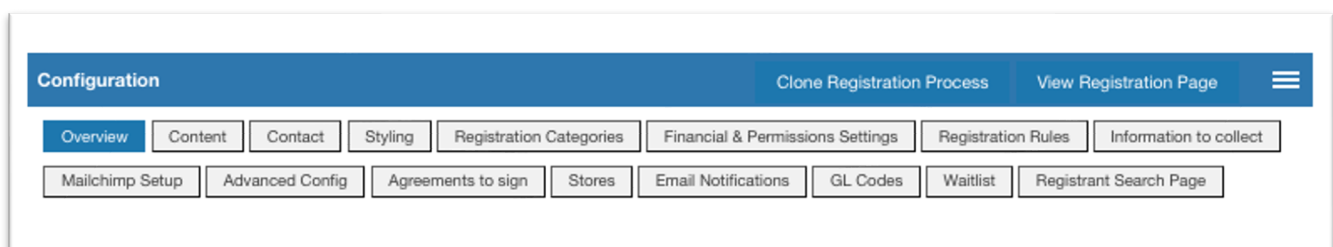
Under club listing you can update your address information and your social media links

Under configuration you can update the language and look of your landing page, permission settings and additional waivers and information to collect. More information on setup of your page can be found on the Uplifter website here: https://learn.uplifterinc.com/hc/en-us/articles/42491602818579-How-to-edit-your-registration-process-settings-Overview

Here we will discuss some items you may want to look at:

2.2.1   Overview

The overview shows you the registration and membership start and end dates. Here you will also find an option to set up a **passphrase.**

You can protect the sign up of members by adding a passphrase to your registration (optional). This will allow clubs to prevent members from signing up without contacting your club first (e.g. to make sure your program is a good fit)

Loyalty   Character   Sportsmanship

You can set up a passphrase (password) for your club under the Overview tab.

Tick the box under " passphrase enabled " and enter a passphrase (password) that is needed to be able to sign up with your Branch or Centre

2.2.2   Content

Here you can update the language on your landing page and the message in your conformation email. There are options to edit all this information.

If you only have to change some wording, this is easy to accomplish. If you would like to do a larger overhaul of the registration page, it would be good to involve someone that has some knowledge around HTML to be able to set up your page with the layout you would prefer.

2.2.3   Contact

To update your club's contact information

2.2.4   Styling

Here you can add your club logo and other styling, such as background colours etc., for your landing page

2.2.5   Registration categories

If you collect your club's membership fees through the HorseReg system, you will have to take a look at the registration categories.

Below is an example for a club that has set up fees for its members. Please note that in order to collect fees, you will need to setup an account with PaySafe.

If you don't collect fees through HorseReg the price is set at $0.00, and you will have to collect club fees in a different way.

Please note that you can also set a capacity limit here, so if you max out at a certain number you can indicate this here as well – click on the blue pen icon in front of the line to edit.

It is also possible to add a registration category (e.g. an unmounted program fee). How to set up an additional category is described under the chapter 4, events - as the process is the same for events and programs.

Finally, when you set fees for your program, you can also setup different prices by date (e.g. early bird pricing) or member count. You will see those options when you edit your registration categories.

2.2.6   Financial & Permission setting

Here you can add administrators to your dashboard.

Each club has an owner who is able to add process level admins to their page. They can add financial controllers and administrators.

Financial controllers can view financial reports, administrators can view and manage registrations, event details and club details.

A person can be both a financial controller and an administrator and you can add multiple people to these roles. Please be aware that they would have access to personal information, such as addresses and birth dates.

The account owner can do everything both the financial controllers and administrators can do and can edit account details and add and remove financial controllers and administrators

For changes to the account owner, you will need to contact the National office or HorseReg.

Here you can also see an overview of the charges for use of the HorseReg system, who pays the processing fees (user or organization) and whether your PaySafe account is active

2.2.7   Registration rules

Be very careful when setting up registration rules. Standard rules have already been set up stating that Branch or Centre members have to have a membership with the National and Regional Pony Club organizations. Additional rules are likely not needed.

2.2.8   Information to collect

Under this tab you can set up additional questions you may want to ask your members. For example, "are you planning on testing this year?", "do you have a prior connection to Pony Club?", "how did you learn about our club?", etc.

You can do so by creating a new form that will display the questions for the selected membership categories (for example you can have a different set of questions for youth members or Horsemasters). Further details on what this questionnaire can look like are provided under chapter 4.

2.2.9   Agreements to sign

Under this tab you can set up additional waivers to be signed by the registrants e.g. for the use of your facility or to acknowledge your club rules.

When setting up these agreements / waivers you will need to indicate what membership categories these agreements are for and whether they are mandatory to sign before registrants are accepted.

2.2.10 Other configuration tabs

There are more configuration tabs, that you will likely use less frequent. Under stores you can setup options to sell merchandize. Under waitlist you can setup options to have registrants put on a waitlist when your program is full or when the registration period has lapsed. You can invite these registrants to join if space opens up in your program.

2.3 Receiving payments

You can setup the Horsereg system to receive your Branch membership fees. To enable this, you will need to set up an account with PaySafe. For more information on how to do this, please consult the uplifter site here: https://learn.uplifterinc.com/hc/en-us/articles/42491438493203-Create-a-Paysafe-Account

Costs for using payments through the Horsereg system are $0.50 + 6.5% per transaction. You can opt to have this transaction fee paid by the member (user) or by your Branch (organization).

2.4   Member link for signup to your Branch or Centre

When your club is set up as you want, you can "submit your registration for review under "club listing".

After the HorseReg support team checks your setup for you, your listing will be set to **"active"**

Once active, you can find the link to your club listing under 'view registration page' from your dashboard home page.

The address that shows up in your address bar or URL bar is the link your members should follow to sign up with your Branch or Centre.

