

Canadian Pony Club



HORSEREG HANDBOOK FOR PONY CLUB

[Abstract](#)

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



CANADIAN PONY CLUB

HORSEREG FOR BRANCH, CENTRE & REGION

2025

Loyalty

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Sportsmanship

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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.



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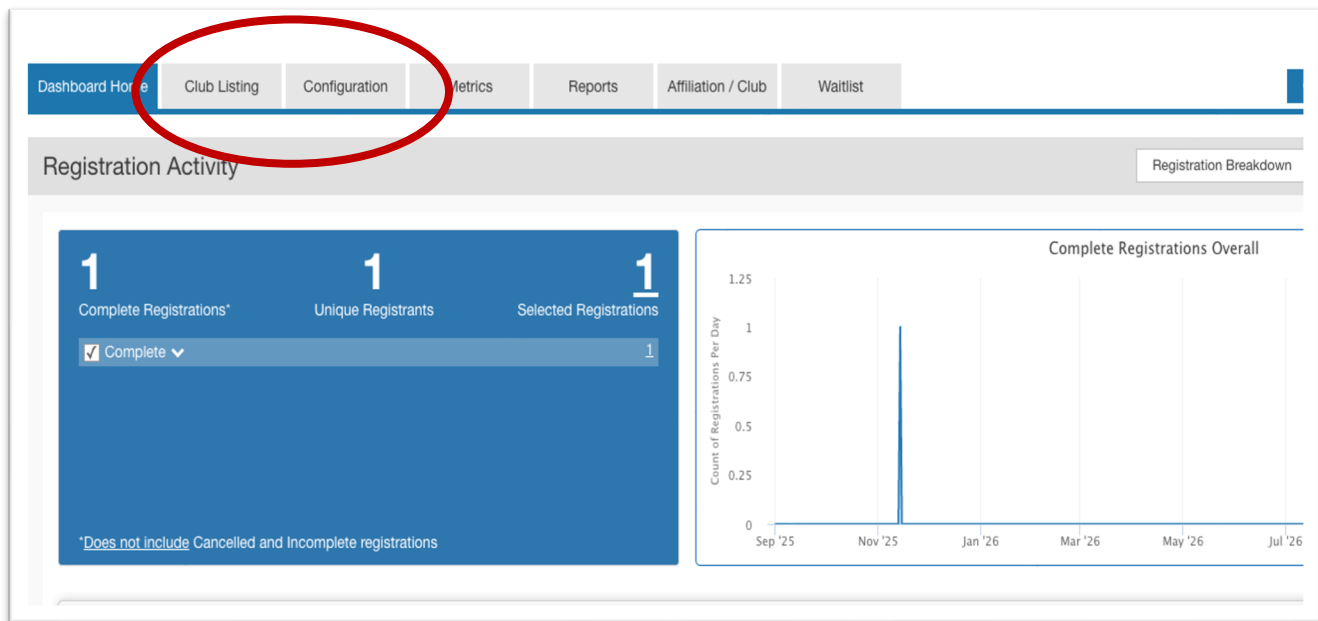
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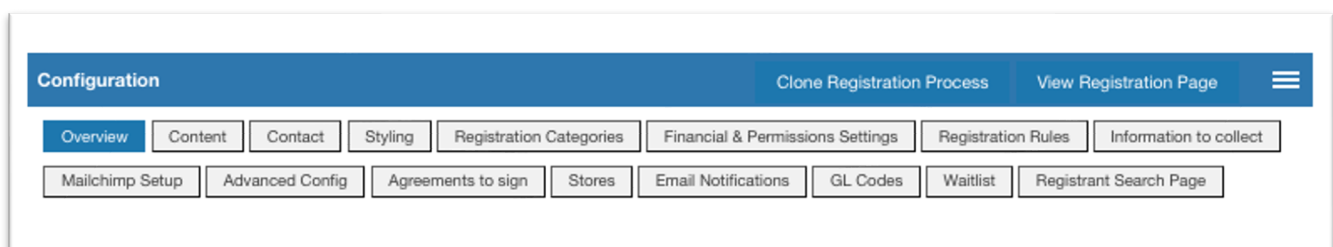
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Under [club listing](#) you can update your address information and your social media links

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)



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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.



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Overall Setup

Reg. Process Max Capacity

☐ Display Capacity Balance on the Registration Page

Age Calculation Date

If left blank, then the system will use the current date (i.e. the date that the person registers) to calculate the participant/member age

☒ Allow Multiple Registration (If ticked, each person will be able to register for more than one registration category within this registration process)

Pricing Logic Configuration Options

Registration Categories

Fields Displayed to Registrants

Individual Registration Categories

Edit Display OrderAdd New Category

Edit	Order	Name	Price	Discounts	Payment Method	Is used for	Action	Status	Open/Close date	Gender	Age	Capacity	Delete
	1	Cochrane Pony Club Youth Membership 2026	\$200.00	-	Full (one-time)	Individual	-	OPEN	Sep 1, 2025 / Sep 1, 2026	Not Required	5-25	30	
	2	Cochrane Pony Club Horse Master Membership 2026	\$200.00	-	Full (one-time)	Individual	-	OPEN	Sep 1, 2025 / Sep 1, 2026	Not Required	25-150	30	
	3	Cochrane Pony Club Volunteer Membership 2026	\$0.00	-	Full (one-time)	Individual	-	OPEN	-	Not Required	25-150	10000	

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.



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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

Admin Permissions Setup

Add process level only admin

Financial Organization Permissions

The admins listed below have access to the registration process due to their roles as administrators within the financial organization affiliated with said process.

Owner

Allison Palmer

Financial Controllers

CPC Administrator

Manage Controllers

Administrators

Danielle Williams

Manage Permissions

Process Level Only Permissions

The admins listed below are granted access exclusively to that registration process. Their access does not extend to other processes associated with the financial organization unless explicitly specified for those particular processes.

Name

User Account Email

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

Financials & Accounting

Edit financial organization setup

Refunds

Financial Reports

Open Financials & Accounting

Account

Cochrane Pony Club (#2625)

Payment processor

Paysafe

Status

Cochrane Pony Club (#1002999632) - Active
Created on: 2024-09-05

Applicable Processing Fees

Canadian Pony Club OFFLINE (3.1% + \$0.20)
Canadian Pony Club and Regions (ONLINE TRANSACTIONS - Paysafe)

Processing Fees Structure

Organizer Pays

Applicable taxes (on processing fees)

GST (5%)

Taxes Structure

Organizer Pays

Applicable taxes (on registration price)

0%

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.



