



[cpbcan.ca](http://cpbcan.ca)  
[info@cpbcan.ca](mailto:info@cpbcan.ca)

Updated July 22, 2020

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# LOGIN

The first time you login:

1. Check your email for your login information.
2. Click the link provided in the email.
3. The link logs you in to the site automatically.
4. The site prompts you to set a password.

For future logins:

1. Login by clicking on **Member Zone** or clicking on the green **Login** button.
2. Having trouble logging in? Click **I forgot my username/password** and a reset e-mail will be sent to you.

CPB CANADA

About Join Events & Learning Certification Career Centre The Buzz **Member Zone** LOGIN

## Login

Home

Login to access members only content. Non-members: you will need to login to post a job or purchase our knowledge based assessment tool. If you do not have an account, please use our [Account Creation form](#).

You have been logged out

Username \* sarah

Password \* .....

Remember me

Login

[I forgot my username/password](#)

# UPDATE YOUR PROFILE

Your Member Zone provides you with access to your profile, invoices, events & learning, member tools & resources, your Very Important Bookkeeper (VIB) Advantage program, the certification pathway to CPB designation, our member directory, and more.

We recommend you start by updating your profile to ensure we have the correct information for you.

## Update Your Personal Information

1. Click the green **Login** button on the CPB Canada website.
2. **Login** with your username and password.
3. Click **My Profile** in the Member Zone
4. In the Personal Information section, click on the **Edit** button.
5. Check the **Display in Members Directory** box if you would like to be included in the CPB Canada member directory and the Find a Bookkeeper Directory.
  - a. *Note:* Inclusion in the Find a Bookkeeper directory is a benefit available to members who are pursuing or have earned their CPB designation (Apprentice, Technician, and CPB levels only).
6. Update your Personal Information including your title, email address, phone, and website.
7. Click **Save** to save your changes.

CPB CANADA

About Join Events & Learning Certification Career Centre The Buzz Member Zone LOGOUT

My Profile

My Dashboard  
My Profile  
My Invoices  
Events & Learning  
Tools & Resources  
VIB Advantage  
Get Certified  
Submit CPD  
Tests & Exams  
Company Profile  
Member Directory  
Membership Card

Home / Member Zone / My Profile

Profile : Sample Contact

Overview Certification Directory

To update your inclusion in the directory, edit your Personal Information

Personal Information Edit Work Information Edit

Sample Contact  
Member ID:  
Email : samplecontact@testco.ca  
Telephone No : 416-555-1212 ext. 123

Display in Directory: Yes

Alternative Address: View & Manage Addresses

You have no alternative address set.

Test Company  
Company Phone :  
Website : www.testco.ca  
Company Email : sample@testco.ca  
Description : Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Work Address:  
Primary Address

members/index.html

## Update Your Address

1. Click the green **Login** button on the CPB Canada website.
2. **Login** with your username and password.
3. Click **My Profile** in the Member Zone.
4. Click on the **View & Manage Addresses** button.
5. Update your mailing addresses and set your primary address.

The screenshot shows the CPB Canada website interface. At the top left is the CPB Canada logo. The navigation menu includes: About, Join, Events & Learning, Certification, Career Centre, The Buzz, Member Zone, and a LOGOUT button. A dropdown menu is open from the Member Zone, listing: My Dashboard, My Profile (highlighted with a red box), My Invoices, Events & Learning, Tools & Resources, VIB Advantage, Get Certified, Submit CPD, Tests & Exams, Company Profile, Member Directory, and Membership Card.

The main content area is titled "My Profile" with a breadcrumb trail: Home / Member Zone / My Profile. Below this is the "Profile : Sample Contact" section, which has tabs for Overview, Certification, and Directory. A message states: "To update your inclusion in the directory, edit your Personal Information".

The profile is divided into two main sections: "Personal Information" and "Work Information", each with an "Edit" button. The "Personal Information" section includes: Sample Contact, Member ID, Email (samplecontact@testco.ca), Telephone No (416-555-1212 ext. 123), Display in Directory (Yes), and Alternative Address. A red box highlights the "View & Manage Addresses" button next to the Alternative Address field. Below this, it says "You have no alternative address set." The "Work Information" section includes: Test Company, Company Phone, Website (www.testco.ca), Company Email (sample@testco.ca), and a Description. At the bottom of the Work Information section, there is a "Work Address" field with a "Primary Address" button below it.

At the bottom left of the page, the URL "members/index.html" is visible.

## Update Your Work Information

1. Click the green **Login** button on the CPB Canada website.
2. **Login** with your username and password.
3. Click **My Profile** in the Member Zone.
4. Go to the Work Information section and click on the **Edit** button.
5. Update your work information.
6. Click **Save** to save your changes.

**CPB CANADA**

About Join Events & Learning Certification Career Centre The Buzz Member Zone **LOGOUT**

My Profile


Home / Member Zone / My Profile

Profile : Sample Contact

Overview Certification Directory

To update your inclusion in the directory, edit your Personal Information

**Personal Information** [Edit](#)

Sample Contact 

Member ID:  
Email : samplecontact@testco.ca  
Telephone No : 416-555-1212 ext. 123


Display in Directory: Yes

Alternative Address: [View & Manage Addresses](#)

You have no alternative address set.