Members can sign up for a membership with your Branch or Centre by following that link.
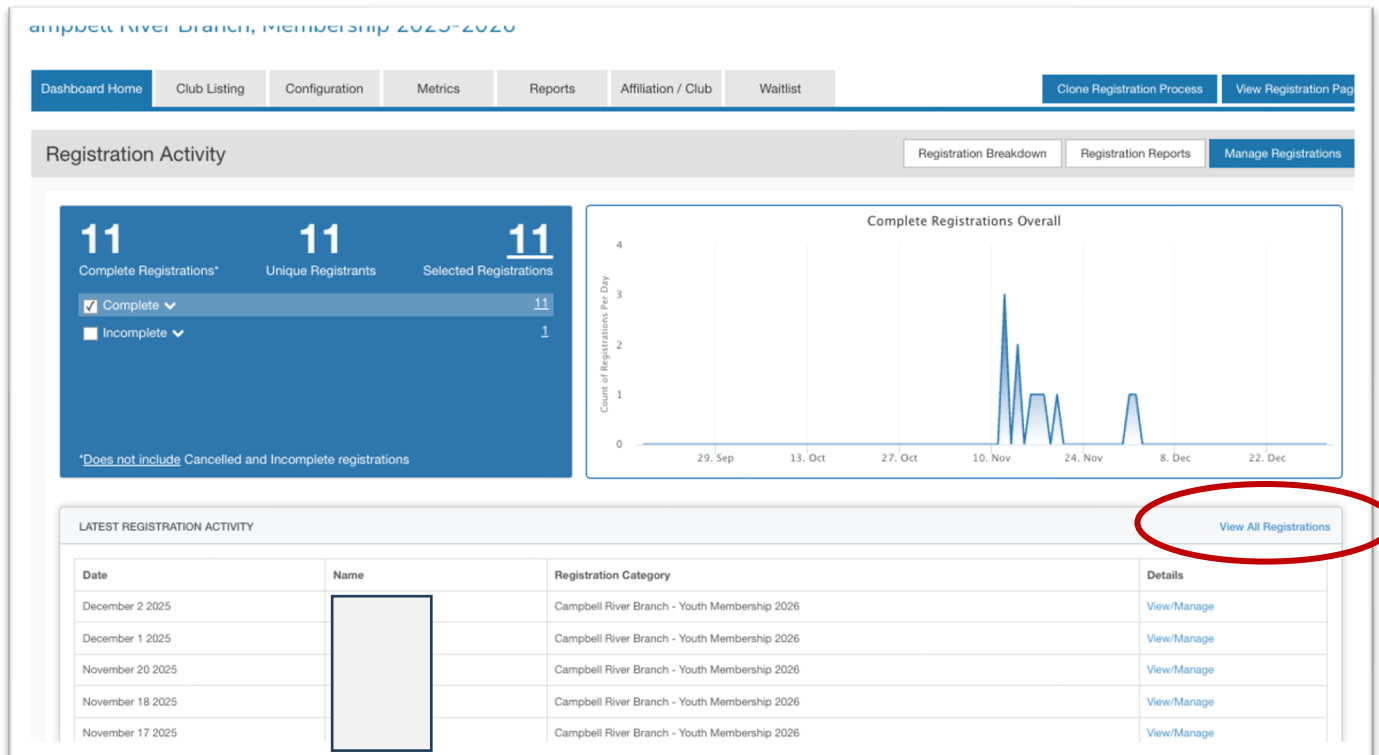
2.5   Review Member Information

Membership

Membership information is available to you through the HorseReg system, this includes name, address, phone number, guardian information, the date of joining, signed waivers and photo consent information. Testing information (levels) will be added in 2026.

You can find a list of the latest registrations on your "Dashboard Home" page. You can view details for these individual memberships from there.

To see all your members click on "View All Registrations" and you will get a list of all members that signed up for your Branch or Centre. (This includes volunteers).

This little icon ⬀ behind the name in the complete registration list will send you to their information details, which includes testing information and any other questions you as the club owner may have requested from your members.

Further information about your members is available through the Metrics, Reports and /or Affiliation/Club tabs.
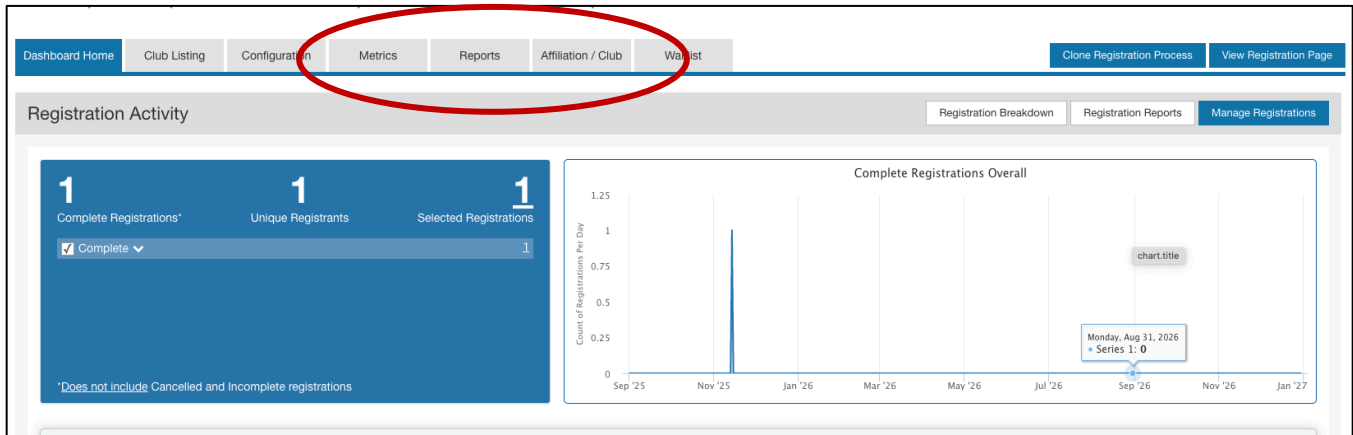
2.5.1 Metrics

Under the 'Metrics' tab your will find statistical information around age, gender and location information about your members. It also shows the number of horsemasters and youth members.

