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# CAPP CERTIFICATION GUIDE

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ACHIEVE THE GLOBAL STANDARD OF  
EXCELLENCE IN ACCOUNTS PAYABLE



Certified  
Accounts Payable  
Practitioner  
From IFOL



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Louise Varley, Purchase Ledger Manager

*"It's always good to go back to basics sometimes, hence why I was keen to start on the Foundation course (CAPS) and work my way up to the Practitioner course (CAPP)."*

*"Having a new team to manage can be difficult but with the knowledge that I am gaining, I will be the best manager for my team. I will also share this knowledge with my team so that we can grow together."*

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# CAPP: THE CERTIFIED ACCOUNTS PAYABLE PRACTITIONER PROGRAM

The Certified Accounts Payable Practitioner (CAPP) designation is a standard of excellence in the Accounts Payable profession.

**Accounts Payable – the beating heart of an organization’s finance department.**

Often referred to as Purchase Ledger or Payables, the Accounts Payable team are responsible for ensuring the timely payment of invoices from suppliers. Usually the AP team will also manage relationships with critical suppliers, ensuring the supply chain of goods and services to the business continues to flow.

As new technology is reducing the manual processes and data entry tasks, the role of an Accounts Payable professional is becoming highly specialized and complex, requiring ambitious, highly skilled and qualified professionals. This modern outlook provides greater responsibility, enhanced career prospects and greater earning potential.

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**EARN UP TO 22%  
MORE WITH THE  
CAPP CREDENTIAL**

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## 3 LEVELS OF CERTIFICATION

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### Certified Accounts Payable Specialist (CAPS)

Average completion in  
**4 Months**

Earning Potential  
**US \$22,000 – \$40,000**

### Certified Accounts Payable Manager (CAPM)

Average completion in  
**5 Months**

Earning Potential  
**US \$29,000 – \$54,000**

### Certified Accounts Payable Practitioner (CAPP)

Average completion in  
**9 Months**

Earning Potential  
**US \$30,000 – \$67,000**

\* Average salary data collected between 2018-2021





## Why CAPP

1

Gain a professional certification from an established and respected organization.

2

Learn practical, real-world skills needed by all businesses.

3

Boost your career prospects and earning potential.

4

The CAPP programme is open to all, regardless of age or experience.

5

Demonstrate your professional excellence to employers and colleagues with a certification and membership with The Institute of Financial Operations & Leadership.

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Certified  
Accounts Payable  
Practitioner  
From IFOL

# PROGRAM OVERVIEW



100%

Online learning and exam



Learn at your own pace

With videos, exercises and quizzes



18 months access

To our course library



30+

Hours of on-demand video classes



Global

Recognition and respect



Certificate

To verify your skills and knowledge

# STUDY CHART

	Accounts Payable Specialist (CAPS)	Accounts Payable Manager (CAPM)	Accounts Payable Practitioner (CAPP)
Hours of Materials	25+	25+	50+
Completion Time	3 Months	3 Months	3-6 Months
Modules	10	8	16
Units	55	40	89
Entry Criteria	None	3+ Years or CAPS	None



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# CERTIFIED ACCOUNTS PAYABLE SPECIALIST (CAPS)

The Certified Accounts Payable Practitioner (CAPP) course comprises of both the CAPS Foundation and CAPM Management elements. See below and page 5 for the program contents.

## 1. Welcome to the CAPP Certification Programme

- 1.1. Welcome
- 1.2. Join us and your Fellow Students on LinkedIn
- 1.3. Let's Get Started

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## 2. About You

- 2.1. Introduction
- 2.2. Let's Get to Know You

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## 3. The Accounts Payable Career Path

- 3.1. Module Focus and Objectives
- 3.2. Accounts Payable Role and Career
- 3.3. End of Chapter Reflection Question

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## 4. Customer Service Excellence and Stakeholder Management

- 4.1. Module Focus and Objectives
- 4.2. Measuring Customer Success
- 4.3. Measuring Success Task
- 4.4. Customer Service Brand and Journey
- 4.5. Customer Service Brand Actions Questions
- 4.6. Managing Customer Expectations
- 4.7. Handling Complaints and Moving to Solutions

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## 5. Accounts Payable Process and Policies

- 5.1. Module Focus and Objectives
- 5.2. Essential Accounting Terminology
- 5.3. Accounting Terminology Quiz

6..