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Forms Management for Cochrane Pony Club - 2026 memberships

Mass Update Lockdown Date Bulk Download Registrants Files

Create New Form

Forms

View forms displayed for: View All

Include fully customizable questions in your registration process. Forms can be shown to everyone or targeted to specific registration options.

NOTE:

- You do not need to create questions for First Name, Last Name, and Email. These fields are defaulted into your registration process
- If you want to use an existing form that has already been created for another registration process you manage, email info@horsereg.com

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.

Agreement Management for Cochrane Pony Club - 2026 memberships

Reuse existing agreement Add new agreement

View agreements displayed for: View all

Include documents for signature in your registration process. The agreement can be shown to everyone or targeted at specific registration categories.

Cochrane and District Agricultural Society Waiver

Type: Agreement / Waiver
Separated agreements: Minor [0-18] Adult [18-120]

Add Language Edit type Remove

Applies to all registration categories Edit display options

ENGLISH CDAS waiver Edit content

Branch rules

Type: Agreement / Waiver
Separated agreements: Minor [0-19] Adult [19-120]

Add Language Edit type Remove

Applies to all registration categories Edit display options

ENGLISH Cochrane Pony Club member rules and guidelines Edit content

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.



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Agreement | Waiver Setup

Waiver Title

Cochrane and District Agricultural Society Waiver

Is this a waiver/agreement for registrants to sign? Or a refund policy for the purchaser to agree to?

☒ Document to be signed by each participant (eg: Agreement/Waiver)

☐ Document to be signed by the purchaser only (eg: Refund Policy)

Do you need separate agreements for minors and adults?

☒ Participants will include adults and minors: adults will sign the document for themselves, minors will have the document signed by their parent/guardian (basic info will be captured for the parent/guardian)

☐ All participants are adults: each participant will sign the document for themselves

Age of Consent

Adult Agreement	Minor Agreement
18	0 18

Is a signature needed before checkout?

☐ No. Registration can be completed without a signed agreement. Please Note, you are responsible for ensuring all agreements are signed before the participation deadline.

☒ Yes. The participant must complete and sign the agreement before they can access the cart and checkout. The registration cannot be completed registration without a completed agreement.

Cancel Done

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).



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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”.

Dashboard Home Club Listing Configuration Metrics Reports Waitlist Clone Registration Process View Registration Page

Warning: This registration process is currently **Under Construction** please ensure you have completed your configuration before submitting it for review. The review and approval process takes between **two (2) and five (5) business days**. Please note: only registration processes linked to **fully activated payment processor accounts** will be activated (the status of your payment processor account can be verified from Dashboard Home > Financials & Accounts section). An 'action required' or 'pending setup' payment processor account can take up to three (3) weeks to activate.

Club Name [] Listing Preview Edit

SUBMIT FOR REVIEW

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.

Dashboard Home Club Listing Configuration Metrics Reports Affiliation / Club Waitlist Clone Registration Process View Registration Page

Registration Activity Registration Breakdown Registration Reports Manage Registrations

1 Complete Registrations* 1 Unique Registrants 1 Selected Registrations

1 Complete

Complete Registrations Overall

Registrations Per Day

chart title

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.

horsereg.com/#!/events/shuswap-lake-pony-club-2026-memberships

ENGLISH | FR

Shuswap Lake Pony Club - 2026 Memberships

September 1 2025 - December 31 2026

MEMBERSHIP

JOIN

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



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
2.5 Review Member Information

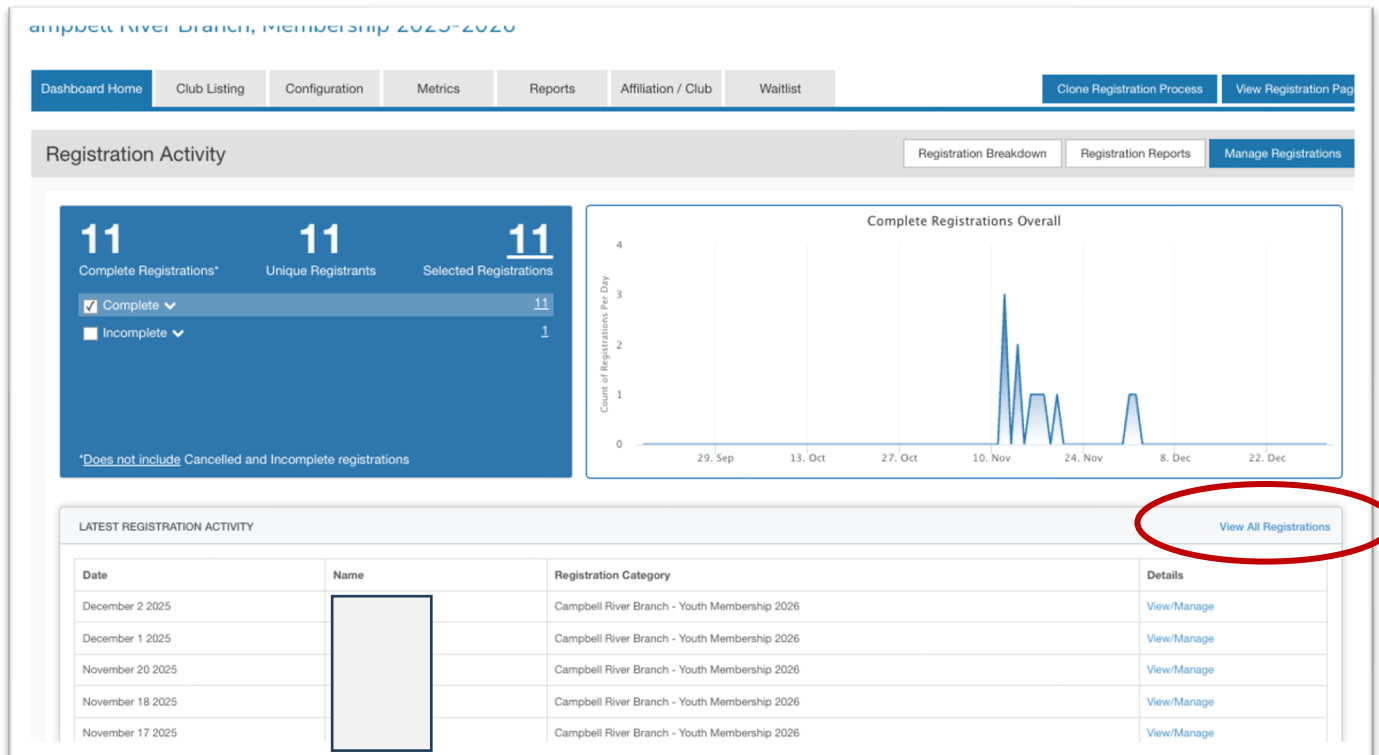
Membership

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.