2.5.2 Reports

Under the 'Reports' tab you can generate different reports for your club.

First there is a section called 'Club Reports', which shows 2 types of reports – one with guardian information for your members and one that shows the membership status of your members with the National organization and the Region (also available under the 'Affiliation/Club' tab as will be explained in 2.5.3).

There is also an option to create a custom report which you could use to create a report with any of the additional survey questions you have added to your membership sign up process. (For some more information on how this works, refer to the 'custom reports' under 3.7)

Following there is a section called 'registration report' Most relevant here would be the **'complete w/membership info'** report, proving you with an Excel sheet or csv file containing your members with their information.

For the most up-to-date report first click 'update' followed by 'download' as soon as a report has been generated and the 'last updated' column shows the current date.

The report can be downloaded as an Excel or csv file and shows the members' information (name, address, d.o.b.) and further relevant information such as guardian information and photo consent declaration.

Finally, there is a section with 'Financial reports' which is applicable if you have members pay for their Branch memberships online through HorseReg.

2.5.3   Affiliation/Club

Under this tab you can find information around the Regional and National memberships for your members. Each member should have both a National and a Regional membership. Here you can make sure that each of your members has complied with all prerequisites to become a member.

Some members will show up with the note '*pending requirements*'. Most likely this happened because they did not provide proof of their PTSO membership for the membership year or because their PTSO membership has lapsed.

Loyalty	Character	Sportsmanship

To view what a member is missing, you can click on the red button that says: *"view missing requirements"* and a popup screen will show you all requirements that are either fulfilled or missing for the membership type. In most cases the missing requirement will be the PTSO membership validation tracking - a valid PSTO card is missing with the application.

In the example below we can see that all waivers have been signed, but that the OE membership validation (in this example for Ontario) is missing.

Notify your member that they will still need to upload this proof of PTSO membership for their membership with the CPC to be valid.

Both the regional membership chair and National office can help you in making sure valid proof of PTSO membership is provided.

NOTE on PTSO checks

On January 1st of the year another check of PTSO membership is required, as some members will apply prior to the end of the previous year with a PTSO membership that is not yet valid for the following year.

2.6 Updating your Branch Renewal (sanctioning) information

As the approval of your Branch may need to be done before you have hosted your AGM, you may need to update your Branch information after you have filled out the information as described under paragraph 2.1: Sanctioning the Branch.

To update your Branch executive information, please go to the "club listing" tab on your dashboard.

You can scroll down to the section that says "applications" . When you click 'view application details' you will be forwarded to your Branch application.

You can edit the entries you have made for your Branch committee and other details.

Please note that we don't automatically review these entries on a regular basis and that entries made **by JANUARY 31st** will be used for communications with the Branch.

When further changes are made after this date, please contact the national office to let them know.

2.7 Changing ownership & adding admins

As indicated before, each club has an 'owner' assigned to their account. This owner is able to assign additional managers and financial controllers to their account.

You can find this information on your Dashboard Home page, scroll down to "permissions info"

Permissions Info   [Edit Financial Account Permissions]   [Edit Process Level Only Permissions]

Financial Organization Permissions   **Process Level Only Permissions**
Owner: Allison Palmer

Here you can see who the owner is. This owner can add financial account permission and process level only permissions to people in your club.

If the ownership of the club membership page needs to be transferred, please contact the National office or HorseReg directly.

2.8   Providing your financial Branch report

Financial Branch reports are requested for the period between January 1st and December 31$^{st.}$ As Centres are their own financially independent organization, this is not requested from Centres

Uploading a copy of your Branch's financial report can be done by first navigating to your sanctioning application as described in first two steps from the section above. (i.e. go to "Club listing" followed by "View application details").

On the application screen select the tab "Post Application Submission".

This will bring you to the screen below, where you can upload an excel file with your Branch's financial report.

Make sure to click 'save' after your upload and **please make sure to do so by January 31st!**

APPLICATIONS ▸ [Campbell River Branch, Membership 2025-2026 - October 16 2025 - December 31 2026]

Application Status: [Approved   ▾]   ☐ Application Pending [Application Pending]   [Update Pending]

…ermit status changed from Waiting For Approval to Approved by **CPC Administrator** on October 28, 2025 9:31 AM. View History Log

Application Management   Application   Application Add Ons   **Post Application Submission**   Resubmission History

FINANCIAL STATEMENT   [Save]   [Cancel]

Please upload your financial statement. Not doing so by January 31st, 2026 may result in disciplinary action such as a fine of limited access to CPC programming. ONLY EXCEL FILES IS AUTORIZED *

Please see on the link below guidance on how to fill and share your financial statement
https://www.canadianponyclub.org/documents/CPCFinanceSystemGuideBook2025_FINAL.pdf

Maximum size 19.5 MB

☁ DRAG & DROP
your files here, or browse

[Save]   [Cancel]

3 HORSEREG BASICS FOR REGIONAL MEMBERSHIP CHAIRS

Canadian Pony Club accepts memberships through the online system known as HorseReg.

Each Region should assign a volunteer to become the Membership administrator in charge of the updating and monitoring the HorseReg system (membership chair).

3.1 Getting started

If you are a new membership chair for your region, let the National Office know as soon as possible. HorseReg will set you up with access to the account for your Region.

