



Pegasys Quick Reference Guide

BLANKET PURCHASE AGREEMENTS: INTRO

- Blanket purchase agreements (BPA) are pre-negotiated agreements between GSA and vendors. To track spending against a BPA, the BPA number and its terms and conditions must be entered on the **Blanket Agreement Maintenance** table. Purchase requests are used to establish the BPA in Pegasys and include:
 - **BL-BPA with Limitations** - BPA that commits funding and reduces the budget's availability.
 - **BP-BPA without Limitations** - BPA that does not reduce the budget's available balance.
- These purchase requests are similar in function to the GSA Form 300/GSA Form 3521.
- Fields with red asterisks (*) are mandatory for Pegasys processes, but may not include all fields required by GSA policy.

GSA Policy

- The roles of Requisitioner, Direct Payer and Contracting Officers have the authority to update the **Blanket Agreement Maintenance** table.
- BPAs with limitations require Account Classification, Funds Authorization and Manager Approvals.
- If the BPA is \$3,000 or more, an Authorized Buyer's approval is required. If the BPA is more than \$3,000, a Contracting Officer's approval is required.
- BPAs without limitations do not require approvals.
- GSA will not use the **Update Blanket Agreement** feature on the BPA documents.

Blanket Purchase Agreements: Creating BPA Limitations

1. Select **Transactions** → **Purchasing** → **New** → **Request** from the Pegasys menu bar.
2. Enter **BL** into the **Document Type** field.
3. Select **Generate**.
4. Select **Finish**.



Pegasys Quick Reference Guide

Figure 1: New Request Page

Pegasys / Transactions / Purchasing / New / **New Request**

New Request

* Document Type: BL BPA with Limitations

Document Number Format Prefix: []

Document Number Format Team: []

Security Org: []

* Document Number: BL20180219000 **Generate**

Title: []

Copy Document: None Copy From Copy Forward

File: [] **Browse...**

[Go to top of page](#)

[< Back](#) **Finish** **Cancel**

5. Complete the **Authorized By** field.

NOTE: The Request Date, Accounting Period and Reporting Accounting Period fields default when the form is verified or processed.

Figure 2: Header Tab

Header Office Addresses Credit Cards Suggested Vendors Header Accounting Lines Itemized Lines ...

— General

Document Type	BL BPA with Limitations	Request Date	[]
Status	NEW	Accounting Period	[]
Document Number	BL20180219000	Reporting Accounting Period	[]
Number Description	[]	Batch Number	[]
Title	[]	Document Classification	[]
Authorized By	[]	Security Org	GSA
Agency DUNS Number	[]	<input type="checkbox"/> Suppress Printing	
Agency DUNS+4	[]		

6. Enter the **Vendor Code** applicable to the BPA in the Vendor Information group box.



Pegasys Quick Reference Guide

Figure 3: Vendor Information Section

– Vendor Information

Vendor

Vendor ☆ ☆ [More](#)

Address Name

Customer Account ☆

7. Enter a **Blanket Agreement Number** in the Contracts Information group box.
 - a. If unknown, select the **Blanket Agreement Number** link.

Figure 4: Contracts Section

– Contracts

Contracts Number	<input type="text"/> ☆	View Contract / Blanket Agreement
Blanket Agreement Number	<input type="text"/> ☆	Default Contract / Blanket Agreement To Lines
Delivery Order Number	<input type="text"/> ☆	Suggested Preference Program <input type="text"/>
Schedule Number	<input type="text"/>	Suggested Type Of Contracts <input type="text"/> ☆
Start Date	<input type="text"/> 📅	Min Guarantee Award Quantity % <input type="text"/>
End Date	<input type="text"/> 📅	Min Guarantee Award Quantity <input type="text"/>
Procurement Plan Number	<input type="text"/>	Max Ceiling Award Quantity <input type="text"/>
Type of Action	<input type="text"/> ▾	Min Guarantee Award Amount % <input type="text"/>
Priority	<input type="text"/> ▾	Min Guarantee Award Amount <input type="text"/>
Priority Rating	<input type="text"/> ▾	Minimum Quantity <input type="text"/>
	<input type="checkbox"/> Update Blanket Agreement	
Primary NAICS	<input type="text"/> ☆	
Estimated Contract Value Amount	<input type="text"/> \$0.00	

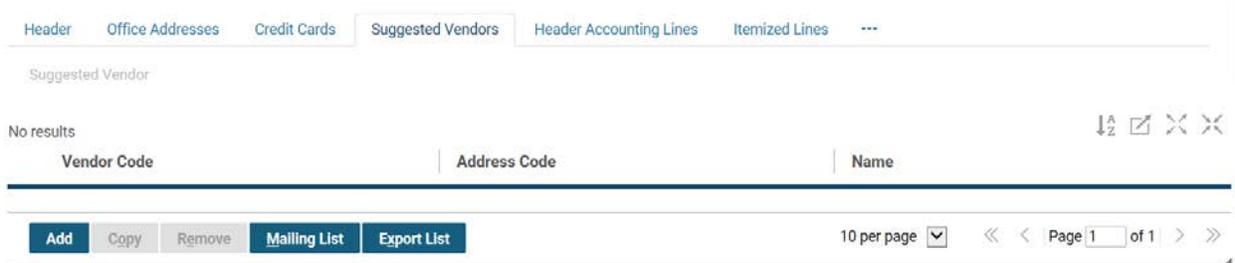
The Search-Blanket Agreement page will display.

