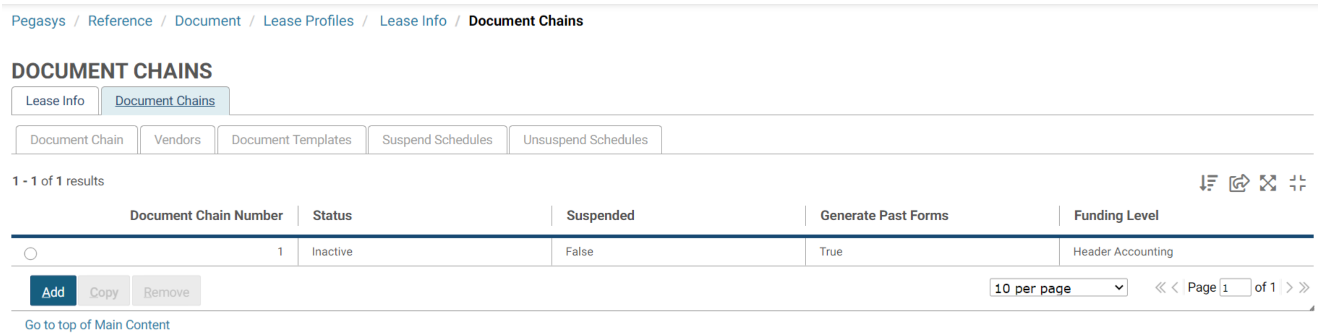
Pegasys Quick Reference Guide

Create a Chain by Copying a Previous Chain

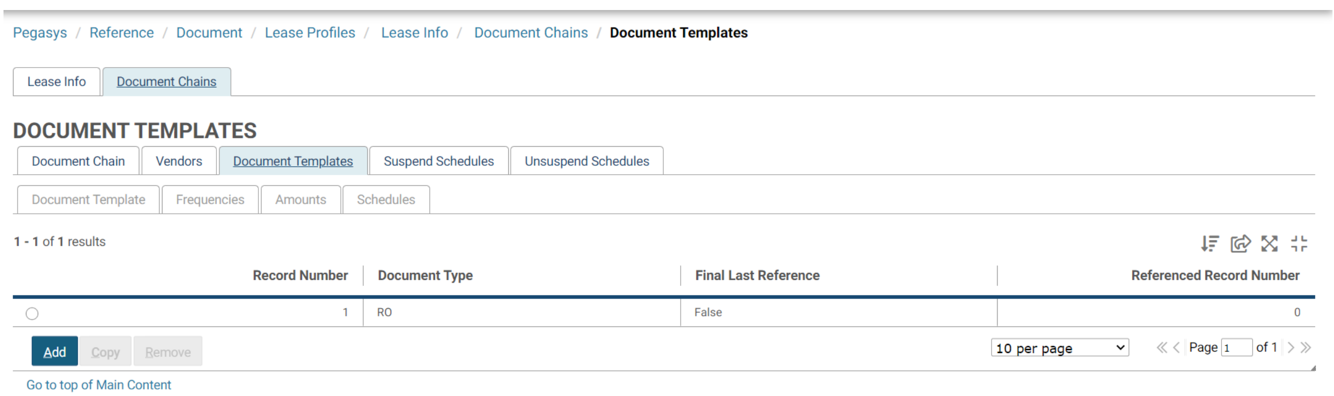
1. Open the **Lease Profile**.
2. Select the **Document Chains** tab.