At the start of the summer (this is in June/July, to be ready to take on extended memberships starting September 1st):

1. **You will receive an email from HORSEREG**
   They will inform you that the setup for the following year is being prepared and they need you to provide the following information:
   - The Regional fees you will charge for the next year and who will pay for processing fees
   - Any additional questions or waivers / agreements you would like your regional members to sign before they can become members

   Please note that if we don't hear back from you by the start of August, the same setup as the previous year will be used.

2. **You will receive second email from HORSEREG**
   This follow-up email (around the end of August) will include the link to the setup of your membership registration page for the next year, based on this information you have provided at the start of the summer. <u>Please review all the information on your landing page.</u>

3. **Update your landing page**
   If there are changes needed to the landing page, you can make these yourself, or you can request the National CPC administrator to help you with this (membership@canadianponyclub.org). For more information see paragraph 3.3

4. **Review the Branch and Centre information**
   Make sure to let us know if there are any changes in the Branches and Centres that are active in your region.

   On your dashboard, under the heading "clubs" you will find an overview of all Branches and Centres known in your region.

Branches and Centres (clubs) will go through an application process – directly with the National Office (as described in chapter 2). If there are any concerns with your clubs and we should not automatically renew a certain club, this would be the time to let the National office know.

5. **Approve the setup**
   Once you have reviewed and updated your setup for the year, send an email to HORSEREG (partnersupport@uplifterinc.com) indicating you are happy with your setup, and they will activate your regional membership page.

3.2   Administrators and financial controllers

As with the clubs, each regional HorseReg account has an owner, who will be able to control the system, can add users and has all privileges both the financial controller and the administrators have.

The owner should be either the regional chair or the regional membership chair. The owner can delegate certain tasks to the financial controllers and administrators

Financial controller[1]	**Administrator**
View account financials	View, manage, edit registrations
Download financial reports	View, manage, edit membership details, event
Receive payout deposit notifications	details and club details

<table>
<tr><td colspan="2" align="center">Account owner
All of the above plus
Edit account details
Add and remove financial controllers and administrators</td></tr>
</table>

For changes to the ownership of the account you will have to contact the National Office or HorseReg directly.

3.3 Customizing your regional landing page

Go to the 'membership' dashboard and click on the tab 'configuration'.

Click on the tab: 'Primary content' to access your landing page.

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[1] The same person can be both an administrator and a financial controller.

There is an option to edit this information in the right top corner. This will open up a screen where you can adjust information for your landing page. If you only have to change some wording, this is easy to accomplish.

If you would like to do a larger overhaul of the page, it would be good to involve someone that has some knowledge around HTML to be able to set up your page with the layout you would prefer.

Further tips on updating your landing page are available under paragraph 2.2 (Branch page setup) and on the Uplifter website here: https://learn.uplifterinc.com/hc/en-us/articles/42491602818579-How-to-edit-your-registration-process-settings-Overview

3.4   Receiving Memberships

Once your membership page has been activated you will start receiving memberships through the Branches and Centres.

You will see on your dashboard's home page how many members have signed up and how many have been fully issued or have a different status.
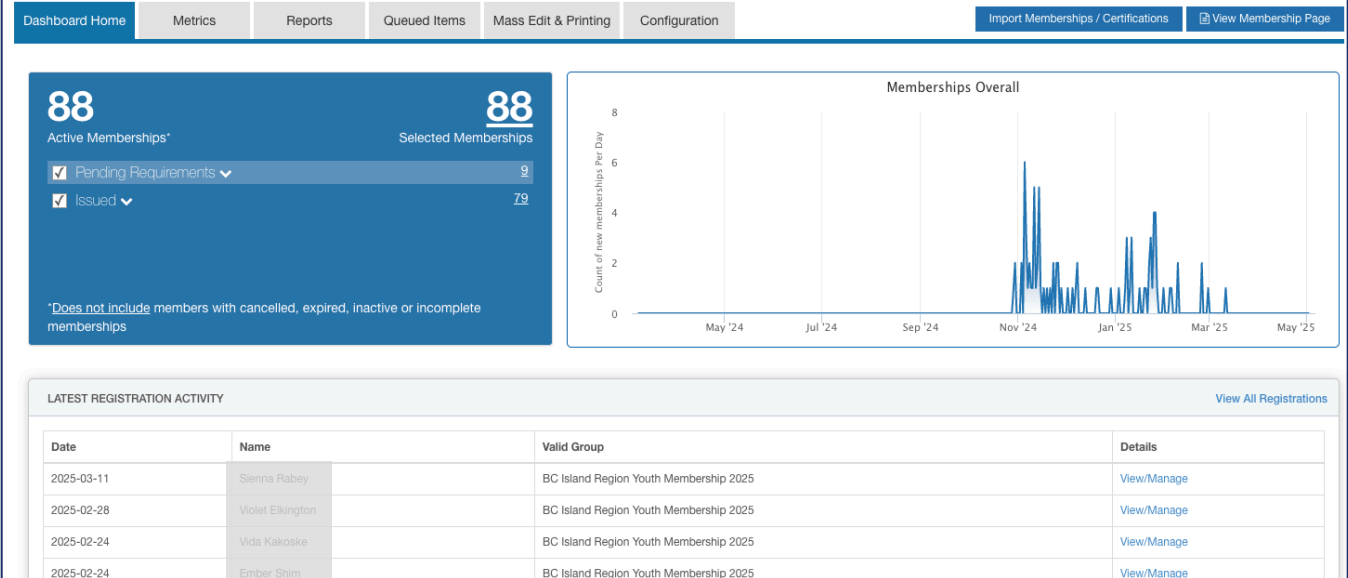
You also see a graph of when members signed up and a list of the last 10 members that signed up.