Complete Registrations Overall



LATEST REGISTRATION ACTIVITY

Date	Name	Registration Category	Details
December 2 2025		Campbell River Branch - Youth Membership 2026	View/Manage
December 1 2025		Campbell River Branch - Youth Membership 2026	View/Manage
November 20 2025		Campbell River Branch - Youth Membership 2026	View/Manage
November 18 2025		Campbell River Branch - Youth Membership 2026	View/Manage
November 17 2025		Campbell River Branch - Youth Membership 2026	View/Manage

[View All Registrations](#)



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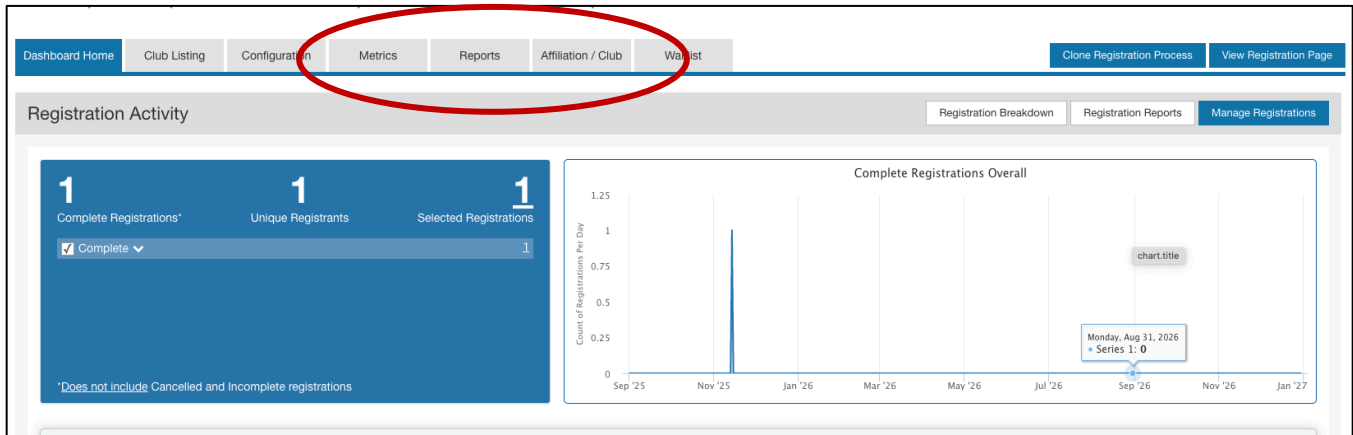
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Further information about your members is available through the [Metrics](#), [Reports](#) and /or [Affiliation/Club](#) tabs.



2.5.1 Metrics

Under the 'Metrics' tab you 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, providing 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.



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Club Reports		
Report Title	About	Last Updated
Parent / Guardian Information	Information from the parent or legal guardian of your members	2025-11-12
		Update Download
Affiliate Membership Report	This report contains select information directly from your Provincial Membership Organization database for the members who chose your organization as their affiliate.	Never
		Update Download
Registration Reports		
Report Title	About	Last Updated
Complete Registrations w/ Membership Info requiring admin attention	Complete registrations requiring admin attention, including the registrants Branch membership information	Never
		Update Download
Complete w/ Membership Info	Complete registrations along with each registrants provincial membership info.	Never
		Update Download
Complete registrations	Complete registrations only	Never
		Update Download
Incomplete registrations	Incomplete registrations only (on-going or pending payment in cart)	Never
		Update Download

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.

Organization	Membership status	Membership Type	Expiry Date
Western Ontario Region Pony Club - 2026 Membership	PENDING REQUIREMENTS	1 option	
		Western Ontario Region Youth Membership 2026	December 31 2026
Canadian Pony Club - 2026 Membership	ISSUED	1 option	

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.



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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 PTSTO membership validation tracking - a valid PTSTO 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 PTSTO membership for their membership with the CPC to be valid.

Membership Requirements				
Waivers	Signed Date	Status	Valid From	Valid To
Canadian Pony Club Code of Conduct and Ethics (Western Ontario Region Youth Membership 2026)	2025-09-03	COMPLETE	2024-09-01	2026-12-31
Canadian Pony Club - Concussion Code of Conduct Participant - Minor - Z4MRZ (Western Ontario Region Youth Membership 2026)	2025-09-03	COMPLETE	2024-09-01	2026-12-31
Canadian Pony club - Acknowledgement of Risk and Waiver of Liability - Minor - K13XN (Western Ontario Region Youth Membership 2026)	2025-09-03	COMPLETE	2024-09-01	2026-12-31
Requirements - Western Ontario Region Youth Membership 2026	Date(s)	Status		
OE Membership validation tracking	-	INCOMPLETE	How To Complete	

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

NOTE on PTSTO checks

On January 1st of the year another check of PTSTO membership is required, as some members will apply prior to the end of the previous year with a PTSTO 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.



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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”



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Permissions Info

Edit Financial Account Permissions

Edit Process Level Only Permissions

Financial Organization Permissions

Owner: Allison Palmer

Process Level Only Permissions

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 31st. 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

Application 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 And 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 AUTHORIZED ***

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



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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. Please review all the information on your landing page.

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.



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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



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Financial controller¹ View account financials Download financial reports Receive payout deposit notifications	Administrator View, manage, edit registrations View, manage, edit membership details, event details and club details
Account owner All of the above plus Edit account details Add and remove financial controllers and administrators	

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'.