**Work Information** [Edit](#)

Test Company

Company Phone : 

Website : [www.testco.ca](http://www.testco.ca)

Company Email : [sample@testco.ca](mailto:sample@testco.ca)

Description : Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Work Address:

[Primary Address](#)

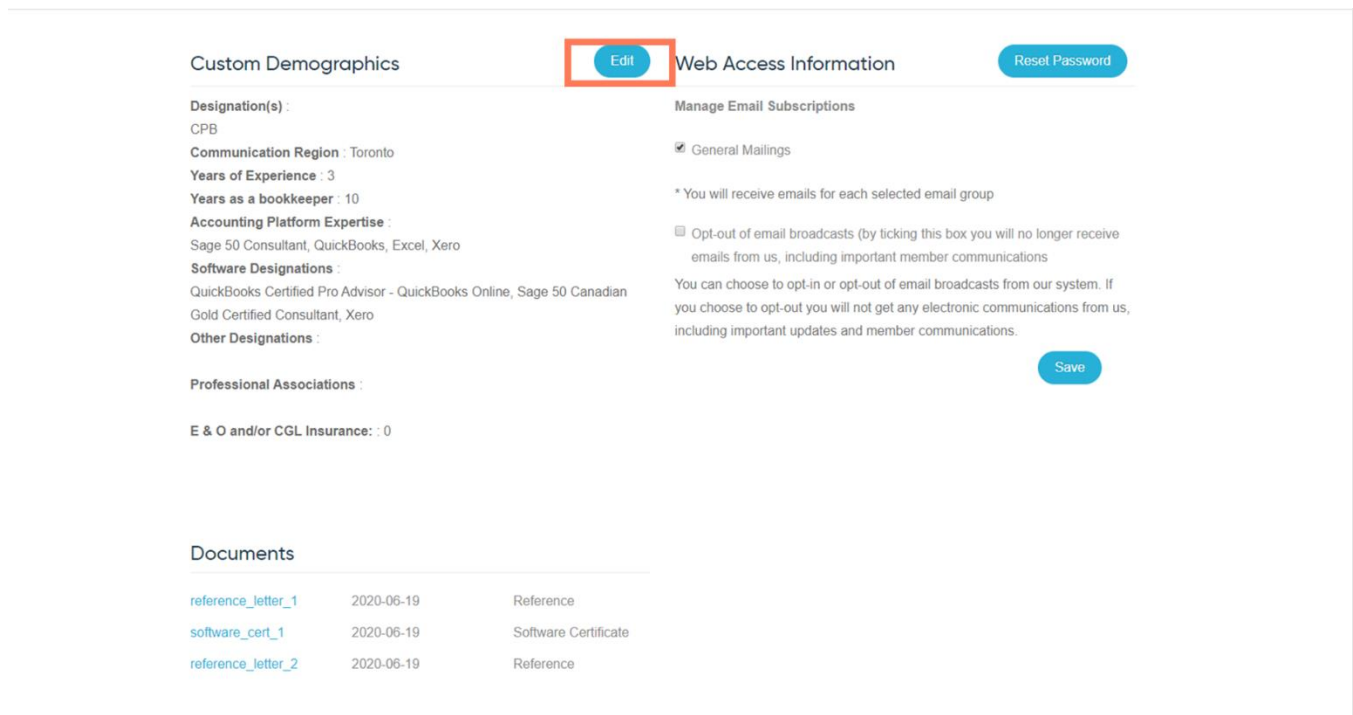
members/index.html

## Update Custom Demographics

The custom demographics section is located in the Member Zone, My Profile. In this section, you can update your designation(s), communication region for regional meeting updates, years of experience, accounting platform expertise, and accounting software designations. We recommend you update this section regularly as it will be used to populate the Find a Bookkeeper directory, for qualifying members (Apprentice, Technician, CPB).

To update your custom demographics:

1. Click the green **Login** button on the CPB Canada website.
2. **Login** with your username and password.
3. Click **My Profile** in the Member Zone.
4. Scroll down to **Custom Demographics** and click on the **Edit** button.
5. Update your information.
6. Click **Save** to save your changes.



Custom Demographics [Edit](#) Web Access Information [Reset Password](#)

**Designation(s) :**  
CPB

**Communication Region :** Toronto

**Years of Experience :** 3

**Years as a bookkeeper :** 10

**Accounting Platform Expertise :**  
Sage 50 Consultant, QuickBooks, Excel, Xero

**Software Designations :**  
QuickBooks Certified Pro Advisor - QuickBooks Online, Sage 50 Canadian  
Gold Certified Consultant, Xero

**Other Designations :**

**Professional Associations :**

**E & O and/or CGL Insurance :** 0

**Web Access Information**

**Manage Email Subscriptions**

General Mailings

\* You will receive emails for each selected email group

Opt-out of email broadcasts (by ticking this box you will no longer receive emails from us, including important member communications)

You can choose to opt-in or opt-out of email broadcasts from our system. If you choose to opt-out you will not get any electronic communications from us, including important updates and member communications.

[Save](#)

**Documents**

<a href="#">reference_letter_1</a>	2020-06-19	Reference
<a href="#">software_cert_1</a>	2020-06-19	Software Certificate
<a href="#">reference_letter_2</a>	2020-06-19	Reference



## Find a Bookkeeper Directory

The [Find a Bookkeeper directory](#) provides members with the opportunity to be featured in a directory that potential clients and employers can access when looking to hire a qualified bookkeeping professional. They can search for qualified bookkeepers based on first and last name, accounting platform expertise, software certifications, and keywords and know that our members have met the requirements and testing to achieve their certification pathway level.

### Standard profile

The standard profile is a [member benefit](#) included for members at the Apprentice, Technician, and CPB levels who are pursuing or have earned their CPB designation. The standard profile includes your name, location (city & province), and your contact information including phone, company name, and email.