3.5   Checking Memberships - IMPORTANT STEP!

To get a more detailed overview of all the members in your region, you can click on the option 'View All Registrations'
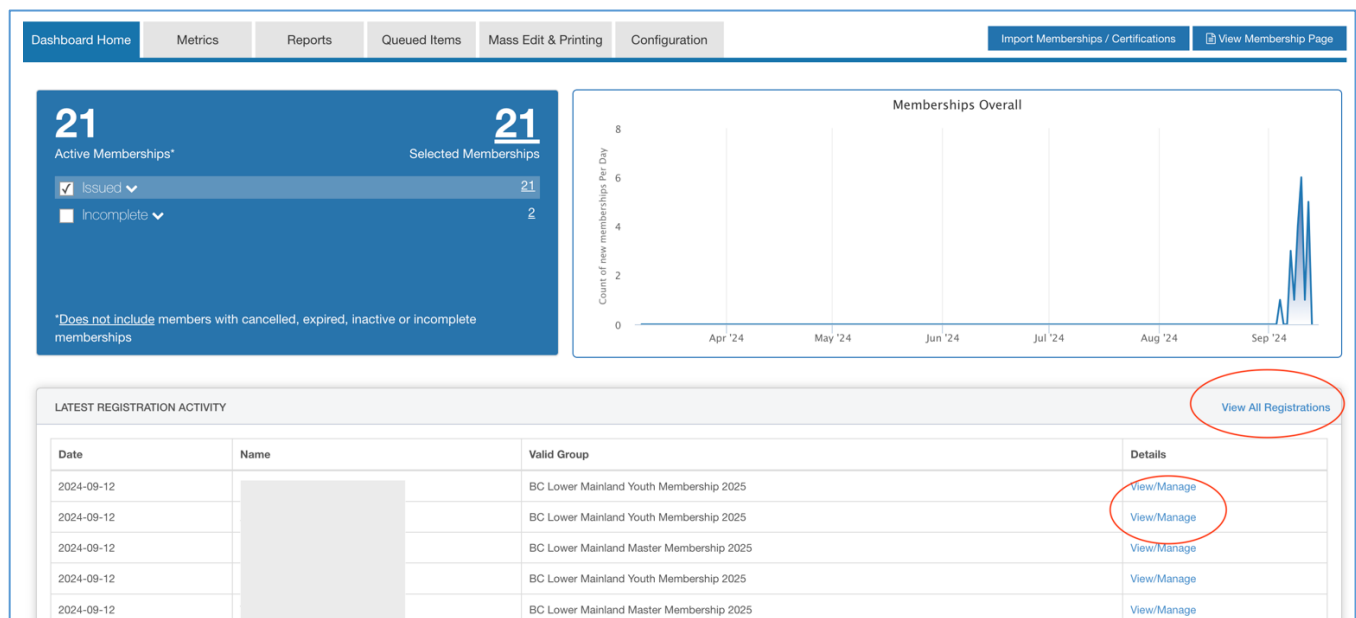
Loyalty   Character   Sportsmanship

After clicking on 'view all registrations', you will get a list of all members registered, including an indication of their status.

3.5.1   Membership status

ISSUED - <u>issued</u>: all requirements have been met, and the membership is paid for.[2]

PENDING REQUIREMENTS - <u>Pending requirements</u>: not all requirements to become a member in your region have been met.
This happens for example when no current proof of PTSO membership is uploaded or the wrong end date for PTSO membership is entered.

PROCESSING - <u>Processing</u>: membership has been paid for, but not all waivers have been signed.

INCOMPLETE - <u>Incomplete</u>: Member started the sign-up process but did not (yet) pay for the membership.

CANCELLED - <u>Cancelled</u>: Membership was cancelled by the admin.

3.5.2   Status: Pending requirements / issued

Since the CPC requires waivers to be signed and proof of a PTSO membership to be added to their membership application, the membership applications need to be checked for upload of **a valid proof of PTSO membership.**

This process <u>has only been automated in some Provinces</u> and requires the Regional Admin (membership chair) to go in and check the validity of the document that has been uploaded under the *PTSO* Membership information.

You can find this PTSO document by clicking on the 'view/manage' option for each individual member, available after you have selected 'view all registrations'.

Under the membership details you can check to see whether all membership requirements have been met, including waivers and PTSO membership.

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[2] Please note that for these members you will still need to check PTSO memberships manually

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As stated before: there is no automatic check on the type of document your applicants upload to the system, nor will the system be able to check the 'valid to' date. <u>This has to be done by the regional membership chair.</u>

Loyalty   Character   Sportsmanship

To check the uploaded PTSO[3] document:

1. Go to the "Attributes and Records" section or scroll all the way down to "Additional information" in the membership details page. Here you should find a clickable link to the document that was uploaded.

2. Click on the link to view the uploaded document and make sure it is an official membership card that is valid for the year the members signed up for.

3. If there is no valid card uploaded (member has uploaded a picture of something else, an expired card, or a blank document):

    a. scroll all the way down to Additional Information

    b. Change the date on the PTSO membership information to a date prior to the current date.

Unfortunately, you don't have the ability to completely remove the document, so this is a workaround to make sure the member gets flagged as being 'pending requirements'.

An email is sent automatically to the member stating that "the membership or certification for your regional membership no longer meets requirements". In this email is included a link to

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[3] The name of the PTSO varies by Province, in this example it is AEF (for an Alberta member).

their membership details page, where the member can see their own membership page and that there is action needed for one of their memberships. They can go in and upload a new file.

In your system these members will also be flagged as "pending requirements".

4. If the date on the PTSO membership card is not the same as the date indicated in the member profile.

   This mostly happens when members buy an extended membership and have a PTSO membership that is only valid till the end of the year (extended) but does not include the following year.

   a. Scroll all the way down to Additional Information

   b. Change the date on the PTSO membership information to the date according to the document uploaded by the member.

   c. As soon the new date passes, the member will receive an email stating that "the membership or certification for your regional membership no longer meets requirements" and will be requested to upload a new document.

   Again, in your system the member will also be flagged as "pending requirements".