Alberta South Region Pony Club - 2025 Memberships

Dashboard Home

Metrics

Reports

Queued Items

Mass Edit & Printing

Configuration

Import Memberships / Certifications

View Membership Page

0
Active Memberships*

0
Selected Memberships

No data found

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

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



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HORSEREG FOR BRANCH, CENTRE & REGION

2025

Loyalty

Character

Sportsmanship

Alberta South Region Pony Club - 2025 Memberships

Dashboard Home | Members | Reports | Queued Items | Mass Edit & Printing | Configuration | Import Memberships / Certifications | View Membership Page

Overview | Primary Content | Secondary Content | Styling | Products | Mailchimp Setup | Profile widget | GL Codes

Landing Page Content | View Membership Page | Edit

Welcome to the Alberta South Region Pony Club!
JOIN OUR COMMUNITY, WE SHARE YOUR PASSION

Pony Club is the entry point to the world of safe, knowledgeable horsemanship. Combining hands-on

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.



CANADIAN PONY CLUB

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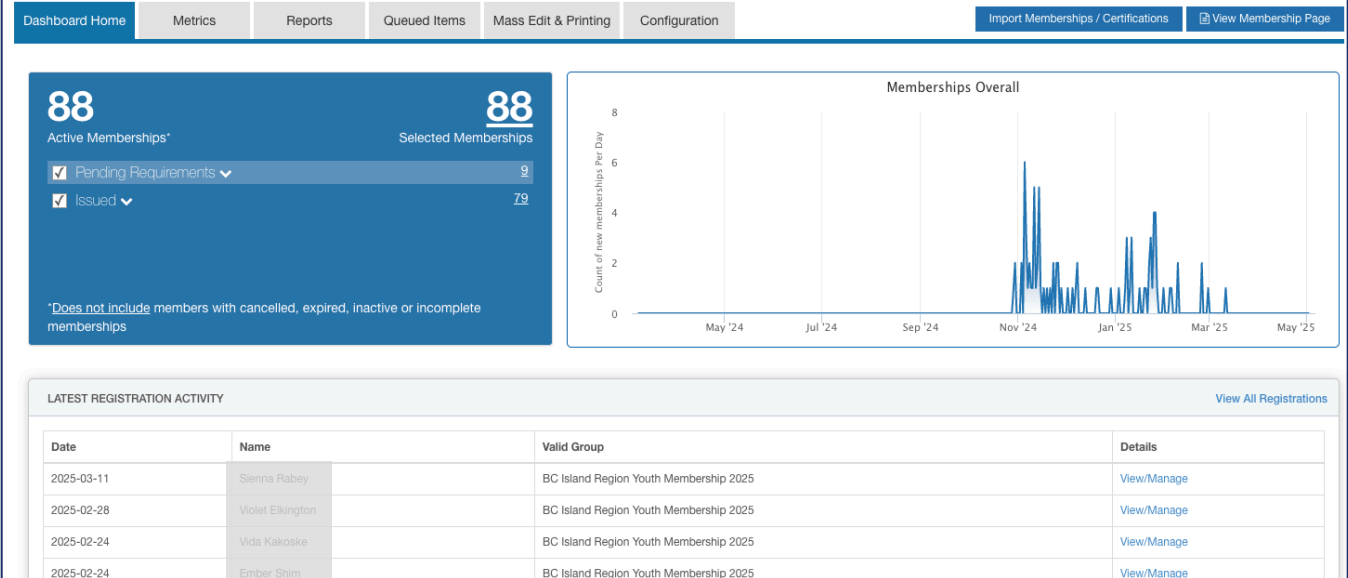
2025

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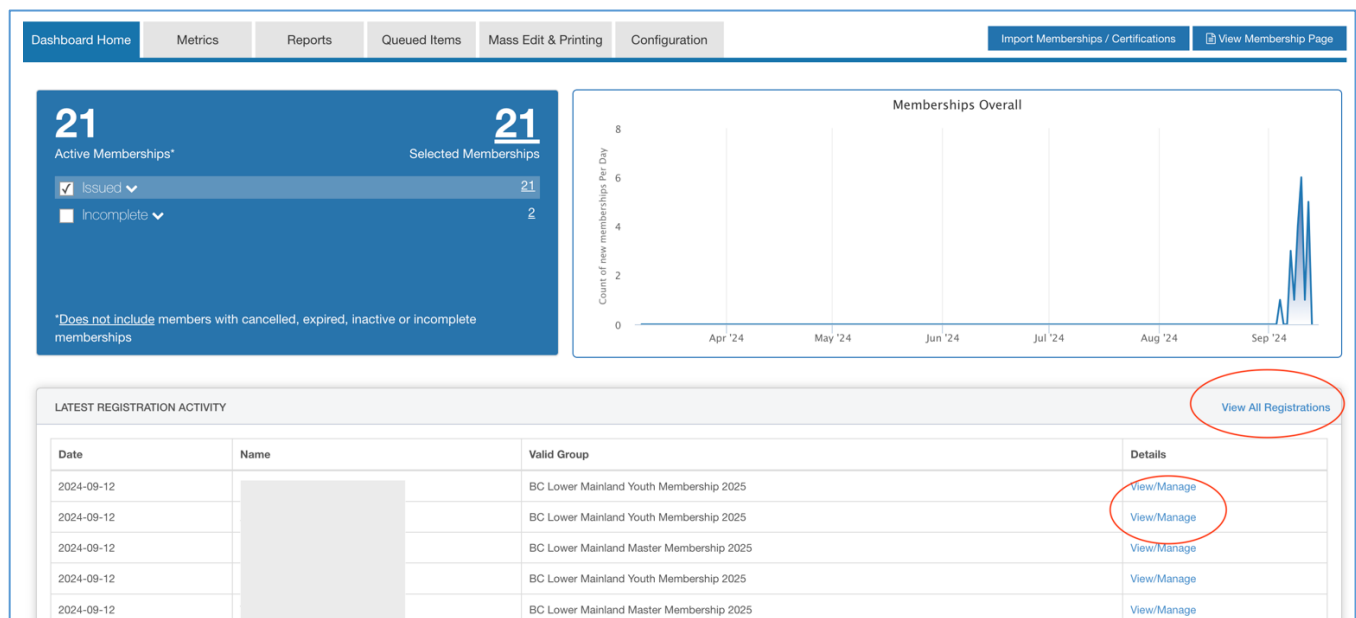
BC Island Region Pony Club - 2025 Memberships



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'





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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

Organization	Status	Group
Canadian Pony Club - 2025 Membership	CANCELLED	Canadian Youth Membership 2025
Canadian Pony Club - 2025 Membership	INCOMPLETE	-
Canadian Pony Club - 2025 Membership	PENDING REQUIREMENTS	Canadian Youth Membership 2025 (ABS ONLY)
Canadian Pony Club - 2025 Membership	ISSUED	Canadian Horse Master Membership 2025
Canadian Pony Club - 2025 Membership	ISSUED	Canadian Youth Membership 2025
Canadian Pony Club - 2025 Membership	ISSUED	Canadian Youth Membership 2025
Canadian Pony Club - 2025 Membership	INCOMPLETE	-
Canadian Pony Club - 2025 Membership	PROCESSING	Canadian Youth Membership 2025
Canadian Pony Club - 2025 Membership	PENDING REQUIREMENTS	Canadian Youth Membership 2025 (ABS ONLY)

ISSUED - issued: all requirements have been met, and the membership is paid for.²

PENDING REQUIREMENTS - Pending requirements: 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 - Processing: membership has been paid for, but not all waivers have been signed.