To include your profile in the Find a Bookkeeper directory:

1. Click the green **Login** button on the CPB Canada website.
2. **Login** with your username and password.
3. Click **My Profile** in the Member Zone.
4. In the Personal Information section, click on the **Edit** button.
5. Make sure you have checked the **Display in Members Directory** box if you would like to be included in the CPB Canada member directory and the Find a Bookkeeper directory.
6. Click **Save** to save your changes.

### Enhanced profile

You also have the option to enhance your profile in the Find a Bookkeeper Directory if you qualify for this member benefit. The enhanced profile view includes first and last name, accounting platform expertise, software certifications, member type (certified or non-certified), and your certification level (Apprentice, Technician, or CPB).

To enhance your profile:

7. Click the **Directory** tab located at the top of your profile.
8. Scroll down to the **Enhanced Listing Preview**
9. Click **Here** to upgrade your profile.
10. Click **Purchase Now**.
11. Enter your first and last name. Click **Purchase Now**.

### Did you know?

- ✓ You can regularly update your enhanced profile listing throughout the year.
- ✓ You can add a link to your Digital Achievement badge in your enhanced profile bio.



Enhanced profile sample

**CPB CANADA**

About Join Events & Learning Certification Career Centre The Buzz **Member Zone** LOGOUT

**My Profile**

Home / Member Zone / My Profile

**Profile : Sample Member**

Overview Certification **Directory**

To update your inclusion in the directory, edit your Personal Information

**Directory Information** [Edit](#)

**Basic Directory**

<b>Sample</b> 	<b>Location</b> Toronto, ON	<b>Contact</b> Phone : 416-555-1212 Company: Test Company Email: samplemember@testco.ca
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**Enhanced Listing Preview**

You currently do not have an enhanced listing. [Click here to upgrade!](#)

<b>Sample</b> 	<b>Location</b> Toronto, ON	<b>Contact</b> Phone : 416-555-1212 Company: Test Company Email: samplemember@testco.ca	<b>Member Type</b> Certified
	<b>Accounting Platform Expertise</b> Excel QuickBooks Sage 50 Consultant Xero	<b>Software Certifications</b> QuickBooks Certified Pro Advisor - QuickBooks Online Sage 50 Canadian Gold Certified Consultant Xero	<b>Certification Level</b> CPB Level
	<b>Website</b> <a href="http://www.samplewebsite.ca">www.samplewebsite.ca</a>	<b>Bio</b> Sample Member is a Certified Professional Bookkeeper with more than 10 years of experience in the bookkeeping profession, serving small to mid-size clients. She has expertise with the restaurant, hospitality, real estate, and construction industries, providing a full range of services. Sample has received software certifications in QuickBooks ProAdvisor for 2020 (QBO, Enterprise Solutions and Point of Sale, Sage 50 and Xero. She is well versed in many accounting platforms including QB, Sage, Xero and has advanced Excel knowledge. She is also very active with CPB Canada, staying up-to date with regular webinars and attendance at the CPB Canada annual Ignite conference. Sample offers flexible hours, understanding that you are busy and may not be available on a regular Monday to Friday, 9-5 schedule. You can expect professional service with a smile.	

## Reset Your Password

To reset your password:

1. Click the green **Login** button on the CPB Canada website.
2. **Login** with your username and password.
3. Click **My Profile** in the Member Zone.
4. Scroll down to the Web Access Information section and click the **Reset Password** button.
5. Enter your new password. Confirm your new password.
6. Click **Save** to save your changes.

### Custom Demographics

Edit

#### Designation(s) :

CPB

Communication Region : Toronto

Years of Experience : 3

Years as a bookkeeper : 10

#### Accounting Platform Expertise :

Sage 50 Consultant, QuickBooks, Excel, Xero

#### Software Designations :

QuickBooks Certified Pro Advisor - QuickBooks Online, Sage 50 Canadian

Gold Certified Consultant, Xero

#### Other Designations :

#### Professional Associations :

E & O and/or CGL Insurance: : 0

### Web Access Information

Reset Password

#### Manage Email Subscriptions

General Mailings

\* You will receive emails for each selected email group

Opt-out of email broadcasts (by ticking this box you will no longer receive emails from us, including important member communications)

You can choose to opt-in or opt-out of email broadcasts from our system. If you choose to opt-out you will not get any electronic communications from us, including important updates and member communications.

Save

### Documents

<a href="#">reference_letter_1</a>	2020-06-19	Reference
<a href="#">software_cert_1</a>	2020-06-19	Software Certificate
<a href="#">reference_letter_2</a>	2020-06-19	Reference

# RENEW MEMBERSHIP

To renew your membership:

1. Click the green **Login** button on the CPB Canada website.
2. **Login** with your username and password.
3. Click **My Dashboard** in the Member Zone. Your dashboard contains your basic contact information, recent transaction, and membership information.
4. Click the **Renew My Membership** button located to the right, under **Membership**.
5. Complete the required information and submit your renewal.