NOTE: As it may not always be clear to the member that the file they had uploaded as proof of PTSO membership was invalid, you can send them an additional email explaining why they were flagged as 'pending requirements'

5. As Admin you will need to keep track of the members that have once been flagged as pending requirements, since they can upload a new document to reverse to the 'issued' status. You should however go back in and double check that a valid proof of PTSO membership has since been uploaded.

In the region of NBPEI, the Ontario Regions and Alberta Regions the PTSO memberships are acquired through the Horsereg system, and an automated check is in place for the members in these provinces. Members residing in PEI still need to be checked manually.

3.6 Metrics

Under the Metrics tab on your dashboard, you will find some statistics of you membership

- The heatmap shows where your members are located.
- The demographics section shows a breakdown of your membership according to country, province, gender, age and minor/adult ratio
- The affiliates section shows the number of members per club and from this page you can also generate an affiliated report per club, which provides you with a list of members for each club.
- The memberships section shows the membership numbers per membership type (horsemaster or youth members)

3.7   Reports

Under the reports tab we have an opportunity to download several reports. There are several sections here:

Custom reports

Under the custom report you can create customized reports for your own use. In the above example you see two reports already set up. One for the parent/guardian information for each member and one for the testing information for each member.

If you would like, you can set up additional reports by clicking on 'create custom report'

The report you create will be based on the "Memberships – All" database, so that is the option you will first have to select.

You will then be presented with a long list of column options to put in the custom list you would like to create.

One of the options that contains more than one single information item is: additional questions.

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Additional questions contain all additional information we request from each registrant and provides us with:

- Guardian information
- emergency contact information
- whether participant consents to the use of their picture for use in CPC publications,
- a link to the uploaded PTSO card and
- their EC number (if applicable)

In this example we have created a spreadsheet with the first and last name of the member, the Branch or Centre they are associated with and the additional questions.

We then have to name the report and provide a short description

This will now show up under our custom reports.

One of the columns in this report is information around **photo consent**.

The creator of the report is able to edit the report. If you want to have it deleted, you will have to contact Horsereg.

Membership reports

Several additional membership reports are standard available. Here you can for instance update and create membership lists according to the status of the members (issued, pending requirements, all).

Financial reports

Under the financial reports you can create a report showing the complete transactions and possibly refunded transactions. The complete transactions show a list of each individual payment made and the payout by the system.

The financial controller and owner have access to further financial reporting.

Product reports

These reports are available whenever you would sell products through the Horsereg.

3.8 Financial Reporting

The financial controller and account owner have access to further financial reporting information.

Under the section 'financials and accounting' you can keep track of the payments that have been made to your region.

Here you will find the following relevant information:

cashflow : an overview of debit and credits to the account and recently disbursed payouts for a selected date range

statements : a summary of accounts, balance sheet and income statement for the selected date range

transactions : an overview of every single transaction made within the selected date range

reports : here you can generate and download a variety of financial reports

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permissions : current administrators and financial controllers. Here account owners can change permissions.

financial summaries : payout summaries for each month

payouts : every individual payout made to your bank account

4   EVENT SETUP WITH HORSEREG

The HorseReg system allows for the setup of events such as testing, clinics or shows.

In that case – to receive payments - **you will have to setup a PaySafe account linked to your organizations bank account**. Note that transaction fees will be charged on these payments.

Events are normally set to be only open to members in good standing with your organization, but you can further limit the class of registrants to only horsemaster or to members under a certain age, you can set a maximum number of participants, you can set 'early bird' prices for early registrants, you can set late fees, a deadline for registration etc.

You also don't have to double check payment status and can add a waiver to be signed if applicable.

4.1   New event setup

For instructions how to set up an event, go to: https://learn.uplifterinc.com/hc/en-us/articles/42491615894931-How-to-create-a-new-registration-process

Some steps in this process are:

From the **dashboard** go to **"events & programs" and "create a new event"**
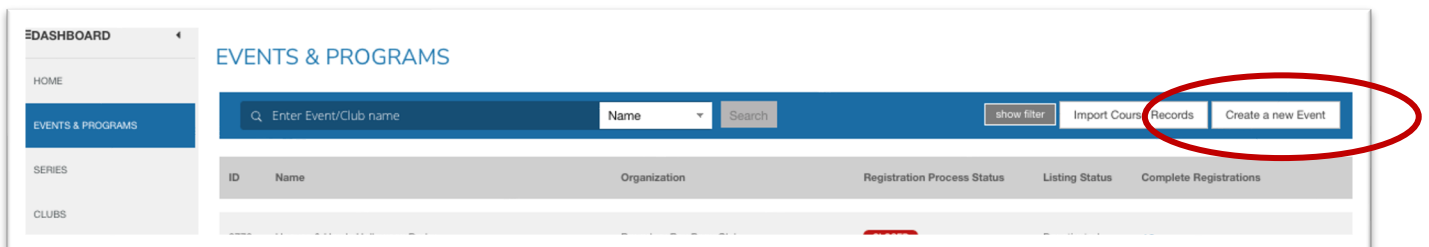
You will be forwarded to a setup wizard that will allow you to start with the basic information.

First a popup screen will request if you want this to be part of an existing organization. This can be your Region or a Branch/Centre.

You can then fill out the **listing information**, with the name of your event, start and end date, and the event location.

Next will be the **classification** (options are competition, training camp, general or clinic) and **social media** links.

You can then continue to set up your registration or get back to it at a later date (you can find the listing under "events and programs" on your dashboard)

If you opt to come back later, please follow the steps as outlined here:
https://learn.uplifterinc.com/hc/en-us/articles/42491615027347-Registration-Process-Setup-HOW-TO-SETUP-YOUR-EVENT-PROGRAM-COMPETITION-ACTIVITY

Categories and fees

Continuing the registration by clicking "setup registration" will allow you to setup **categories and fees.**

Examples of registration categories could be Horsemaster or Active member, classifications according to age or testing levels, members bringing a horse or without a horse or a distinction between

members from your region or from guests regions, etc., etc.