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

CANCELLED - Cancelled: 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 has only been automated in some Provinces 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.

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. This has to be done by the regional membership chair.

Membership Details

Membership Search / #538941 Membership Details

Kate Daniels



Name

Date of birth

Age

Gender

Email

Phone Number

User

Membership Info

Organization
Alberta South Region Pony Club - Memberships 2024

Status
ISSUED

Updated Effective Membership Date
-

ABS Number
ABS0567

Edit

Notes

Edit

Upload

Editor

Delete

Edit

Membership Requirements

Waivers	Signed Date	Status	Valid From	Valid To	
Canadian Pony Club - Concussion Code of Conduct Participant - Minor (Alberta South Youth Membership 2024)	2024-07-22	COMPLETE	2023-09-01	2024-12-31	View Waiver Generate Waiver PDF
Canadian Pony club - Acknowledgement of Risk and Waiver of Liability - Minor (Alberta South Youth Membership 2024)	2024-07-22	COMPLETE	2023-09-01	2024-12-31	View Waiver Generate Waiver PDF
Requirements - Alberta South Youth Membership 2024		Date(s)	Status		
AEF Membership tracking		2024-12-31	COMPLETE		

Attributes & Records

AB South Region Pony Club			
Name	Value	Last Updated	
ABS Number	ABS0567	July 22 2024, 12:30 PM	<div>EditDelete</div>
AEF Membership Information			
Name	Value	Last Updated	
AEF Membership Card (Most Recent)	MembershipCard2024_Kate-20240722122327.pdf	July 22 2024, 12:26 PM	<div>EditDelete</div>
AEF Membership - Expiry Date	2024/12/31 00:00:00	July 22 2024, 12:26 PM	<div>EditDelete</div>
AEF Membership Number	20237623	July 22 2024, 12:26 PM	<div>EditDelete</div>



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To check the uploaded PTSO³ 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.

Additional Information

Photo Consent

Participant (and participant parent/guardian when member is under 19 years of age) grant permission to the CPC and its Regions / Branches to photograph or record the participant during CPC activities. I consent to the use of these pictures or recordings to promote the Canada Pony Club through traditional and social media such as newsletters, websites, Instagram, Facebook and Youtube.

Alberta South Pony Club - Rider's information 2024

Emergency Contact Phone Number

Emergency Contact Full Name

Equestrian Canada Member Card

No

Equestrian Canada Number

2024 AEF Membership information

The Canadian Pony Club requires its members to be a current member with their PTSO. Alberta South members have to upload a copy of their AEF card prior to signing up for Pony Club. It is the member's responsibility to make sure the AEF membership is valid for the year they apply to be a Pony Club member. Please upload your card here

[AEFMembershipCard2024Annette-202312131149.pdf](#)

Choose File No file chosen

Please enter your most recent AEF expiry date *

2024-03-01

March 2024

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	01
02	03	04	05	06	07	08
09	10	11	12	13	14	15
16	17	18	19	20	21	22
23						

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

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



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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”.

Membership Details

Membership Search / #502173 Membership Details

Annette Buis

Name

Annette Buis

Date of birth

Age

Gender

Email

Phone Number

User

Upload

Editor

Delete

Membership Info

Organization

Alberta South Region Pony Club - Memberships 2024

Status

PENDING REQUIREMENTS

Updated Effective Membership Date

ABS Number

ABS0286

Edit

Notes

Edit

Membership Requirements

Waivers	Signed Date	Status	Valid From	Valid To	
Canadian Pony Club - Concussion Code of Conduct Participant (Alberta South Horse Master Membership 2024)	2023-12-13	COMPLETE	2023-09-01	2024-12-31	View Waiver Generate Waiver PDF
Canadian Pony club - Acknowledgement of Risk and Waiver of Liability (Alberta South Horse Master Membership 2024)	2023-12-13	COMPLETE	2023-09-01	2024-12-31	View Waiver Generate Waiver PDF
Requirements - Alberta South Horse Master Membership 2024	Date(s)	Status			
AEF Membership tracking	2024-09-02	INCOMPLETE			How To Complete

- 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.

- Scroll all the way down to Additional Information
- Change the date on the PTSO membership information to the date according to the document uploaded by the member.
- 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’



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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

NB Region Pony Club - 2025 Memberships

Dashboard Home

Metrics

Reports

Queued Items

Mass Edit & Printing

Configuration

Heatmap

Demographic

Affiliates

Memberships

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)



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3.7 Reports

Alberta South Region Pony Club - 2025 Memberships

[Dashboard Home](#) [Metrics](#) [Reports](#) [Queued Items](#) [Mass Edit & Printing](#) [Configuration](#)

DATE RANGE:

All

Date From:

YYYY-MM-DD

Time From:

HH : MM : SS AM

Click **update** to generate report. You will receive a notification via email once your report is ready for download, click the **update** button to be able to download your report.

IMPORTANT NOTICE TO SAFARI USERS: If you're using Safari as your preferred browser, you may notice that when you download a report, the browser will show the information handle raw data inside of the browser, so the only way to download the file is to save it from the browser manually. This issue is exclusive to the Safari web browser on Mac computers and select "Download Linked File". Alternatively, you can follow these steps when you are presented with the raw data on your screen.