The screenshot displays the CPB Canada Member Zone interface. At the top, the CPB Canada logo is on the left, and navigation links for 'About', 'Join', 'Events & Learning', 'Certification', 'Career Centre', 'The Buzz', and 'Member Zone' are in the center. A green 'LOGOUT' button is on the right. The 'My Dashboard' menu is open, showing options like 'My Profile', 'My Invoices', 'Events & Learning', 'Tools & Resources', 'VIB Advantage', 'Get Certified', 'Submit CPD', 'Tests & Exams', 'Company Profile', 'Member Directory', and 'Membership Card'. The main content area features a dark blue header with the text 'You're Current Logged In As Sample Member' and 'Toronto, ON', with a 'Contact Sample' button. Below this is a 'RECENT TRANSACTIONS' table with one entry: June 19, 2020, Invoice 30168, Amount 84.75, Status Paid. To the right, the 'MEMBERSHIP' section shows 'Certified Active' and 'EXPIRY June 18, 2021 (362 days)', with a 'Renew My Membership' button highlighted in a red box.

members/index.html

# REGISTER FOR EVENTS & LEARNING

CPB Canada provides all members with opportunities for meaningful networking and keeps you informed about the latest in business, workflow, technology, accounting practices, and more!

[Member benefits](#) include access to Upcoming Webinars, On-Demand Webinars, Regional Meetings, eligibility for the Bookkeeping Excellence Awards, and a discounted member rate for the annual CPB Canada Ignite Conference.

[Student Member benefits](#) include access to On-Demand Webinars, Regional Meetings, and a discounted student rate for the annual CPB Canada Ignite Conference.

Visit the CPB Canada calendar of events to see upcoming webinars & events.

1. Click the green **Login** button on the CPB Canada website.
2. **Login** with your username and password.
3. You can either click on **Events & Learning** in the Member Zone or hover to view the menu below with direct links to the Event Calendar, Upcoming Webinars, On-demand Webinars, Regional Meetings, Ignite Conference, Bookkeeping Excellence Awards
4. Select your event and **Register as a Member**.

**CPB CANADA**

About Join **Events & Learning** Certification Career Centre The Buzz **Member Zone** **LOGOUT**

My Dashboard  
My Profile  
My Invoices  
**Events & Learning**  
VIB Advantage  
Get Certified  
Submit CPD  
Tests & Exams  
Company Profile  
Member Directory  
Membership Card

Event Calendar  
Upcoming Webinars  
On-Demand Webinars  
Regional Meetings  
Ignite Conference  
Bookkeeping Excellence Awards

## Events & Learning Overview

Home / Events & Learning / Overview

### Reach Your Goals Faster With CPB Canada

We provide our members with opportunities for meaningful networking and keep you informed about the latest in business, work practices, and more! Are you ready to be inspired, build connections, and take your skills and knowledge to the next level? Not sure? Visit the CPB Canada [calendar of events](#) to search for upcoming webinars & events or browse the categories below:

#### Webinars

Online learning to help you enhance your knowledge, develop new skills, and hone your craft, so you can build a successful career.

#### Regional Meetings

In-person and virtual meetings to help you build your knowledge and connect with your local community of bookkeepers.

#### Annual Conference

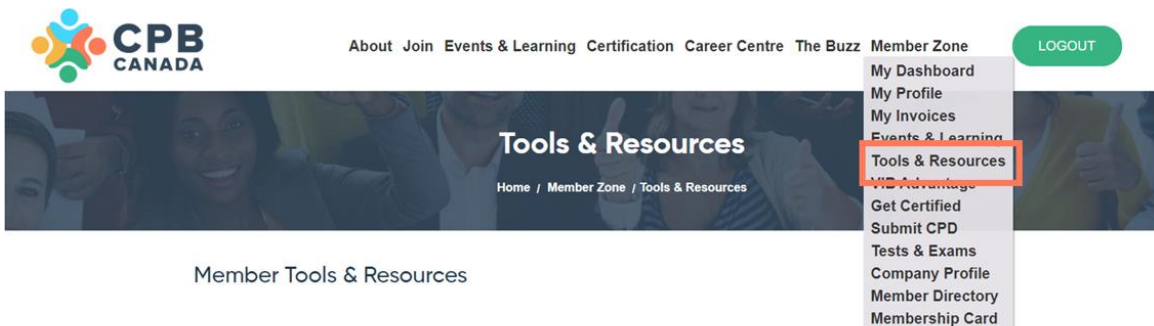
A yearly gathering of bookkeepers from across Canada with learning sessions, social activities, and leaders in accounting technology.

# ACCESS TOOLS & RESOURCES








Member tools & resources are accessible through the CPB Canada Member Zone. In this members-only section you'll find COVID-19 resources and updates, CPB Canada Code of Ethics and Professional Conduct, Board of Directors and bylaws, member policies, engagement letters, the Bookkeeper Knowledge Assessment Tool, reports and updates, and more.

To access tools & resources:

1. Click the green **Login** button on the CPB Canada website.
2. **Login** with your username and password.
3. Click **Tools & Resources** in the Member Zone.
4. Find the section you're looking for and click **Learn More**.



## Member Tools & Resources

	<p><a href="#">COVID-19 Resources &amp; Updates</a> Relevant tools &amp; resources to help our members &amp; their businesses stay healthy &amp; up-to-date.</p>
	<p><a href="#">Code of Conduct</a> Access CPB Canada's Code of Ethics &amp; Professional Conduct.</p>
	<p><a href="#">Governance</a> Meet our Board of Directors and view the CPB Canada Bylaws.</p>
	<p><a href="#">Member Policies</a> Find documents such as our Continuing Professional Development Units (CPDs) Policy, Reinstatement of CPB Designation Policy, and more.</p>
	<p><a href="#">Tools &amp; Guidelines</a> Access helpful tools like Engagement Letter Templates, Guidelines for Creating a Privacy Policy, the Bookkeeper Knowledge Assessment, and more!</p>
	<p><a href="#">Reports &amp; Updates</a> Access CPB Canada updates, industry updates and reports, and more!</p>
	<p><a href="#">Board Policies</a> Policies for the Board of Directors (BOD access only).</p>

# ACCESS EXCLUSIVE SAVINGS – VIB ADVANTAGE PROGRAM

As a CPB Canada member, your [member benefits](#) include the Very Important Bookkeeper (VIB) Advantage Program (excluding students). As a VIB, you have access to exclusive discounts on technology, telecom, and business supplies, and home, auto, and business insurance - products and services that are key to the success of your business. Be sure to check back often as our team is continuously working to bring on more partners to help you stretch your budget.

