

# Compeat Help

Home > Accounting > Accounts Payable > Recurring AP > Create and Schedule Recurring AP Batches

## Create and Schedule Recurring AP Batches

### Contents

[Create a Recurrence Schedule](#)

[Create Your Batch and Invoice Templates](#)

[Schedule Your Batch](#)

[Common Questions](#)

Recurring AP saves you and your team time when it comes to data entry, so it's important to understand exactly how the process works.

- » **Step 1:** Create a recurrence schedule for the batch. This tells Compeat how often to automatically generate the invoice batch.
- » **Step 2:** Create your batch and invoice templates.
- » **Step 3:** Schedule your batch by assigning a recurrence schedule.

## Create a Recurrence Schedule

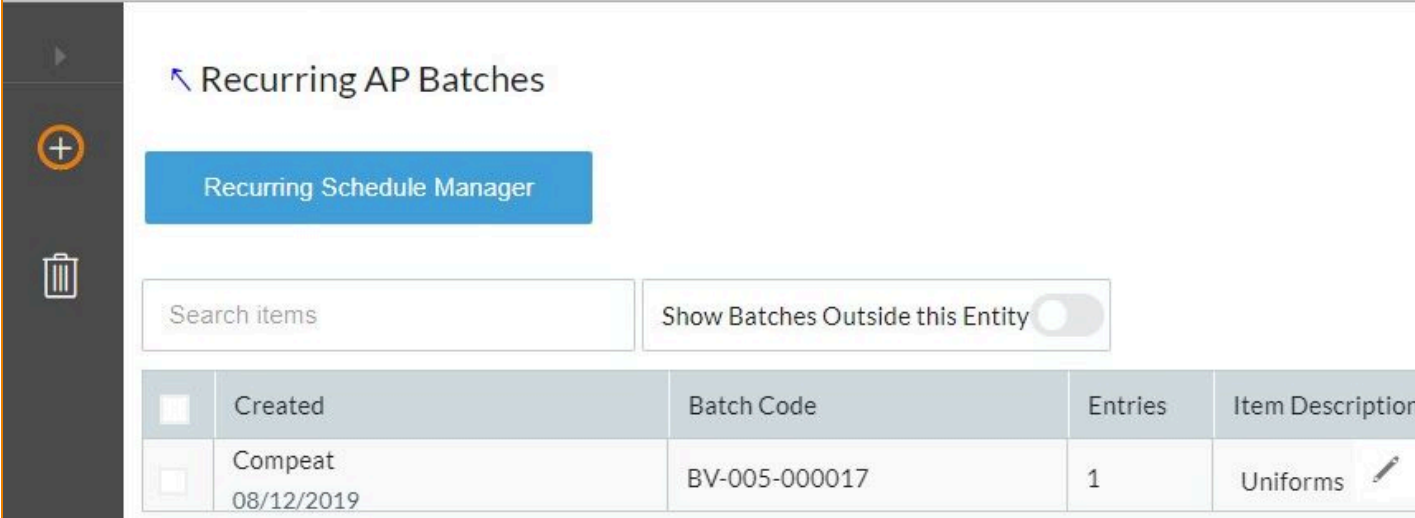
Compeat [Schedule Manager](#) allows you to quickly create a recurrence schedule that you can assign to one or more recurring batches.


You must create a recurrence schedule before you can assign that schedule to a batch. While you must initially assign a [schedule via the batch](#), future changes such as reassignment or removal can be done in the batch or through the [schedule](#) itself.

## Create Your Batch and Invoice Templates

If you've created an AP batch in Compeat before, then creating a recurring batch and invoice templates will look familiar to you. The two processes are near identical.

To create a recurring batch, navigate to **Accounts Payable > Recurring AP**.



