

Introduction

Open CPD provides a fast, reliable way to issue CPD certificates, whether you're running an LMS, managing training manually, or supporting in-house learning. This document outlines the options available for integrating your existing systems with Open CPD.



While we offer advanced automation options, most of our clients find that a simple daily upload process meets their needs with **minimal cost and effort**.

Option 1: Manual Daily Upload (Recommended for Most Users)

Best for: Any organisation issuing under 1,000 certificates per day

How it works:

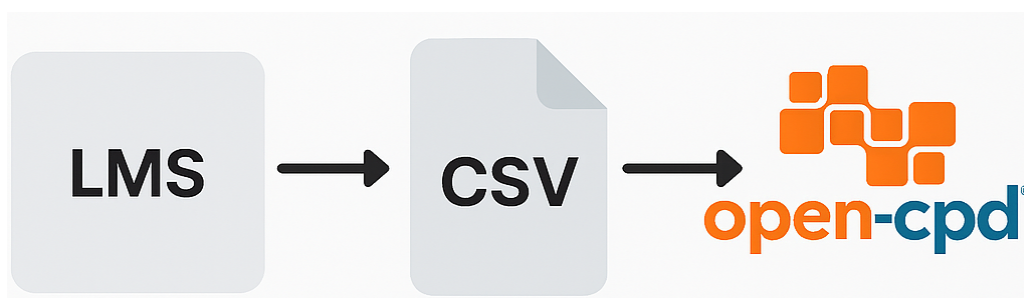
- Your system (LMS, CRM or manual records) generates a basic CSV export
- You log in to your Open CPD account
- Upload the file via our dashboard
- Certificates are issued within minutes

Time required: ~5 minutes per upload

No technical setup needed

Advantages:

- Fast and simple to implement
- No developer time or integration cost



Option 2: Automated Upload via Zapier or Zoho Flow

Best for: Organisations looking to reduce admin effort through light automation

How it will work:

- Triggered when a course is marked complete
- Data is sent automatically from your LMS (or CRM/Sheets/etc.) to Open CPD
- Uses secure webhooks or scheduled workflows
- Certificates issued automatically without logging in

Documentation: Ask us for details

Setup: Some initial configuration required

Effort/Cost: Moderate (low-code tools like Zapier, no custom development). Zapier charges

Advantages:

- Reduces manual steps
- Still gives you full control of the certificate data
- Works with most popular platforms (Thinkific, Moodle, Google Sheets, etc.)



Option 3: Direct Integration via Webhooks or Custom API (For High Volume Clients)

Best for: Organisations issuing 1,000+ certificates per day

Available for: Clients with dedicated tech teams or custom-built LMS platforms

How it will work:

- LMS sends a secure payload to Open CPD's API upon course completion
- Certificates are validated and issued in real-time
- System logs and dashboards available for reporting

Requirements:

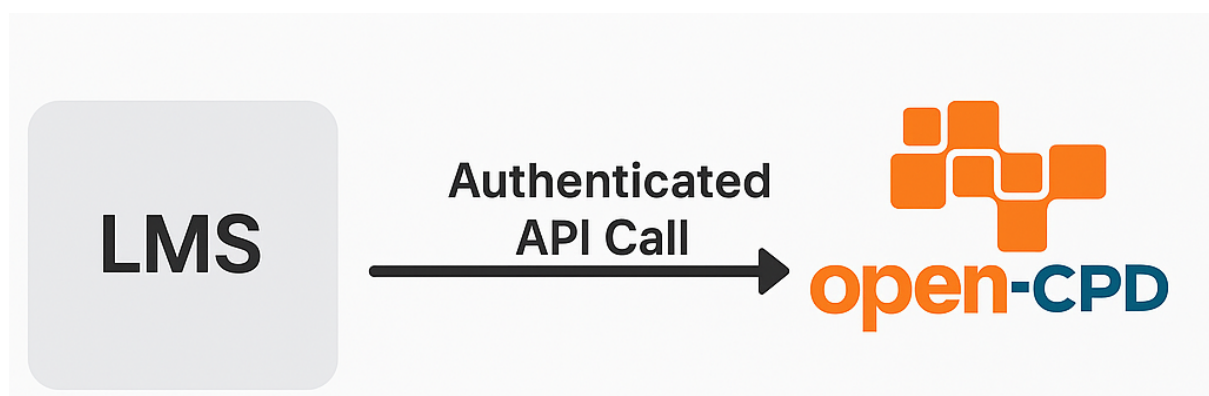
- API authentication (OAuth2 with Auth0)
- Dedicated setup and mapping
- Monitoring and support agreements

Estimated delivery time: Varies depending on scope

Effort: High – not recommended unless volume justifies it

Charging model: Integration fee may apply for setup and support

Support: Only available for qualifying clients with a dedicated contact



Summary & Next Steps

Option	Time to Implement	Effort	Cost	Best For
Manual Upload	Instant	Very Low	Free	95% of clients
Zapier/ZCRM	5-7days	Moderate	Low	Medium automation needs
Direct Webhooks/API	Custom	High	Medium–High	High-volume orgs

We are happy to work with you to determine the most efficient route. In most cases, we recommend starting with the manual upload and scaling up as needed.

What About Certificates Already Generated by the LMS?

Most LMS platforms (like Moodle, Thinkific, or Teachable) offer a built-in certificate feature. However, if you're using Open CPD, you should disable that feature and rely solely on Open CPD for certificate generation.

We can install your own certificate and badge designs within the Open CPD system — so they match your brand exactly.

Can I use my LMS's built-in certificate system with Open CPD?

No — certificates must be issued through Open CPD to ensure that verification and digital sharing features work correctly.

Uploading already-generated certificates is not supported

In automated setups (via Zapier or direct API), we'll also return the certificate URL and badge link, so they can be embedded back into your LMS profiles or user dashboards.

For clients with large-scale automation needs, we're open to discussing roadmap alignment and cost-sharing for bespoke integration.

For more information, please contact

info@open-cpd.com