- b. Enter the appropriate **Search Criteria**, and select the **Search** button.
 - c. Select the appropriate agreement, and select the corresponding **Select** button.
8. Select the **Suggested Vendors** tab.
9. Select **Add** to enter the address code, which is associated with the remit to vendor address. (This information prints on the GSA Form 300/GSA Form 3521.)



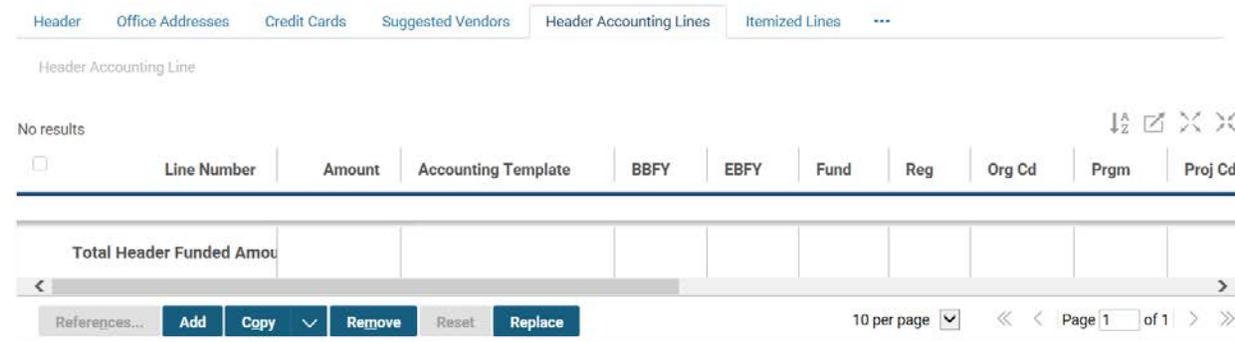
Pegasys Quick Reference Guide

Figure 5: Suggested Vendors Table



- 10. Select **Code** to search for the vendor.
- 11. Select the **Header Accounting Lines** link.
- 12. Select **Add**.

Figure 6: Header Accounting Lines Tab



- 13. Enter the requested amount of the BPA in the **Requested Line Amount** field.

Figure 7: Line Amounts Section

— Line Amounts

	Current Amount
Requested	\$0.00
Applied Credit	\$0.00
Net Total	\$0.00

- 14. Select the **Template** link.



Pegasys Quick Reference Guide

Figure 8: Accounting Dimensions Section

Accounting Dimensions

* Template ☆ Default

* BBFY > EBFY > * Fund ☆ Region ☆ Org Code

- a. Enter the appropriate **Search Criteria**, and select the **Search** button.
 - b. Select the appropriate template, and select the corresponding **Select** button.
 - c. You will be returned to the **Header Accounting Line** page.
15. Enter any other required accounting elements.
 16. Populate the **Agreement** field with a referenced **RWA** or **IBAA** number, if applicable.

Figure 9: Agreement Section

Agreement

Agreement Number ☆ Agreement Line Number

17. Enter a **Description**. (This information prints on the GSA Form 300/GSA Form 3521.)
18. Select the **Header Accounting Lines** link to return.
 - a. New lines can be entered by repeating steps 12-17.
 - b. A line can be copied by selecting the desired **accounting line**, selecting **Copy**, selecting the **new line** and selecting the **Header Accounting Line** link to apply any changes.
 - c. A line can be deleted by selecting the desired **accounting line** and selecting **Remove**.
 - d. A line can be modified by selecting the desired **accounting line** and selecting the **Header Accounting Line** link (opening the Header Accounting Line to make any needed changes).
19. Select the **Approval Routing tab**, and add the appropriate approvers individually or via a routing list.

Figure 10: Approval Routing Tab

Header Office Addresses Credit Cards Suggested Vendors Header Accounting Lines Approval Routing ...

No results ⌵ ⌴ ⌶ ⌷

<input type="checkbox"/>	Approver Name	Approver Id

10 per page 1 of 1

Add Routing List
Add User
Remove



Pegasys Quick Reference Guide

20. Select **Save**.
21. Choose **Verify** to display any errors.
 - a. If necessary, correct the errors and select to **Verify** again.
22. Select **Submit**.

Blanket Purchase Agreements: Creating a BPA - No Limitations

1. Select **Transactions** → **Purchasing** → **New** → **Request** from the Pegasys menu bar.
2. Enter **BP** into the **Document Type** field.
3. Select **Generate**.
4. Select **Finish**.

Figure 11: New Request Page (continued)

Pegasys / Transactions / Purchasing / New / **New Request** 

New Request

* Document Type 

Document Number Format Prefix 

Document Number Format Team 

Security Org 

* Document Number

Title

Copy Document None
 Copy From
 Copy Forward

File

5. Complete the **Authorized By** field.

NOTE: The Request Date, Accounting Period, and Reporting Accounting Period fields default when the form is verified or processed.