To access the VIB Advantage Program:

1. Click the green **Login** button on the CPB Canada website.
2. **Login** with your username and password.
3. Click **VIB Advantage** in the Member Zone.
4. Find the benefit you're looking for and click **Access Savings**.

The screenshot shows the CPB Canada website interface. At the top, the navigation bar includes 'About', 'Join', 'Events & Learning', 'Certification', 'Career Centre', 'The Buzz', 'Member Zone', and a 'LOGOUT' button. The 'Member Zone' dropdown menu is open, with 'VIB Advantage' highlighted. The main content area features a banner for 'VIB Advantage' with the text 'We Provide Strength (And Savings) In Numbers'. Below this, there is a 'Join us today!' button and a section titled 'VIB Advantage Program' with a brief description. The core of the page is a table of partner offers:

	<p><b>ClientTrack</b></p> <p>Take control of your practice and save time by combining all of the office management tools into one easy-to-use package with <b>ClientTrack</b>. Members receive an exclusive \$75 discount off your initial purchase.</p> <p><a href="#">Access savings</a></p>
	<p><b>GoForth Institute Small Business Training Program</b></p> <p>GoForth is Canada's leading small business training program helping entrepreneurs across the country run better businesses, become better leaders, embrace change, and face the future with more confidence. Through this partnership, members receive special pricing with GoForth and gain unlimited access for 1 year to their small business training program.</p> <p><a href="#">Access savings</a></p>
	<p><b>Intuit QuickBooks</b></p> <p>Tackle your to-dos anytime, anywhere with <b>QuickBooks</b>. As a CPB Canada member, you get 70% off your first six months of QuickBooks Online. Did you know? QuickBooks Online Accountant is free for accounting and bookkeeping firms.</p> <p><a href="#">Access savings</a></p>
	<p><b>John Ross Insurance - Errors &amp; Omissions</b></p> <p>This specially designed group insurance program through <b>John Ross Insurance</b> provides the all-important but often overlooked, coverage for Errors and Omissions (Professional) Liability, as well as an optional Commercial General Liability and Office Package to cover office contents such as computers and furniture, account receivables, and valuable papers. Rates starting as low as \$275/year, with members saving approximately \$400 per year on a 1,000,000 coverage package.</p> <p><a href="#">Access savings</a></p>
	<p><b>Park'N Fly</b></p> <p>The CPB Canada <b>Park'N Fly</b> Corporate account provides our members with 15% off regular rates. Members also earn points towards "FREE PARKING" each time you park with Park'N Fly.</p> <p><a href="#">Access savings</a></p>



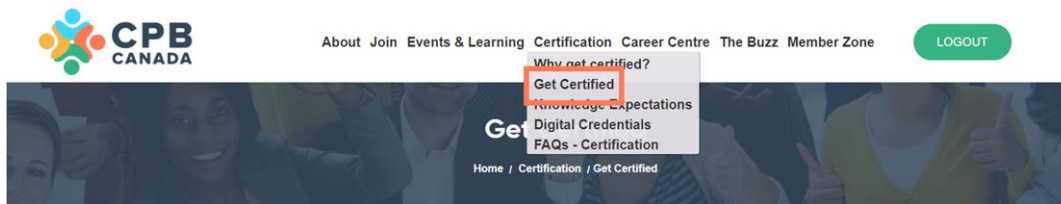
# CERTIFICATION PATHWAY TO CPB DESIGNATION

## Access the Certification Pathway

Entrance into the CPB Canada certification pathway to CPB designation is a benefit available to all members (excluding students). Your membership fee includes the Apprentice test and the Technician test. There is no test for the Candidate level. The fee to take the invigilated CPB exam is \$275 plus taxes.

To access the certification pathway:

1. Click the green **Login** button on the CPB Canada website.
2. **Login** with your username and password.
3. Click **Get Certified** either in the Member Zone or under **Certification, Get Certified** in the navigation bar.
4. Review the [requirements and knowledge expectations](#) for each level on the pathway and select the level you feel best matches your level of knowledge, skills, and experience.
5. Click **Get Started** and complete the requirements to join the level.



### We Help Canadian Bookkeepers Find Success & Build Their Future

Recognized across Canada by employers and clients, the Certified Professional Bookkeeper (CPB) designation validates that you have the knowledge, skills, and experience needed to meet the demands and support the success of their business. Are you a member of CPB Canada and ready to increase your visibility, enhance your professional brand, and take your career to the next level? Your journey to bookkeeping excellence starts here.

Not yet a member? [Join today](#) and gain access to our certification pathway to CPB designation.