Figure 1: Document Chains Tab



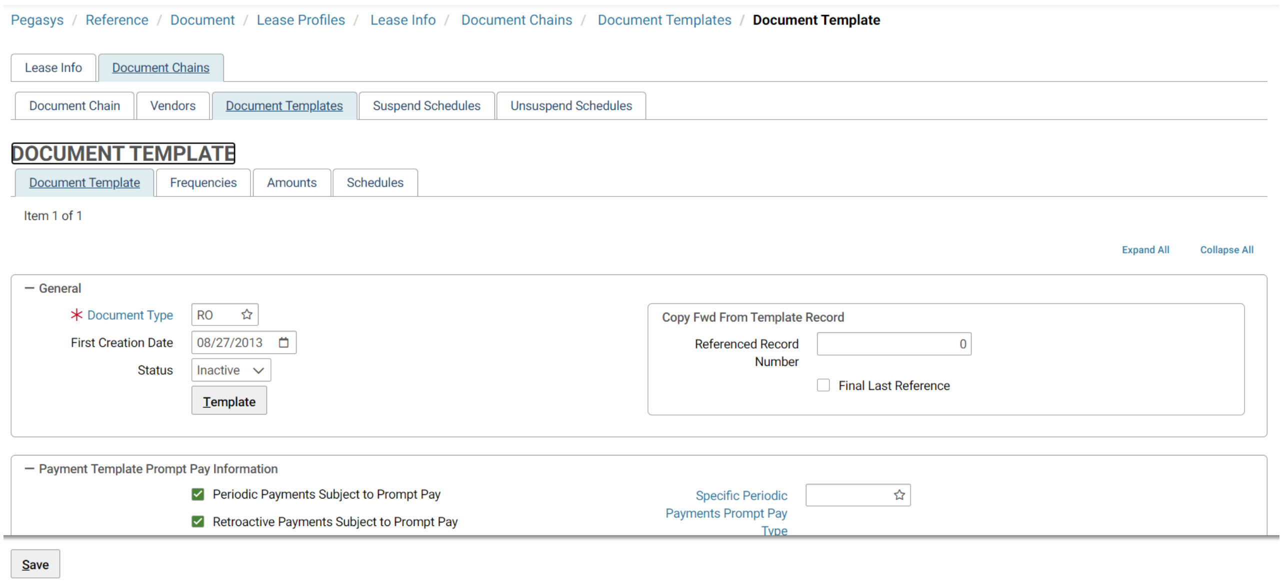
3. Select the previous chain.
4. Select **Copy**.
5. Select the **Document Templates** tab.

Figure 2: Document Templates Tab



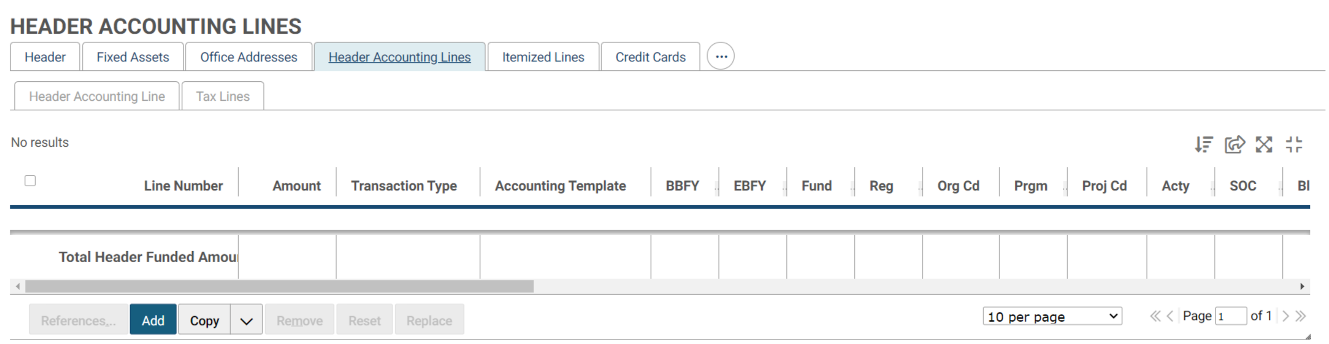
6. Select the payment record.
7. Select the **Document Template** link.
8. Select **Template**.

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 #.

NOTE: Downstream Document Templates may have generic Document Reference information populated. Do not delete this generic Document Reference data unless an actual Document Number that exists outside of the Lease module needs to be referenced.

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