	Created	Batch Code	Entries	Item Description
<input type="checkbox"/>	Compeat 08/12/2019	BV-005-000017	1	Uniforms 

- » **Continuing with an existing recurring AP batch?** Select the batch details to continue your work.
- » **Need to create a new recurring AP batch?** Select the plus sign icon on the left side of the page. Compeat marks new batches with **New** in the *Created* column. Locate your batch and select batch details to enter your first invoice.
- » **Want to add a reference?** Select the pencil icon in the *Item Description* field and enter your note. You can also maintain references from the batch.

Once in the batch, select **Add Voucher Template**.

Invoice templates differ slightly from standard invoices, but they still function the same. You can learn more about invoice and line item details by visiting our [Create Invoice Templates](#)

article.

Voucher Template V-005-0000078 ▾  
← PREV 1/1 NEXT → Save

**Voucher Template Info** ^

Vendor Name: CHEFUNIFORMS.COM  
Doc Type: Invoice  
Invoice Amount: 100

Doc Notes: Shirts x 10

Export to Excel

Columns

<input type="checkbox"/>	Item Description	GL Account #	GL Account Desc	Quantity	Purchase Unit	Amount Each	Ext Price
<input type="checkbox"/>	UNIFORMS T-Shirt	8020-000	Rest Op-Uniforms	10	EACH=1/Each	\$10,000	\$100.00

As with standard invoice batches, how many invoices you choose to include in a batch is up to you and how your company processes invoices.

**!** It's important to note that all invoices in a single batch share the same recurrence schedule. If invoices require different schedules, they will need to be separated into different batches with their unique schedule assigned.

## Schedule Your Batch

How many invoice templates you choose to include in a batch depends on your operation and how you plan to schedule the recurring batch.

As noted above, it's important to know that you assign a recurrence schedule at the batch level, meaning all invoices within that batch will automatically generate based on that schedule.

If invoices require a different schedule, they will need to be in separate batches with the necessary schedule assigned to each corresponding batch.

Recurring Batch BV-001-003610

"Non-Recurring Uniform Template" | Batch is unscheduled.

[Schedule Batch](#)

Search items

<input type="checkbox"/>	Vendor Name	Doc Type	Voucher #	Invoice Amt	Non-Disc Amt
<input type="checkbox"/>	CHEFUNIFORMS.COM	Invoice	V-001-0016076	\$100.00	\$0.00

From the batch page, select **Schedule Batch**. This launches the *Schedule Batch* pop-up. From here, you can assign a recurrence schedule *or* create a new one.

### Schedule Batch

Select a schedule to assign to recurring batch BV-001-003610, or open [Recurring Schedule Manager](#) for more options.

Search items

<input type="checkbox"/>	Schedule Name	Recurrence Pattern	Appearance	End	Associated Batches
<input type="checkbox"/>	1A Monthly Day	Effective on the 6th day of every 3	5 days in advance	After 1 occurrences.	6 batches
<input checked="" type="checkbox"/>	1A Weekly	Effective every 4 weeks on Tuesda	On Apply Date	No end	4 batches
<input type="checkbox"/>	1A Yearly Every	Effective every March 9th.	2 days in advance	No end	
<input type="checkbox"/>	1A Yearly The	Effective on the last Friday undefin	On Apply Date	After 2 occurrences.	
<input type="checkbox"/>	1st day of Period	Effective on the first day of every 1	On Apply Date	No end	998 - FV Monthly Disbursement

1 selected / 105 total

[Cancel](#)
[Create & Assign](#)
[Assign Schedule](#)

- » **See your schedule?** Select the schedule you wish to assign the batch, then select *Assign Schedule*.
- » **Need to create a new schedule?** If you haven't already created a recurrence schedule, you can skip selection and choose *Create & Assign*. This launches the **Create Schedule** wizard where you can enter desired details for the schedule.

## Common Questions

You likely have additional questions about recurring AP batches. We answer some below, but if you don't see your question, feel free to [email us](#).

▼ **Where can I find my batch once it recurs?**

▼ **What if I need to make changes to a recurring batch?**

Updated on March 9, 2021