Category Name & Description

Name ⓘ

test1

Category Description

> B *I* U̲ S̶ ☰ ☰ ☰ ☰ ☰ </> 🖼 %
>
> Category Description

Category Main Setup

Capacity ⓘ	Display Type ⓘ	Is used for ⓘ	Registration opens:	Time (24H)	Registration closes:	Time (24H)
100	Displayed during regi ▾	Individual ▾	YYYY-MM-D 📅	⏰ -- : --	YYYY-MM-D 📅	⏰ -- : --

Restricted By Age ⓘ	Min Age	Max Age	Restricted By Gender ⓘ	Choose Registration Gender
◯ No			◯ No	Select ▾

Custom Category ID

Price Setup

Price before tax ⓘ	Category Price Name	ADD DISCOUNT ▾
50	test1 - $50.00	

Discounts - By Date

Discount Name (as will appear on transaction receipt)	Amount	Discount Type	Date From	Time From (24H)	Date To	Time To (24H)	
early bird	-10	Value ▾	2025-12-04 📅	00 : 00	2025-12-05 📅	00 : 00	🗑

Discounts - By Registration Count

Discount Name (as will appear on transaction receipt)	Amount	Discount Type	Registration Quantity From	Registration Quantity To	
		Value($) ▾			🗑

Cancel		Save and Create Another	Save

Loyalty   Character   Sportsmanship

You can set a maximum number of participants and registration dates. There are also options to set age ranges or restrictions on gender.

Further discounts can be set for participant numbers or date ranges (e.g. early bird pricing in the example above).

Next you can setup **waivers or agreements** to be signed

After that is done you will be asked what you would like to do next.

By continuing to the dashboard, you can review and test the event registration, before submitting it for review:
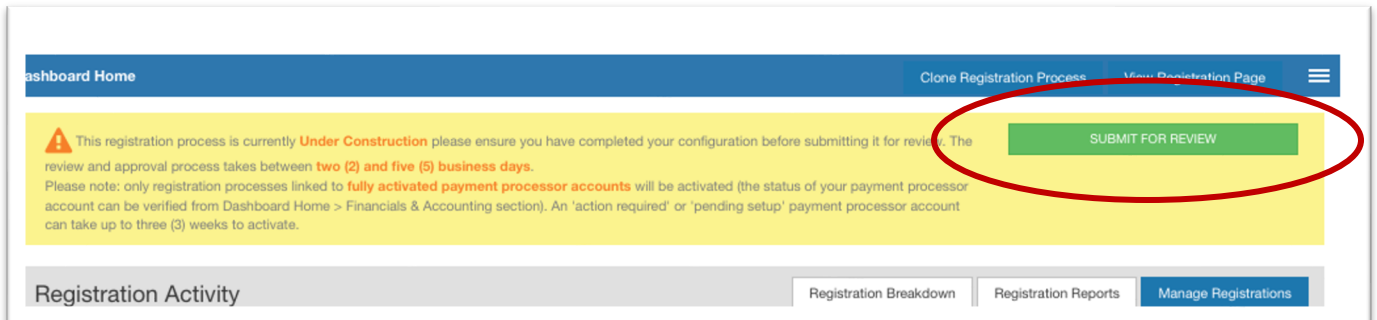
You can review what the event signup looks like under "view registration page". This will also provide you the link to your event (once reviewed and approved) in the URL-box of that webpage.
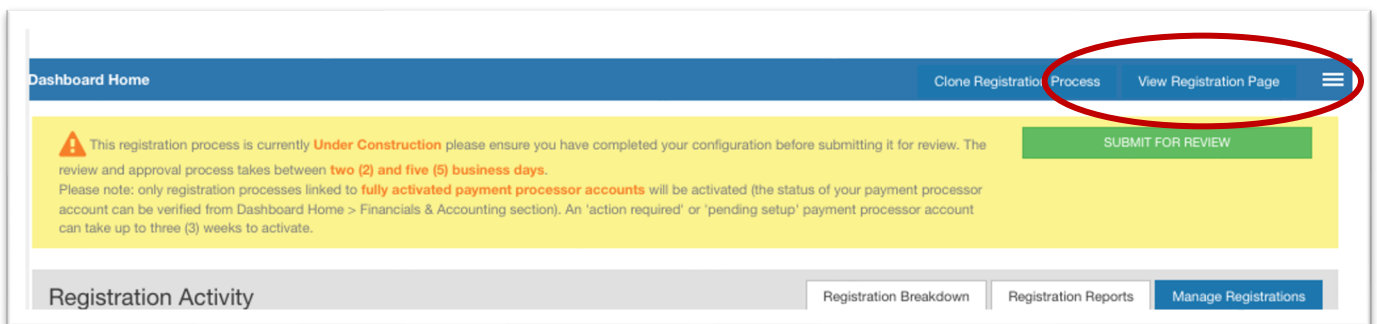
4.2   Detailing or changing your event setup
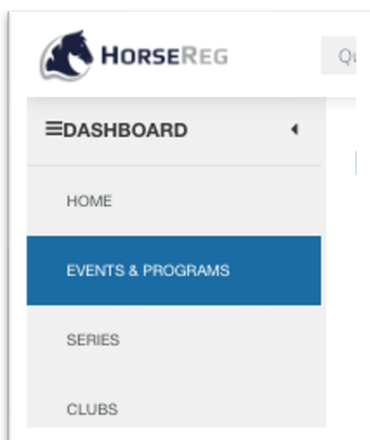
If you would like to make changes to your event setup: From you dashboard go to "events and programs" and click on the event you would like to edit.

Your Dashboard Home shows the members that have signed up for your event.