Pegasys Quick Reference Guide

Figure 12: Header Tab (continued)

Header Office Addresses Credit Cards Suggested Vendors Header Accounting Lines Itemized Lines ...

General

Document Type

Status

Document Number

Number Description

Title

Authorized By

Agency DUNS Number

Agency DUNS+4

Request Date

Accounting Period

Reporting Accounting Period

Batch Number

Document Classification

Security Org

Suppress Printing

6. Enter the **Vendor Code** applicable to the BPA.
7. Enter a **Blanket Agreement Number** in the Contracts Information group box.

Figure 13: Contracts Tab (continued)

Contracts

Contracts Number

Blanket Agreement Number

Delivery Order Number

Schedule Number

Start Date

End Date

Procurement Plan Number

Type of Action

Priority

Priority Rating

Update Blanket Agreement

Primary NAICS

Estimated Contract Value Amount

[View Contract / Blanket Agreement](#)

[Default Contract / Blanket Agreement To Lines](#)

Suggested Preference Program

Suggested Type Of Contracts

Min Guarantee Award Quantity %

Min Guarantee Award Quantity

Max Ceiling Award Quantity

Min Guarantee Award Amount %

Min Guarantee Award Amount

Minimum Quantity

Maximum Quantity

- a. If unknown, select the **Blanket Agreement Number** link.
 - i. The Search-Blanket Agreement page will display.
 - b. Enter the appropriate **Search Criteria** and select the **Search** button.
 - c. Select the appropriate agreement, and select the corresponding **Select** button.
8. Select the Suggested Vendors tab.



Pegasys Quick Reference Guide

9. Select **Add** to enter the address code, which is associated with the remit to vendor address. (This information prints on the GSA Form 300/GSA Form 3521.)

Figure 14: Suggested Vendors tab (continued)

10. Select the **Vendor** hyperlink to search for the vendor.

Figure 15: Vendor Section (continued)

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

Figure 16: Item Collection (continued)

13. In the Line Amounts group box, enter the requested amount of the BPA in the **Requested** field.



Pegasys Quick Reference Guide

Figure 17: Line Amounts (continued)

— Line Amounts

	Current Amount
Requested	\$0.00
Applied Credit	\$0.00
Net Total	\$0.00

14. Select the **Template** link.

Figure 18: Accounting Dimensions (continued)

— Accounting Dimensions

Template ☆ Default

* BBFY	EBFY	* Fund	Region	Org Code
<input type="text"/> >	<input type="text"/> >	<input type="text"/> ☆	<input type="text"/> ☆	<input type="text"/>

- a. Enter the appropriate **Search Criteria**, and select the **Search** button.
- b. Select the appropriate template, and select the corresponding **Select** button.
- c. You will return to the **Header Accounting Line** page.

15. Enter 'ZZZ' in the **Sub-Object Class** field.

Figure 19: Accounting Dimensions Complete

* BBFY	EBFY	* Fund	Region	Org Code	Program
<input type="text"/> >	<input type="text"/> >	<input type="text"/> ☆	<input type="text"/> ☆	<input type="text"/> ☆	<input type="text"/> ☆
Project Code	Activity	* Sub-Object Class	Building #	Location/System	Vehicle Tag #
<input type="text"/> ☆					
Work Item	Lease #	Cost Organization	YBA	BETC	Cohort Yr
<input type="text"/> ☆	<input type="text"/> ☆	<input type="text"/> ☆	<input type="text"/> >	<input type="text"/> ☆	<input type="text"/> >
PRC					
<input type="text"/> ☆					

16. The accounting strip information does **not** print on the GSA Form 300/GSA Form 3521.

Enter any other required accounting elements in the **Accounting Dimensions** group box.

17. Populate the **Agreement** field with a referenced **RWA** or **IBAA** number, if applicable.



Pegasys Quick Reference Guide

Figure 20: Agreement Section (continued)

— Agreement

Agreement Number ☆

Agreement Line Number

18. Enter a **Description**. (This information prints on the GSA Form 300/GSA Form 3521.)
19. Leave the dollar amount in the **Requested** field as '\$0.00'. (This information does not print on the GSA Form 300/GSA Form 3521.)
20. Return to the Header Accounting Lines page by selecting on the Header Accounting Lines link.

Figure 21: Available Tabs - Header Accounting Lines

Header Office Addresses Credit Cards Suggested Vendors **Header Accounting Lines** Itemized Lines ...

Header Accounting Line

21. Select the **Approval Routing** tab, and add the appropriate approvers individually or via a routing list.

Figure 22: Available Tabs - Approval Routing

Header Office Addresses Credit Cards Suggested Vendors Header Accounting Lines **Approval Routing** ...

22. Select **Save**.
23. Select **Verify** to display any errors.
 - a. If necessary, correct the errors and select Verify again.
24. Select **Submit**.

Figure 23: Action Buttons

Pegasys / Transactions / Purchasing / New / Request / Header: BP BPA

Verify **Save** **Submit** **Schedule** Refresh **Fund Currency** ...