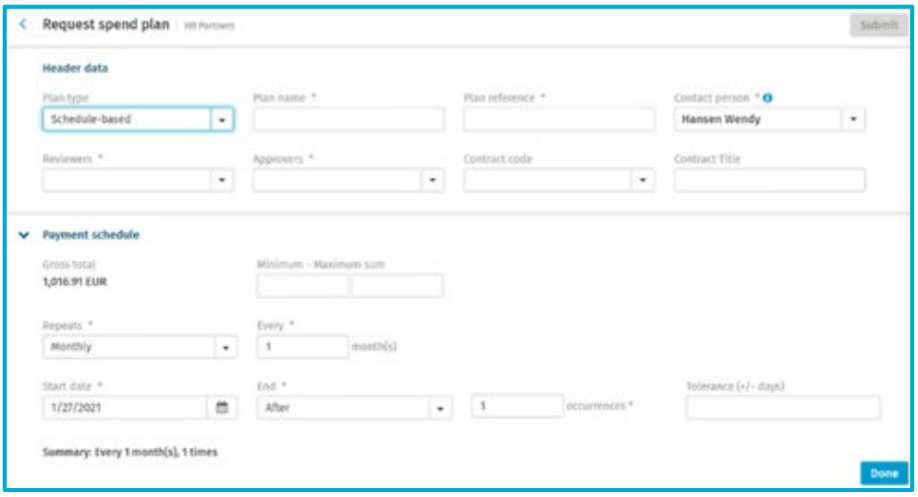
REQUESTING A SPEND PLAN FROM AN INVOICE

Invoice approvers and AP users can create a request for a spend plan when processing invoices. These recurring invoices can be automatically identified by both professional and personal users.

- When viewing the supplier's invoice, during the approval process or within AP Pro > Click **More options** > Select **Request spend plan**.
- Enter the required fields under the **Header data** section *(see Spend Plans Header Data)*



- Fill in the **Payment schedule**:
  - **Minimum – Maximum sum:** Invoice amounts (+/-) that are allowed to be paid. The minimum value must be greater than zero. The maximum sum must be greater than or equal to the gross total.
  - **Repeats:** The repeating of invoices received for this plan name. Options are daily, weekly, or monthly.
  - **Every:** "X" times per months, based on **Repeats**.
  - **Start date:** The default value is the current day of request.
  - **End:** Options available based on occurrences.
  - **Occurrences:** The "X" number of times that this plan will receive invoices.
  - **Tolerance:** The number of days (+/-) before or after the invoice is allowed to be received.
- Click **Done** > Preview the spend plan, edit, or delete data.
- Click **Submit** > Provide a comment for spend plan. > Click **Submit** again.

Note: You must fill in the **Coding** and **Header data** before you can create the spend plan request.