- 5.4. Procurement and Procure to Pay
- 5.5. Invoice Processing and Handling Best Practices
- 5.6. Purchase Requisitions, Purchase Orders and Statement Reconciliations
- 5.7. Masterclass: How to Achieve Purchase Order Compliance
- 5.8. Paying and Transacting with Suppliers Using Procurement Cards
- 5.9. Fundamentals of Payment Management
- 5.10. Masterclass: Avoiding Payments Fraud in Accounts Payable
- 5.11. Effective Cash Management Practices
- 5.12. Reflection Exercise

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## 6. Suppliers

- 6.1. Module Focus and Objectives
- 6.2. Supplier Management from an AP Perspective
- 6.3. Fraud Prevention: Business Email Compromise
- 6.4. Supplier Master Files
- 6.5. Supplier Setup, Process and Practices
- 6.6. Supplier Portal Benefit Analysis
- 6.7. Verification And Maintenance with Checks and Controls
- 6.8. Fraud Prevention: Vendor Validation Masterclass
- 6.9. Building And Maintaining Relationships with Suppliers
- 6.10. Self-Reflection Exercise
- 6.11. Fraud Prevention: Segregation of Duties Masterclass

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**BOOK A DEMO**

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**READY TO ENROL**

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## 7. Technology in Finance

- 7.1. Module Focus and Objectives
- 7.2. AP Related Technology Platforms and Solutions
- 7.3. Improving AP Processes Using Technology
- 7.4. Digital Mail and Data Capture
- 7.5. Robotic Process Automation (RPA)
- 7.6. Masterclass: RPA and Redeploying the Workforce
- 7.7. Technology Solutions Task

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## 8. Travel and Entertainment Expenses

- 8.1. Module Focus and Objectives
- 8.2. Policies And Best Practices
- 8.3. Travel Management Solutions

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## 9. Internal Controls, Risk Management and Compliance

- 9.1. Module Focus and Objectives
- 9.2. Internal and Process Controls
- 9.3. Controls Identification Exercise
- 9.4. Managing and Reducing Risk

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## 10. Final Exam

- 10.1. Final Certification Exam

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# CERTIFIED ACCOUNTS PAYABLE MANAGER (CAPM)

A Certified Accounts Payable Manager is a Finance Professional with extensive knowledge of operational financial processes and manages the Accounts Payable function and or team who are responsible for onboarding and paying vendors who provide goods and services to their business. The CAPM designation demonstrates a high level of competency and knowledge in leading and effective management of an Accounts Payable function.

## 1. Welcome to the CAPM Certification Programme

- 1.1. Welcome
- 1.2. Your Dedicated Account Manager
- 1.3. Join us and Your Fellow Students on LinkedIn
- 1.4. Let's Get Started
- 1.5. Study Guide

## 2. Leading and Motivating the Accounts Payable Team

- 2.1. Module 1 Focus and Objectives
- 2.2. Leadership – Purpose, Styles and Skills
- 2.3. Motivation and Motivators
- 2.4. Change and Change Process
- 2.5. Coaching as a Leader
- 2.6. End of Module Assessment

## 3. Managing for High Performance

- 3.1. Module 2 Focus and Objectives
- 3.2. Management and Delegation
- 3.3. SMART Management
- 3.4. Challenging Actions
- 3.2. Managing for High Performance
- 3.3. End of Module Assessment

## 4. Developing Staff, Maximizing Performance

- 4.1. Module 3 Focus and Objectives
- 4.2. Develop Your Staff
- 4.3. Coaching and Learning
- 4.4. Staff Appraisals
- 4.5. Team Development Mindset
- 4.6. End of Module Assessment

