



Pegasys Quick Reference Guide

Create a Chain by Copying a Previous Chain

1. Open the **Lease Profile**.
2. Select the **Document Chains** tab.

Figure 1: Document Chains Tab

The screenshot shows the Pegasys web application interface for the 'Document Chains' tab. The breadcrumb trail is 'Pegasys / Reference / Document / Lease Profiles / Lease Info: 183G70016 / Document Chains'. The 'Document Chains' sub-tab is active. Below the breadcrumb trail are navigation links: 'Document Chain', 'Vendors', 'Amounts', 'Document Templates', 'Suspend Schedules', and 'Unsuspend Schedules'. The main content area displays a table with 1 result. The table has columns for 'Document Chain Number', 'Status', 'Suspended', 'Generate Past Forms', and 'Funding Level'. The single row shows '1', 'Inactive', 'False', 'True', and 'Header Accounting'. Below the table are 'Add', 'Copy', and 'Remove' buttons. The bottom right corner shows '10 per page' and 'Page 1 of 1'. A 'Go to top of page' link is at the bottom left.

Document Chain Number	Status	Suspended	Generate Past Forms	Funding Level
1	Inactive	False	True	Header Accounting

3. Select the previous chain.
4. Select **Copy**.
5. Select the **Document Templates** tab.

Figure 2: Document Templates Tab

The screenshot shows the Pegasys web application interface for the 'Document Templates' tab. The breadcrumb trail is 'Pegasys / Reference / Document / Lease Profiles / Lease Info: 183G70016 / Document Chains: 2 / Document Templates'. The 'Document Templates' sub-tab is active. Below the breadcrumb trail are navigation links: 'Document Chain', 'Vendors', 'Amounts', 'Document Templates', 'Suspend Schedules', and 'Unsuspend Schedules'. The main content area displays a table with 1 result. The table has columns for 'Record Number', 'Document Type', 'Final Last Reference', and 'Referenced Record Number'. The single row shows '1', 'RO', 'False', and '0'. Below the table are 'Add', 'Copy', and 'Remove' buttons. The bottom right corner shows '10 per page' and 'Page 1 of 1'. A 'Go to top of page' link is at the bottom left.

Record Number	Document Type	Final Last Reference	Referenced Record Number
1	RO	False	0

6. Select the payment record.
7. Select the **Document Template** link.
8. Select **Template**.



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Figure 3: Document Template

Pegasys / Transactions / Purchasing / New / Order / Lease Info: 1B3G70016 / Document Chains: 2 / Document Templates: / Document Template

Lease Info | Document Chains

Document Chain | Vendors | Amounts | Document Templates | Suspend Schedules | Unsuspend Schedules

Document Template | Frequencies | Schedules

General

* Document Type: RO ☆

First Creation Date: 08/27/2013 🗓

Status: Inactive ▾

Template

Copy Fwd From Template Record

Referred Record Number: 0

Final Last Reference

Payment Template Prompt Pay Information

Periodic Payments Subject to Prompt Pay

Retroactive Payments Subject to Prompt Pay

Specific Periodic Payments Prompt Pay Type: ☆

Specific Retroactive Payments Prompt Pay Type: ☆

[Go to top of page](#)

Save

9. Select **Finish**.

a. The Header page of the Payment Form will display.

10. Review the Vendor Information section to ensure that the appropriate vendor codes are displayed.

11. Select the **Header Accounting Lines** tab.

12. Select **Add** to add the new accounting line on the payment form.

Figure 4: Add Header Accounting Line

Pegasys / Transactions / Purchasing / New / Order / Lease Info / Header: RO PBS Recurring Contracts Order 1B3G70016-2-1 RECURRING FULL FORM / Header Accounting Lines

Header | Fixed Assets | Office Addresses | Credit Cards | Header Accounting Lines | Navigation Vendor History

Header Accounting Line | Tax Lines

No results

Line Number	Amount	Transaction Type	Accounting Template	BBFY	EBFY	Fund	Reg	Org Cd	Prgm	Proj Cd	Acty	SOC	Bldg #	Sys	Veh Tag #
Total Header Funded Amou															

References... **Add** Copy Remove

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13. Enter the **Lease Code** in the **Invoice Number** field.

14. Enter or search for a template for the accounting line in the **Accounting Dimensions** box.

Add accounting elements that are required but not populated by the accounting dimension template, including activity, SOC, Lease #, and Bldg #.



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15. Select **Verify**.
16. Select **Save Template**.
17. Select **Close Template** to return to the Lease Profile.