	NON-CERTIFIED		CERTIFIED
Candidate	Apprentice	Technician	CPB
At the beginning of your bookkeeping career and just starting to develop bookkeeping knowledge	A solid understanding of bookkeeping fundamentals (view <a href="#">Knowledge Expectations</a> )	An intermediate level understanding of bookkeeping and business practices (view <a href="#">Knowledge Expectations</a> )	An advanced level understanding of the more complex and challenging aspects of bookkeeping and business practices (view <a href="#">Knowledge Expectations</a> )
No experience required	Minimum 1 year of experience	Minimum 2 years of experience	Minimum 3 years of experience
No letter of reference required	1 letter of reference	1 letter of reference if employed, 2 letters of reference if self-employed	2 letters of reference
Accounting software certification recommended	Accounting software certification	Accounting software certification	Accounting software certification
No test	Successful completion of Apprentice level test (min of 80%) – \$100 test fee included for initial attempt	Successful completion of Technician level test (min of 80%) – \$100 test fee included for initial attempt	Successful completion of CPB level exam (min of 80%) - \$275 exam fee
CPD units not required	Maintain 5 CPD units per year	Maintain 10 CPD units per year	Maintain 20 CPD units per year
<a href="#">Get started!</a>	<a href="#">Get started!</a>	<a href="#">Get started!</a>	<a href="#">Get started!</a>

### Share Your Achievements With CPB Canada Digital Credentials

Pathway levels that require evidence of knowledge, work experience, software certification, and entry tests (Apprentice, Technician, CPB) reward members with a CPB Canada digital badge of achievement! Each badge is backed by metadata detailing the requirements met for the level. This data is verified electronically and provides members, and the public, with proof that you have the knowledge expectations and experience that meet our national standard.

[Learn more](#)



## View Certification Progress

Members who are pursuing or have obtained their CPB designation through our certification pathway can view their progress through the CPB Canada Member Zone. In this section, you can view your progress on the certification pathway to CPB designation, how many continuing professional development (CPD) units you have earned/entered, and the number of CPD units needed to meet your yearly requirements.

To view your certification progress:

1. Click the green **Login** button on the CPB Canada website.
2. **Login** with your username and password.
3. Click **My Profile** in the Member Zone.
4. Click the **Certification** tab located at the top of your profile.

The screenshot shows the CPB Canada website header with the logo and navigation menu. The main content area is titled 'My Profile' and includes a breadcrumb trail: Home / Member Zone / My Profile. Below this, the user's profile is identified as 'Sample Member'. The 'Certification' tab is highlighted with a red box. The page displays progress bars for 'CPB Maintenance' (33% In Progress) and 'CPB Level' (100% Complete). The 'CPB Maintenance' section includes progress for Professional development (0/18), Personal credits (0/0), and Total development points (0/20). The 'CPB Level' section includes progress for Experience Points (1.0/1), Reference Points (2.0/2), Software certification Points (1.0/1), and Exam Points (1.0/1). The 'My Certification Information' section shows: First Name: Sample, Last Name: Member, Level Attained: CPB Level, and Date Attained: (blank). The 'My Transcript' section has a table with columns for Activity, Credit Type, Credits, and Date, and a single entry: '+ All: Software Certification'.

CPB CANADA

About Join Events & Learning Certification Career Centre The Buzz Member Zone LOGOUT

### My Profile

Home / Member Zone / My Profile

Profile : Sample Member

Overview Certification **Certification** Directory

To update your inclusion in the directory, edit your Personal Information

#### CPB Maintenance

In Progress

33%

Professional development	0/18
Personal credits	0/0
Total development points	0/20

#### CPB Level

Complete

100%

Experience Points	1.0/1
Reference Points	2.0/2
Software certification Points	1.0/1
Exam Points	1.0/1

#### My Certification Information

First Name	Sample
Last Name	Member
Level Attained	CPB Level
Date Attained:	

#### My Transcript

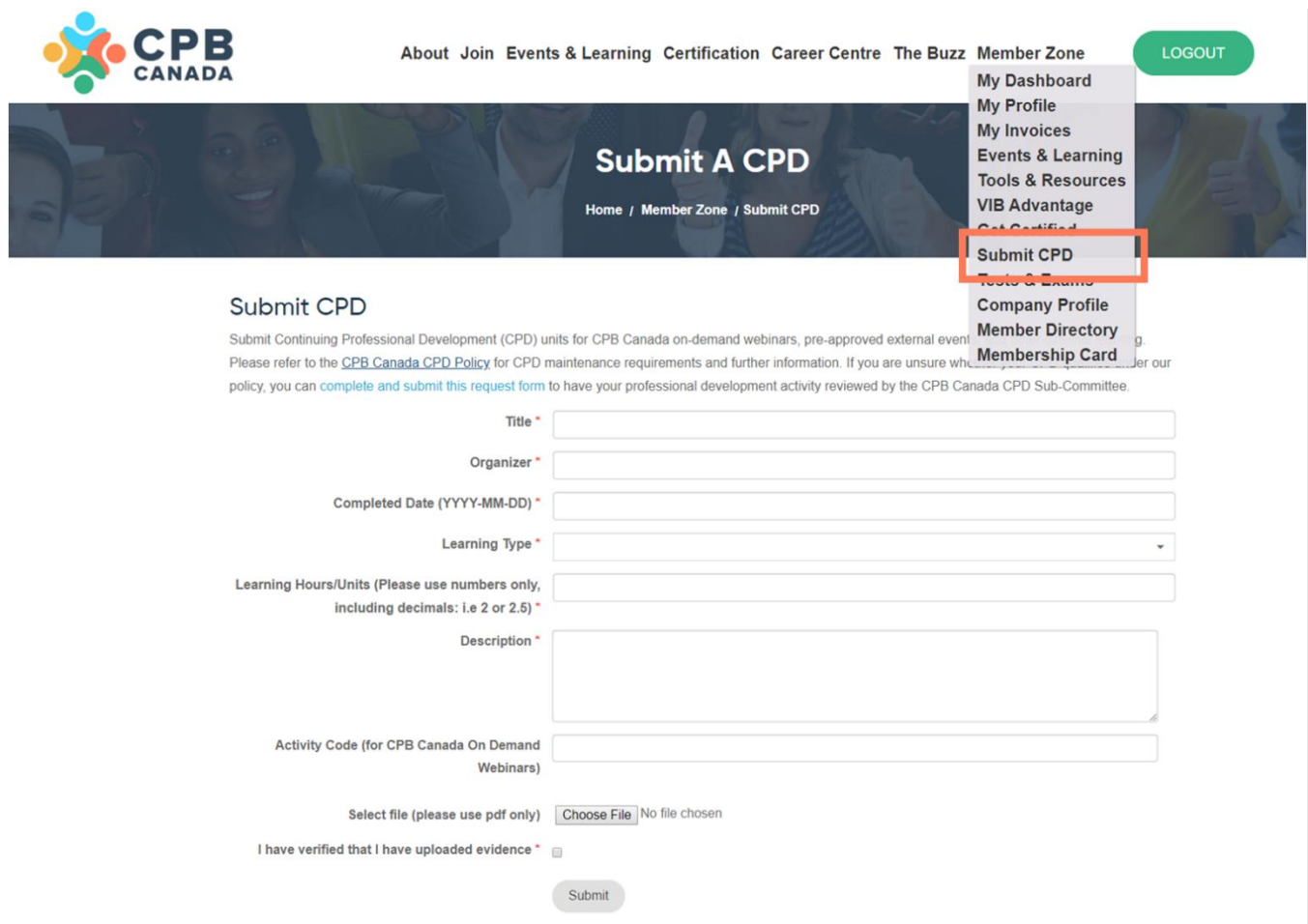
Activity	Credit Type	Credits	Date
+ All: Software Certification			