Custom Reports

Report Title	About	Custom Report	Last Updated
Canadian Pony Club - Parent / Guardian information	Information from the parent or legal guardian of your members		Never
Region Pony Club - Testing Information	All of your regional members with their testing information		2025-02-10

Membership Reports

Report Title	About	Last Updated
Memberships - Pending requirements	Summary of all memberships with status - Pending requirements	Never

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'



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NOTE: Selecting the link for Safari WebKit: If you're using Safari as your preferred browser, you may notice that when you download a report, the browser will show the information in a text format, which is the browser's method of displaying the report. To handle raw data inside of the browser, so the only way to download the file is to save it from the browser manually. This issue is exclusive to the Safari web browser on Mac computers. To actually download the report, please right-click on the Download Button, and select "Download Linked File". Alternatively, you can follow these steps when you are presented with the raw data on your screen.

Create Custom Report

Custom Reports

Report Title	About	Custom Report	Last Updated
Canadian Pony Club - Parent / Guardian information	Information from the parent or legal guardian of your members		Never

Update Download

Select Report Type to Customize *

Memberships - All

Column options available [Reset back to default](#)

Click & sort the column in order that you need

Move All Move Up Move Down Remove

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

Select Report Type to Customize *

Memberships - All

Select Columns to Include

Column options available [Reset back to default](#)

HorseReg Membership ID

Checkout Date

Valid From

Valid To

License Numbers

Identity ID

Group Prints

Additional Questions

Waiver Signature Link

Admin Notes

Addons

Click & sort the column in order that you need

Move All Move Up Move Down Remove

Name Your Report *

Report Description *

Add a description for this report (less than 200 characters)

Cancel Save

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.



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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.

DASHBOARD

CPC Administrator - Financial Accounts

Funds Available: \$0.00

BC Lower Mainland Region Pony Club

Financial Account Status: On-Going

Please note that these statements do not reflect ad hoc charges such as chargebacks, card printing services

Cashflow | **Statements** | Transactions | Reports | Account Details | Payments

Paid features

Date Range: This Year | Date From: 2024-01-01 | Time From: 12:00:00 AM | Date To: 2024-12-31

*Please note that this information is only available since 08 Nov 2023 @ 10:11:05 a

Payout Filter: - Choose Payout Filter - | Filter by Batch ID: - Choose Batch ID -

Summary of Accounts | Balance Sheet | Income Statement

Summary of Accounts

ASSET
EFT
Electronic cash - from provider
Electronic cash - Paysafe account
Electronic cash - Stripe account
Electronic cash - WePay account

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



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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.

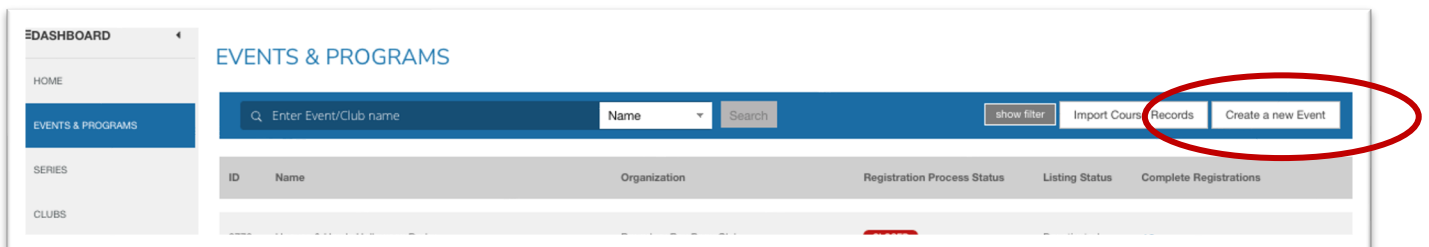
You also don't have to double check payment status and can add a waiver to be signed if applicable.

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.

Competition / Event Setup

WARNING: This is not a provincial application process - If you are looking to get a club membership/sanctioning or get your event sanctioned by your provincial body, please reach out to them for a direct link.

Use this wizard to get started with online registration process setup!

New listing

Listing Details

Competition / Event Name *



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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.

Choose an existing organization

Hi Annette,

Would you like your new event / club to be grouped under an existing organization?

All events within an organization category will;

- receive a single payout
- have grouped accounting data (event-specific information on transactions, registrations, etc. will still be available)

If you have any questions please contact our Support Team:

Technical Support
Toll Free Canada: 1-844-311-0551
Email: info@horsereg.com

Search for organization...

Existing Organization Categories:

- ☐ Alberta North Region Pony Club
- ☐ Alberta South Region Pony Club - Events
- ☐ Alberta South Region Pony Club - Memberships
- ☐ Alberta South Region Pony Club - Testing
- ☐ Alborak Pony Club Centre
- ☐ Alouette Pony Club
- ☐ Annapolis Pony Club
- ☐ Appleton Pony Club

Continue

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



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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)

Competition / Event Setup

WARNING: This is not a provincial application process - If you are looking to get a club membership/sanctioning or get your event sanctioned by your provincial body, please reach out to them for a direct link.

Use this wizard to get started with online registration process setup!

New listing

+ Listing Details

+ Classification

+ Social Media Links

What's Next?

Setup your online registration with HorseReg.

Configure registration categories, the registration process, waivers and more

SET UP REGISTRATION

Apply for a permit for this event.

Click below to begin your application

APPLY FOR A PERMIT

If you don't have everything ready you can visit the event dashboard, and at a later point finish your application.

SAVE & COME BACK LATER

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



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

Category Name & Description

Name

test1

Category Description

B I U

Category Description

Category Main Setup

Capacity

100

Display Type

Displayed during regi

Is used for

Individual

Registration opens:

YYYY-MM-C

Time (24H)

-- : --

Registration closes:

YYYY-MM-C

Time (24H)

-- : --

Restricted By Age

No

Min Age

Max Age

Restricted By Gender

No

Choose Registration Gender

Select

Custom Category ID

Price Setup

Price before tax

50

Category Price Name

test1 - \$50.00

ADD DISCOUNT

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



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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

New Registration Setup

+

Registration set up

-

Registration Categories

Individual Registration Categories

Add New Category

Edit	Order	Name	Price	Discounts	Payment Method	Is used for	Action	Open/Close date	Gender	Age	Capacity	Delete
	0	test1	-		Full (one-time)	Individual	-	-	Not Required	---	100	

☒ Would you like to set an overall event capacity?
Overall Event Capacity: (required)

1000

Registration Forms

-

Agreements and Waivers

Do your registrants need to agree to anything (eg. a waiver or refund policy) by signing an electronic document online?