The Competition/event listing shows the listings details such as start and end date, start and end date for registration and listing categories. These can be edited there.

The Configuration tab gives you several options to change your event listing. They are similar to the setup of membership pages for the Branch or Centre, as described in paragraph 2.2

4.2.1 Configuration options

Overview

Under 'overview' you see the registration start and end dates and event start and end dates. Here you can also add a password to the event by clicking the checkbox under passphrase enabled and adding a passphrase (password)

Content, contact and styling

As with your membership landing page, you can setup the look and language of your event landing page under 'Content' and 'Styling'

Below we follow an example for the setup of a testing event in ABS.

Registration categories

Under 'registration categories' of the event you find the setup of the different categories a members can apply for, the gender and age requirements and the maximum number of participants you will accept. You can edit these when clicking the 'registration categories' tab.

Edit	Order	Name	Price	Discounts	Payment Method	Is used for	Action	Status	Open/Close date	Gender	Age	Capacity	Delete
✏	1	D Test	$50.00	-	Full (one-time)	Individual	-	OPEN	-	Not Required	7-100	10000	🗑
✏	2	D1 Test	$60.00	-	Full (one-time)	Individual	-	OPEN	-	Not Required	8-100	10000	🗑
✏	3	E-D1 Challenge	$70.00	-	Full (one-time)	Individual	-	OPEN	-	Not Required	8-100	10000	🗑
✏	4	D2 Test	$70.00	-	Full (one-time)	Individual	-	OPEN	-	Not Required	9-100	10000	🗑
✏	5	E-D2 Challenge	$90.00	-	Full (one-time)	Individual	-	OPEN	-	Not Required	9-100	10000	🗑
✏	6	C Test	$85.00	-	Full (one-time)	Individual	-	OPEN	-	Not Required	---	10000	🗑
✏	7	E-C Challenge	$115.00	-	Full (one-time)	Individual	-	OPEN	-	Not Required	---	10000	🗑

Financial & permissions settings

Under the next tab - 'financial & permissions settings' you can indicate who pays for the transaction fees (user or organization) and you can appoint organizers of the event as an administrator. They can check who has signed up for the event. Please keep in mind privacy concerns around sharing this information.

Registration rules

Under the next tab - 'registration rules' you can select what memberships must be in place before a member can sign up for the event. This could be just a National (CPC) membership, a membership with the Region, or under event/club registration a membership with the Branch or Centre.

Please be aware that you can set rules for all registrants of your event **or** rules for each individual category you have set up.

Registration Rules dictate the Provincial Membership *(and its corresponding National Membership, if applicable)* that must be owned or purchased by the registrant in order to register. Important Notes: ****Please read carefully****

- Registration rules can be applied at two levels:
  - **Registration Process Level**: The rule(s) will apply to *all* registration options. *(default view)*
  - **Registration Category Level**: Rules are set on specific registration options if their requirements differ from other registration options. *(Click "Registration rules per registration category" below)*
  - Rules set at the **Registration Category Level** will *override* rules set at the **Registration Process Level**
- It is the responsibility of the event/club administrator to ensure the correct registration rule(s) is applied to a registration category. If in doubt, please reach out to your Provincial Membership Representative for guidance.
- Membership Rules follow an "**OR**" logic where the registrant will require membership X *or* Y *or* Z in order to register. Be sure to include all applicable membership types in your rules.

Missing Required Membership Message ⓘ [Edit]

No message at the moment.
Click the Edit button on top right corner to add new message.

⦿ Registration rules for all registrations ◯ Registration rules per registration category (overrides rules for all)

All registrants of test [ADD RULE]

RULE 1: All registrants must have an event registration with **Cochrane Pony Club - 2026 memberships** [ACTIONS ⌄]

Information to collect
Additional questions are found / set under the next tab 'information to collect'.

Loyalty	Character	Sportsmanship

Here you can add that you would like participants to include further information such as date of birth, gender, nationality and address. Since we mostly deal with members that are already in the system, these field would be prefilled at sign up. You can make the attributes optional or required.

You can add further specific questions by 'creating a form' (still under the "information to collect" tab).

These can be created for all registrants or for certain categories only. (e.g. if adults would be asked to upload proof of a clear criminal record check) .

Click "create a new form" and give the form a name. You can specify whether it is valid for all categories, or for one specific category. The checkbox with the number one indicates the questions are posed for all categories, if you click one of the checkboxes under the grey bar (indicated with number 2 – in this case there is only one option there) the questions are asked when signing up for that particular category only.

Below is an example of the question form for testing in ABS.

There are different types of questions you can setup such as:

Drop down menu

Loyalty	Character	Sportsmanship

Short Answer

File upload

Oher question types are *long answer, checkbox and calendar (date picker).*

More information on setting up questions different types of questinos can be found here:

https://learn.uplifterinc.com/hc/en-us/articles/42491392157203-How-to-create-update-registration-forms-for-my-registration-process

Agreements to sign
Finally, under the tab 'agreements to sign' you can set up agreements to be signed online or waivers to be uploaded.

Loyalty   Character   Sportsmanship

More information on the setup of waivers can be found here: https://learn.uplifterinc.com/hc/en-us/articles/42491501835795-How-to-add-or-update-online-agreements-waiver-policy-as-part-of-my-registration-process

HorseReg also has an option to setup a store under your event (or club) to sell merchandize related to your event: https://learn.uplifterinc.com/hc/en-us/articles/42491498312083-How-to-create-a-store-to-be-included-in-your-registration-process

The complete event set up process is explained on the Uplifter website here:

https://learn.uplifterinc.com/hc/en-us/articles/42491615027347-Registration-Process-Setup-HOW-TO-SETUP-YOUR-EVENT-PROGRAM-COMPETITION-ACTIVITY

If you have any further questions, please don't hesitate to contact the National Office.