## 5. Presenting with Impact

- 5.1. Module 4 Focus and Objectives
- 5.2. An Introduction to Presentations
- 5.3. Preparing Your Presentation
- 5.4. Delivery of Your Presentation
- 5.5. The Power of Your Voice
- 5.6. End of Module Assessment

## 6. KPIs For Business Performance

- 6.1. Module 5 Focus and Objectives
- 6.2. Key Performance Indicators
- 6.3. KPIs for Accounts Payable Teams
- 6.4. KPIs for Motivating Teams
- 6.5. End of Module Assessment

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## 7. Handling Complaints Successfully

- 7.1. Module 6 Focus and Objectives
- 7.2. The Complaints Handling Process
- 7.3. Complaints Guide
- 7.4. Understanding and Resolving Complaints
- 7.5. End of Module Assessment

## 8. Final Exam

- 8.1. Final Certification Exam



Stacy Adelubi, Accounts Payable and Receivable Manager

***"The CAPP programme gives me localised training in AP and further enhances my understanding as an AP Manager."***

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Emma Jayne – Accounts Payable Supervisor

*“I joined as a student member around 3 months ago and got straight into the Foundation course. The whole process was easy and I felt there was support whenever I needed it.*

*I’ve worked in AP for over 5 years now and I’m finding the Foundation course very thorough, going into detail in a lot of areas I’ve only really touched on in my job. I can’t wait to finish and see what the Manager course has to offer!”*





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## MASTERCLASSES

An engaging and interactive way to improve your knowledge and understanding of key areas in Financial Operations. Masterclasses are regular, live sessions delivered by our team of expert tutors who are able to share best practices and real world experience from their 20+ years experience of working in Finance. Each session provides attendees the opportunity to ask questions, take part in interactive polls and share points of view with the group.

Masterclass sessions are a complementary supplement to the CAPP and CP2P certification programs for the duration of your studies. Each live session is also recorded and added to our library of recorded masterclasses which can be accessed at your convenience for the duration of your studies.

After successfully achieving certification, you can continue to attend live and recorded masterclasses by becoming a member of the Continuous Learning Program from IFOL.

Find out more about the Continuous Learning Program at the IFOL website.

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## MASTERCLASS TUTOR BIOS

Meet our team of specialist tutors who bring a wealth of experience and expertise.



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**Caroline Adams**

### AP & P2P Trainer

**Key Skills:** Procure to Pay Cycle, Leadership, Process Improvement, Payments and Cash Management, Invoice Processing Best Practices, Transformation

Caroline is an experienced, passionate Shared Services Leader who has led Finance Teams through numerous transformations and unprecedented periods of change. Now working as an IFOL Trainer and Consultant helping companies with AP/P2P & Shared Services challenges, sharing knowledge and delivering best practice.

Caroline enjoys new challenges and thrives under pressure, able to draw on significant experience as a Senior Finance Manager and 'Head Of', with proven people management skills. Believing strongly that people are at the forefront of enabling and leading transformation and ensuring we drive future growth and success for our AP/P2P/Shared Services Teams.



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**Garry Stevens**

### AP & P2P Trainer

**Key Skills:** Cash Management, Process Improvement, Transformation, Fraud Prevention, Payments, E-invoicing

Garry Stevens has been involved in Finance in both Private and Public sector for over 40 years. For 25 years he served with Aberdeen City Council, the last 9 years as Financial Services Manager with one of his areas of responsibility being for Accounts Payable. He was tasked at the time of delivering a transformation project to deliver efficiencies and improvement in performance.

Over a three year period Garry delivered a best in class and award winning Accounts Payable team. Garry is passionate about Accounts Payable and the importance it plays in any organization in supporting its business, suppliers and local economy. Now working as a consultant, Garry specializes in assisting organizations to promote and develop Accounts Payable. Garry is keen to share his knowledge and pass this on to the next generation of Accounts Payable professionals.