## Submit CPD Units

Members can submit Continuing Professional Development (CPD) units for CPB Canada on-demand webinars, pre-approved external events, and other external learning through the Member Zone.

Please refer to the CPB Canada CPD Policy for CPD maintenance requirements and further information, located in **Member Zone, Submit CPD**. If you are unsure whether your CPD qualifies under our policy, you can complete and submit a request form, located in **Member Zone, Submit CPD**, to have your professional development activity reviewed by the CPB Canada CPD Sub-Committee.

1. Click the green **Login** button on the CPB Canada website.
2. **Login** with your username and password.
3. Click **My Profile** in the Member Zone.
4. Click **Submit CPD**. Complete the form.
5. Click **Choose File** to upload you supporting evidence.
6. Check the  box to verify that you have uploaded your evidence or added your activity code.
7. Click **Submit**.



The screenshot shows the CPB Canada website interface. At the top left is the CPB Canada logo. The navigation menu includes: About, Join, Events & Learning, Certification, Career Centre, The Buzz, Member Zone, and a green LOGOUT button. The Member Zone dropdown menu is open, with 'Submit CPD' highlighted in a red box. Below the navigation is a banner for 'Submit A CPD' with the breadcrumb 'Home / Member Zone / Submit CPD'. The main content area is titled 'Submit CPD' and contains the following text: 'Submit Continuing Professional Development (CPD) units for CPB Canada on-demand webinars, pre-approved external events, and other external learning through the Member Zone. Please refer to the [CPB Canada CPD Policy](#) for CPD maintenance requirements and further information. If you are unsure whether your CPD qualifies under our policy, you can [complete and submit this request form](#) to have your professional development activity reviewed by the CPB Canada CPD Sub-Committee.'

The form fields are:

- Title \*
- Organizer \*
- Completed Date (YYYY-MM-DD) \*
- Learning Type \*
- Learning Hours/Units (Please use numbers only, including decimals: i.e 2 or 2.5) \*
- Description \*
- Activity Code (for CPB Canada On Demand Webinars)

Below the form is a file upload section: 'Select file (please use pdf only) Choose File No file chosen'. At the bottom, there is a checkbox 'I have verified that I have uploaded evidence' and a 'Submit' button.

## Access Digital Credentials

Members pursuing the certification pathway to CPB designation (Apprentice, Technician, CPB) are rewarded with a CPB Canada digital badge of achievement. Digital credentials are a great way to verify your experience, continuing professional development, and level of achievement with CPB Canada.

Each digital badge is an image backed by metadata detailing the requirements met for the level. This data is verified electronically and provides members, and the public, with proof that you have the knowledge expectations and experience that meet our national standard. In addition, members who successfully pass their CPB exam and receive their designation are provided with a certificate of achievement that can proudly be displayed.

Use your CPB Canada digital badge to:

- ✓ Showcase your level of achievement and skills to your professional network
- ✓ Enable employers and clients to quickly validate your knowledge and experience
- ✓ Share your digital badges on social media, resumes, online job banks, and email signatures

*Please note:* Members do not have a licence to use the CPB Canada logo. Apprentice, Technician, and CPB members will use their digital badge to display their level of achievement with CPB Canada. All other members can [access their CPB Canada membership card](#) through the Member Zone.

Learn more about digital credentials, including how to claim your digital credential, at <https://cpbcan.ca/certification/digital-badges.html>



## CPB Canada Digital Credentials (Coming June 26)

Members pursuing the certification pathway to CPB designation (Apprentice, Technician, CPB) are rewarded with a CPB Canada digital badge of achievement. Digital badges are a great way to verify your experience, continuing professional development, and level of achievement with CPB Canada.

