SPEND PLANS – CREATE A BUDGET-BASED PLAN

- In AP Pro, click **Spend plans**.
- Click **Create spend plan** > Select **Organization**, **Invoice type**, and **Budget-based** as the plan type > Click **Proceed**.
- Enter the required fields under the **Header data** section (see *Spend Plans Header Data*).
- Go to the **Invoices** tab on the bottom of the page > Click **Add first budget row** > Enter **Start Date, End Date, Budget, Maximum Number of Invoices,** and **Maximum Invoice Total**.

Start Date *	End Date *	Budget *	Maximum Number of Invoices	Maximum Invoice Total *		Actions
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- o **Start Date** & **End Date:** Fill these in based on the budget period.

- o **Budget:** Total sum of the invoices that can be automatically matched against the spend plan.

- o **Maximum Number of Invoices:** Define how many invoices can be automatically matched against the spend plan.

- o **Maximum Invoice Total:** The maximum sum of a single invoice that can be automatically matched against the spend plan.

- Click **Duplicate row** to add more rows to the plan.
- Click the **Attachments** tab > Attach any supporting documents to this spend plan.
- Go to the **Coding** section at the bottom of the page > Click **Add first coding row** > Fill in the required coding row fields.
- Click **Send to validation** for approval.

Note: The **Invoices** tab lists the invoices that have been matched to a budget-based plan. The invoice number acts as a link, enabling drilling into the invoice details.