Add new agreement

Registrants/Purchasers must agree to the following agreements applicable to them via online signature:
No Agreements Yet



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

New Registration Setup

Registration set up

Registration Categories

Individual Registration Categories

Add New Category

Edit	Order	Name	Price	Discounts	Payment Method	Is used for	Action	Open/Close date	Gender	Age	Capacity	Delete
	0	test1	-		Full (one-time)	Individual	-	-	Not Required	---	100	

☒ Would you like to set an overall event capacity?
Overall Event Capacity: (required)

1000

Registration Forms

Agreements and Waivers

What's Next?

Visit the dashboard to continue configuration, previewing and testing your event registration process

CONTINUE TO DASHBOARD

Submit to HorseReg for review and someone will be in touch to finalize and launch.

SUBMIT FOR REVIEW

Apply for a permit for this event.
Click below to begin your application

APPLY FOR A PERMIT

By continuing to the dashboard, you can review and test the event registration, before submitting it for review:



CANADIAN PONY CLUB

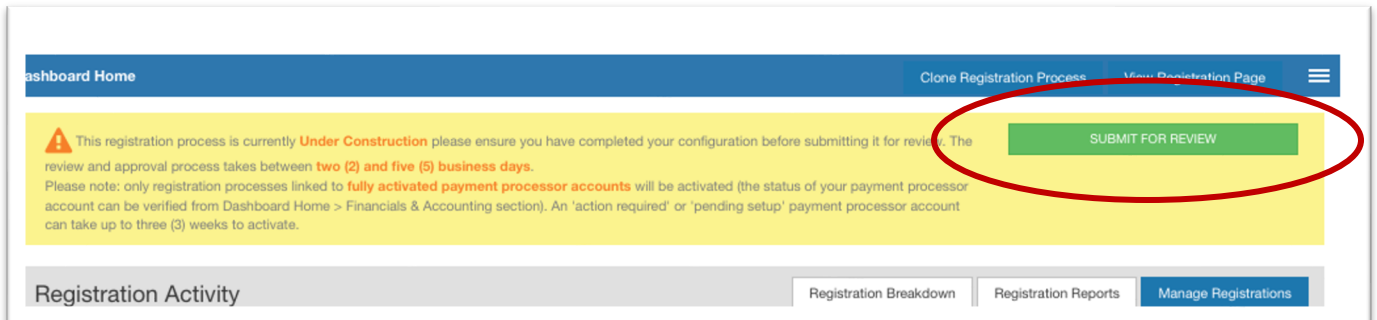
HORSEREG FOR BRANCH, CENTRE & REGION

2025

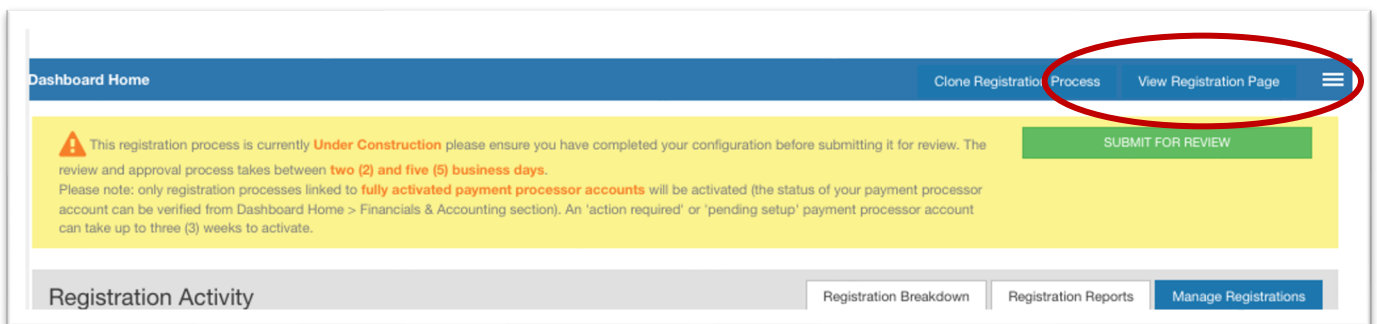
Loyalty

Character

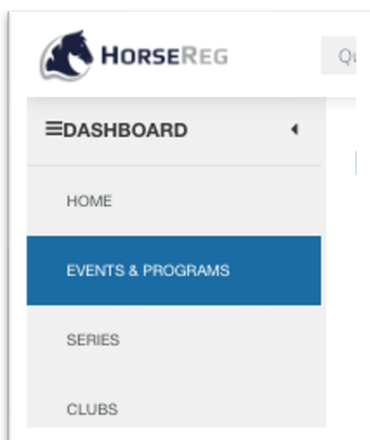
Sportsmanship



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 your 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



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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](#)'



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[Dashboard Home](#) [Competition / Event Listing](#) [Configuration](#) [Metrics](#) [Reports](#) [Waitlist](#) [Clone Registration Process](#) [View Registration Page](#)

⚠️ This registration process is currently **Under Construction please ensure you have completed your configuration before submitting it for review. The review and approval process takes between **two (2) and five (5) business days**.**

Please note: only registration processes linked to **fully activated payment processor accounts** will be activated (the status of your payment processor account can be verified from Dashboard Home > Financials & Accounting section). An 'action required' or 'pending setup' payment processor account can take up to three (3) weeks to activate.

[SUBMIT FOR REVIEW](#)

[Overview](#) [Content](#) [Contact](#) [Styling](#) [Registration Categories](#) [Financial & Permissions Settings](#) [Registration Rules](#) [Information to collect](#) [Mailchimp Setup](#) [Advanced Config](#) [Agreements to sign](#) [Stores](#)

[Email Notifications](#) [GL Codes](#) [Waitlist](#) [Registrant Search Page](#)

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.

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[Configuration](#) [Clone Registration Process](#) [View Registration Page](#)

[Overview](#) [Content](#) [Contact](#) [Styling](#) [Registration Categories](#) [Financial & Permissions Settings](#) [Registration Rules](#) [Information to collect](#) [Mailchimp Setup](#) [Advanced Config](#)

[Agreements to sign](#) [Stores](#) [Email Notifications](#) [GL Codes](#) [Waitlist](#) [Registrant Search Page](#)

Overall Setup

[Edit](#)

Reg. Process Max Capacity

☐ Display Capacity Balance on the Registration Page

☐ Allow Multiple Registration (if ticked, each person will be able to register for more than one registration category within this registration process)

Age Calculation Date

If left blank, then the system will use the current date (i.e. the date that the person registers) to calculate the participant/member age

Registration Categories

[Fields Displayed to Registrants](#) ▼

[Edit Display Order](#) [Add New Category](#)

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	✖



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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.