### What Is A Digital Badge?

Each digital badge is an image backed by metadata detailing the requirements met for the level. This data is verified electronically and provides members, and the public, with proof that you have the [knowledge expectations and experience](#) that meet our national standard. In addition, members who successfully pass their CPB exam and receive their designation are provided with a certificate of achievement that can proudly be displayed.

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- Share your digital badges on social media, resumes, online job banks, and email signatures

Did you know that on average, LinkedIn members with certifications receive 6 times more views on their profile? We encourage our members to celebrate their achievements with their clients, employers, and networks by sharing their digital badge in their LinkedIn profile, email signature, and on their website.

### How To Claim Your Digital Badge?

When you earn your digital badge (Apprentice, Technician, CPB) you will receive an email from Acclaim (who run the [Credly platform](#)) letting you know how to claim your achievement badge. If you do not receive your email from Acclaim within 2 business days, please contact us at [info@cpbcan.ca](mailto:info@cpbcan.ca). Don't forget to check

## Add Digital Credentials to Your Business Cards

To add your digital credential to your business card:

1. Download your digital badge by [following these instructions](#)
2. Add the image file to your business card artwork
3. Under your badge, include the statement “Verify my credentials through:”
4. Ensure your social media or business website links are included on your business card so your badge can be verified online.



## ACCESS TESTS & EXAMS

To begin or continue your journey to CPB designation, including accessing the Apprentice and Technician level tests or the CPB exam, please see the [Access the Certification Pathway](#) section of this document. If you require access to retake a test or exam, please contact us at [info@cpbcan.ca](mailto:info@cpbcan.ca).

### Take the CPB Practice Exam

The CPB level exam is used to assess and validate an advanced level understanding of the more complex and challenging aspects of bookkeeping and business practices. The practice exam modules are designed to test your knowledge in each key category and prepare you for the CPB exam. Each module is comprised of 20 questions which would be similar in nature to the questions asked on the exam.

To access the CPB practice exams:

1. Click the green **Login** button on the CPB Canada website.
2. **Login** with your username and password.
3. Click **Tests & Exams** in the Member Zone.
4. Click **Get Started**.
5. Click the  box to purchase a bundle or to purchase individual exams
6. Click Purchase Now.
7. Complete the form in full. Click **Continue to Payment**.
8. Follow the instructions to finalize the payment.

The screenshot shows the CPB Canada website's 'Purchase Tests & Exams' page. The navigation menu includes 'About', 'Join', 'Events & Learning', 'Certification', 'Career Centre', 'The Buzz', 'Member Zone', and 'LOGOUT'. The 'Member Zone' dropdown menu is open, with 'Tests & Exams' highlighted. The main heading is 'Purchase Tests & Exams'. Below this, the page title is 'CPB Canada Practice Exams'. The text explains that the CPB level exam is used to assess and validate an advanced level understanding of bookkeeping and business practices. The page then displays a table of four exam bundles:

Bundle #1 Premium \$200 + Taxes	Bundle #2 Standard \$125 + Taxes	Bundle #3 Standard \$125 + Taxes	Individual Exams \$50 + Taxes
6 modules - accessible for 6 weeks	3 modules - accessible for 3 weeks	3 modules - accessible for 3 week	Individual modules - accessible for 1 week each
<ul style="list-style-type: none"> <li>• Accounts Payable &amp; Accounts Receivable</li> <li>• Inventory</li> <li>• Bookkeeping Knowledge</li> <li>• Payroll</li> <li>• Sales Tax</li> <li>• Period-End</li> </ul>	<ul style="list-style-type: none"> <li>• Accounts Payable &amp; Accounts Receivable</li> <li>• Inventory</li> <li>• Bookkeeping Knowledge</li> </ul>	<ul style="list-style-type: none"> <li>• Payroll</li> <li>• Sales Tax</li> <li>• Period End</li> </ul>	<ul style="list-style-type: none"> <li>• Payroll</li> <li>• Sales Tax</li> <li>• Period-End</li> <li>• Accounts Payable &amp; Accounts Receivable</li> <li>• Inventory</li> <li>• Bookkeeping Knowledge</li> </ul>
<a href="#">Get started!</a>	<a href="#">Get started!</a>	<a href="#">Get started!</a>	<a href="#">Get started!</a>

## VIEW MEMBERSHIP CARD

To view your membership card:

1. Click the green **Login** button on the CPB Canada website.
2. **Login** with your username and password.
3. Click **Membership Card** in the Member Zone.
4. Print the page to save a hard copy of your membership card.
5. Use the Print Screen or Screenshot options on your desktop or mobile device to save a digital copy of your membership card.

The screenshot displays the CPB Canada website interface. At the top left is the CPB Canada logo. The navigation menu includes: About, Join, Events & Learning, Certification, Career Centre, The Buzz, Member Zone, and a green LOGOUT button. The Member Zone dropdown menu is open, listing: My Dashboard, My Profile, My Invoices, Events & Learning, Tools & Resources, VIB Advantage, Get Certified, Submit CPD, Tests & Exams, Company Profile, Member Directory, and Membership Card (highlighted with a red box). Below the navigation is a banner for 'Membership Card' with the breadcrumb 'Home / Member Zone / Membership Card'. A sample membership card is shown below, featuring the CPB Canada logo and the following text: 'MEMBERSHIP CARD', 'This is to verify that Sample Member is a Certified member of CPB Canada', 'Member ID: 2050', 'Expiry Date: 2021-06-18', and 'www.CPBCAN.ca'.