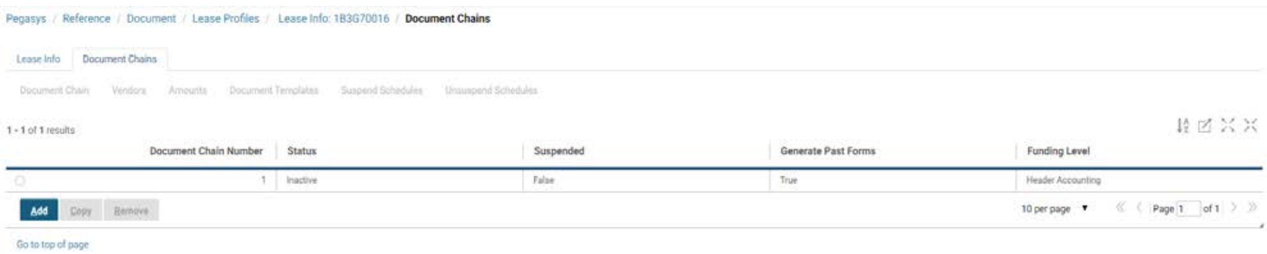
Pegasys Quick Reference Guide

Create a Chain by Copying a Previous Chain

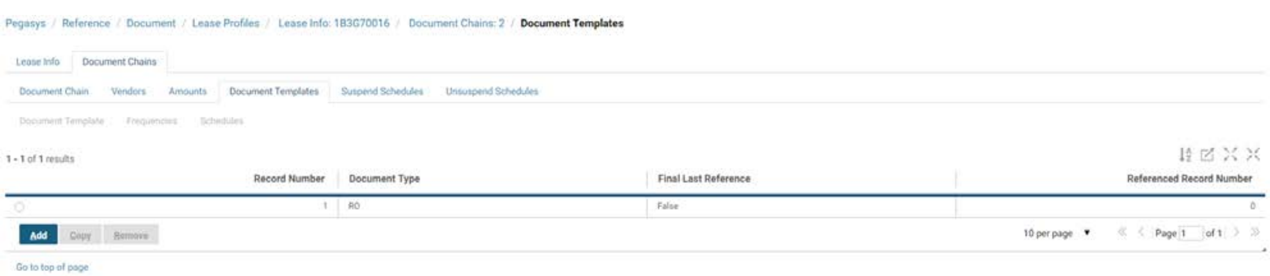
1. Open the **Lease Profile**.
2. Select the **Document Chains** tab.

Figure 1: Document Chains Tab



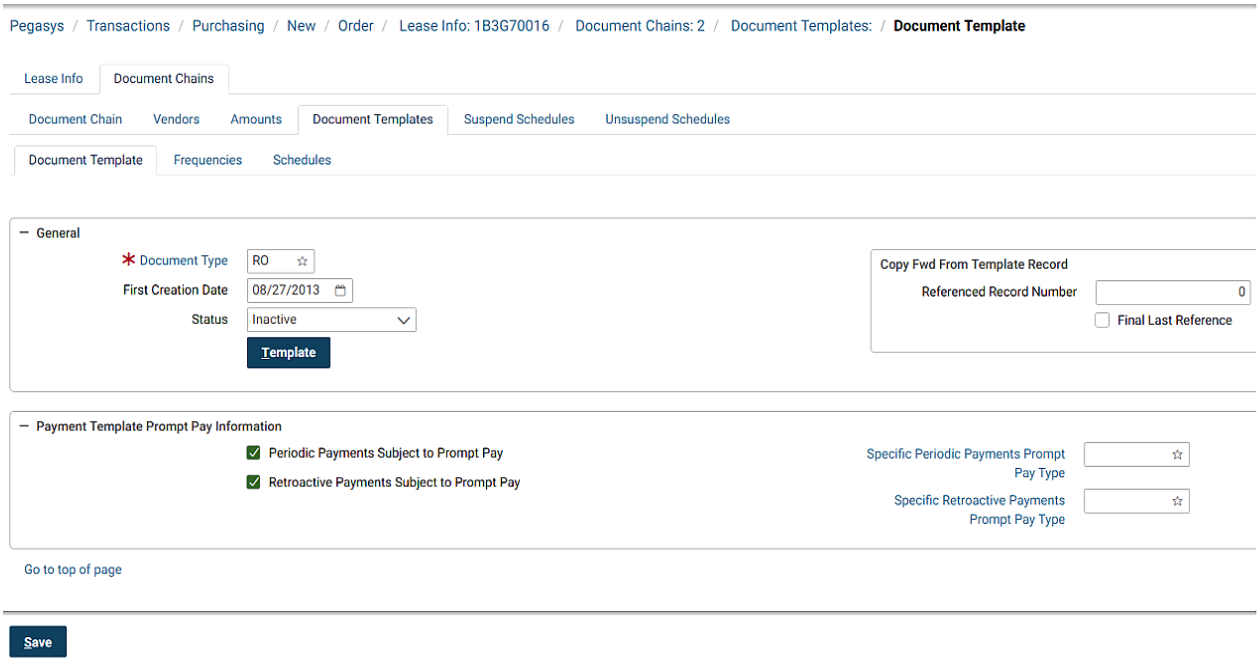
3. Select the previous chain.
4. Select **Copy**.
5. Select the **Document Templates** tab.

Figure 2: Document Templates Tab



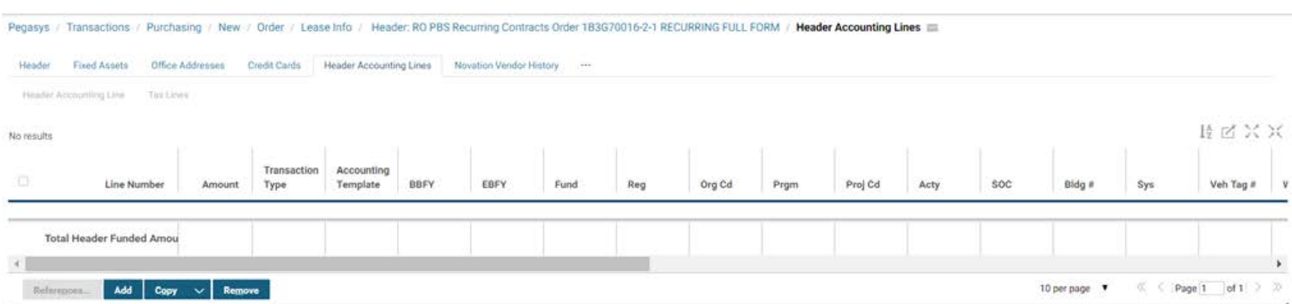
6. Select the payment record.
7. Select the **Document Template** link.
8. Select **Template**.

Figure 3: Document Template



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



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 #.

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