Alberta South Regional D-C1 Testing 2025

Configuration

Clone Registration ProcessView Registration Page

OverviewContentContactStylingRegistration Categories**Financial & Permissions Settings**Registration RulesInformation to collectMailchimp SetupAdvanced Config

Agreements to signStoresEmail NotificationsGL CodesWaitlistRegistrant Search Page

Financials & Accounting

limited visibility

Edit financial organization setup

Account Alberta South Region Pony Club - Testing (#3991)	Organization group Alberta South Region Pony Club (#48)	Payment processor Paysafe
Status Alberta South Region Pony Club (#1003304614) - Active Created on: 2024-05-14	Applicable Processing Fees Canadian Pony Club OFFLINE (3.1% + \$0.20) Canadian Pony Club and Regions (ONLINE TRANSACTIONS - Paysafe)	Processing Fees Structure Organizer Pays
Applicable taxes (on processing fees) GST (5%)	Taxes Structure User Pays	Applicable taxes (on registration price) 0% - Tax exempt - created by 14641_install_stripe_gateway_fee_taxes script

Admin Permissions Setup

Add process level only admin

Financial Organization Permissions The admins listed below have access to the registration process due to their roles as administrators within the financial organization affiliated with said process	Process Level Only Permissions The admins listed below are granted access exclusively to that registration process. Their access does not extend to other processes associated with the financial organization
--	--

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.



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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'.

Alberta South Regional D-C1 Testing 2025

Dashboard Home Competition / Event Listing Configuration Metrics Reports Waitlist

Overview Content Contact Styling Registration Categories Financial & Permissions Settings Registration Rules Information to collect

Main Information

Registration Process Data Requirement

When starting the registration process, the registrant will be presented with any fields that are marked as "required" or "optional". If their profile d

Gender

☐ Enable "Unspecified" gender option

Date Of Birth

Please note: If any of your individual registration categories (see [registration categories](#) tab) has either a DOB and/or Gender restriction, the DO



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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.

Forms Management for test

Mass Update Lockdown Date Bulk Download Registrants **Create New Form**

Forms View forms displayed for: View All

Include fully customizable questions in your registration process. Forms can shown to everyone or targeted to specific registration options.

NOTE:

- You do not need to create questions for First Name, Last Name, and Email. These fields are defaulted into your registration process
- If you want to use an existing form that has already been created for another registration process you manage, email info@horsereg.com

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.

Create Custom Form

English Use this language only ☒ French Use this language only ☐

Name *

☐ Add Form Header Description Content

Display * ☒ Show on all Individual Categories [Clear selection](#)

Name	Type
<input checked="" type="checkbox"/> test1	Individual Category

Cancel Create Form



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

Name: Lower Level Testing Form

Display Order: 0
Number of questions: 6

[Edit Display](#) [Edit Questions](#) [Delete](#)

Show on all Individual Categories

- 1 Name of Branch
- 2 Name of Branch Test Representative
- 3 Please indicate the last full level you achieved - leave blank if you haven't tested [View options](#)
- 4 Please indicate the last partial level you achieved
- 5 Please indicate what full level or partial levels you intend to test
- 6 Please upload a copy of your testing application signed by the applicable people (Instructors and the DC or Test Representative)

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

Drop down menu

3 Please indicate the last full level you achieved - leave blank if you haven't tested

Question 3 (EN) * Question 3 (FR) *

Please indicate the last full level you

☐ Add question description content

Required ☐ No Lock Registrant Edit ☐ No

Question Type * Dropdown (single-select) Display Order * 3

Edit Lockdown Date

yyyy-MM-dd

-- : --

Dropdown Options ☐ Enable customisable messages, shown only when a specific question option is chosen

Option 1 (EN) *	Option 1 (FR) *	Triggered Question(s)	Display Order
D		-- Select --	0
Option 2 (EN) *	Option 2 (FR) *	Triggered Question(s)	Display Order
D1		-- Select --	1
Option 3 (EN) *	Option 3 (FR) *	Triggered Question(s)	Display Order
D2		-- Select --	2
Option 4 (EN) *	Option 4 (FR) *	Triggered Question(s)	Display Order
C		-- Select --	3

[Add Option](#)



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Short Answer

4 Please indicate the last partial level you achieved

Question 4 (EN) * Question 4 (FR) *

Please indicate the last partial level

☐ Add question description content

Required ☐ No

Lock Registrant Edit ☐ No

Question Type * Short Answer (text)

Display Order * 4

Edit Lockdown Date

yyyy-MM-dd

File upload

6 Please upload a copy of your testing application signed by the applicable people (Instructors and the DC or Test Representative)

Question 6 (EN) * Question 6 (FR) *

Please upload a copy of your testing

☐ Add question description content

Required ☒ Yes

Lock Registrant Edit ☐ No

Question Type * File Upload

Display Order * 6

Allowed file types

All

Minimum File Size (MB)

Maximum File Size (MB)

Edit Lockdown Date

yyyy-MM-dd

Save Add New Question

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

More information on setting up questions different types of questions 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.



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Agreement Management for Alberta South Regional Finals 2025

Reuse existing agreement Add new agreement

View agreements displayed for View all

Include documents for signature in your registration process. The agreement can be shown to everyone or targeted at specific registration categories.

Finals Agreement

Type: Refund Policy
One Agreement for All Ages

Add Language Edit type Remove

Applies to all registration categories Edit display options

ENGLISH Alberta South Regional Finals Agreement Cancel Save

Adult Agreement

Waiver Title *

Alberta South Regional Finals Agreement

Waiver Body *

Source | X | Copy | Paste | Undo | Redo | Bold | Italic | Underline | Strikethrough | Text color | Background color

Normal - Font - Size - A - A -

Members must be members in good standing which is defined as having 60% attendance at a Branch level and fees paid.

Each rider will enter the Competition by Division as suggested by Pony Club Level as of the date of the show. Good sportsmanship suggests that if you regularly compete at higher levels in "non-pony club" competitions, you should, with the approval of your DC and coaches, enter at the higher levels.

Stalls and pens must be cleaned before departing the grounds. Please check with

body p span span span span span span

Upload File Upload Document *size limit 5MB
Upload a DOCX or PDF version of your waiver so it is available for download by participants.

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.