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**Debra R Richardson, MBA, APM, APPM CPRS**

### Accounts Payable Trainer

**Key Skills:** Fraud Mitigation, Supplier Masterfile and Portals, 1099 Reporting, P2P Tools and Software, Supplier Management

Debra is an accounts payable speaker, consultant, and trainer with over 20 years of experience in AP, AR, general ledger, and financial reporting for Fortune 500 companies including Verizon, General Motors and Aramark

For ten years, Debra has focused on Global Vendor Maintenance, and implemented a vendor self-registration portal for 140k+ global vendors across five ERPs. In her consultancy, she focuses on authentication techniques, internal controls and best practices to prevent fraud in the vendor master file.

Debra now focuses on helping IFOL members and students improve their knowledge of the Accounts Payable process and protect the vendor master file from fraud.

# NEXT STEPS

Getting started – here’s what you need to do

## 1. Read this guide

Learn everything you need to know about the CAPP Certification program.

## 2. Choose the certification you would like to achieve

Select from CAPS, CAPM or the full CAPP program. If you’re not sure which level to choose, speak to a regional advisor.

## 3. Register and enrol

You can enrol directly online and get started immediately. Alternatively, if you require assistance or would like to discuss enrolment for a group, our advisors can help.

# READY TO ENROL



## Course fees

The CAPP certification course puts you in control with anytime access to online study materials and on-demand classes for one flat rate. You will also benefit from complementary access to three live masterclasses each month for the duration of your studies.

This traditional self-study model is all-inclusive, featuring:

- all required study materials
- access to online learning tools
- your examination
- private support groups
- live monthly classes
- pre-recorded classes.

All of the above is included for the duration of your studies at no additional charge.

# COURSE FEES

Single Payment	CAPS	CAPM	CAPP
USD	\$895	\$895	\$1495
GBP	£695	£695	£1199
Monthly Payment Plan	CAPS	CAPM	CAPP
USD	\$149 x 6 monthly payments	\$149 x 6 monthly payments	\$149 x 10 monthly payments
GBP	£119 x 6 monthly payments	£119 x 6 monthly payments	£119 x 10 monthly payments

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## WHERE OUR STUDENTS WORK



Sarah Thompson - Process Improvement Consultant, Oxygen Finance

*"Even though I was already experienced in AP and P2P, I wanted to become certified as I felt like it was an important part of my development."*

*The CAPP course has definitely increased my knowledge, and I'm able to provide an ever better service to my team and suppliers."*



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## ABOUT US

The Institute of Financial Operations & Leadership (IFOL) provides training, certification and support to a global community of Financial Operations professionals including P2P, Accounts Payable, Accounts Receivable, Payroll and Shared Services.

IFOL is a leader in research and education within Financial Operations and has a portfolio that includes ACAPP and CP2P certification programs and soon to include qualifications for Order to Cash, Payroll and Shared Services.

IFOL is a leader in research and education within Financial Operations and has a portfolio that includes CAPP (Accounts Payable Practitioners), CP2P (Procure to Pay Practitioner) and other specialist certification programs alongside continuous education programmes and learning resources.

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## OUR MISSION

To make learning and development accessible to all Financial Operations professionals

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## CORE VALUES

- ▶ PASSION
  - ▶ INTEGRITY
  - ▶ COMMUNITY
  - ▶ TEAMWORK
  - ▶ VISION
- 


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**30,000**  
Active  
Members

  
**7,000**  
Students

  
**22**  
Countries

  
**13**  
Courses &  
Qualifications

  
**99.8%**  
First time  
pass rate

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With headquarters in Florida, London and located regionally in Toronto, IFOL is the professional society committed to advancing the success of Financial Operations and Shared Services professional members and their organizations.

IFOL is 100% operated for the benefit of its members and our leadership team have over 20 years of finance, learning and development experience. Each year, IFOL hosts the most respected Financial Operations education and networking conferences in both North America and the United Kingdom.

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## GET IN TOUCH

For a bespoke proposal or further details  
about opportunities available, please contact us.

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