



Pegasys Quick Reference Guides

Create a New Lease Profile for Leases Paid Monthly

1. From the Pegasys menu bar, select **Reference** → **Document** → **Lease Profiles**.
2. Select **New**.

Figure 1: Search Lease Profile

Search - Lease Profile

Search Criteria

Code

Name

Short Name

Status

Security Org

Effective Dates

From Date

To Date

No results

Code	Name	Short Name	Status	Start Date	End Date	Security Org
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3. Enter the **Lease Code** in the **Code** field.
4. Enter the **Lease Name** in the **Name** field.
5. Enter property identification information in the **Short Name Field**.
6. Enter **GSA** in the **Security Org** field.
7. Allow the **Neither** option in the **Creation Details** drop-down list box to default.
8. In the Effective Dates group box, enter or select on the **From Date** and **To Date** fields to select the dates the lease profile should begin and end.
9. Select the **Document Chains** tab to display.



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Figure 2: Lease Info Page

10. Select **Add** and the Document Chains page will display.

Figure 3: Document Chains Tab

- 11. Select the **Generate Past Forms** checkbox.
- 12. Select the **Vendors** tab.
- 13. Select **Add** and the Vendors page will display.

Figure 4: Vendors Tab

14. Enter the **Change Effective Date**.



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15. Enter or search for the **Vendor Code**.

- a. To search for the Vendor Code, select the **Code** hyperlink to search for a vendor. The Search - Vendor Code page displays. Enter the applicable search criteria and select **Search**.
- b. Find the appropriate vendor record, and select the corresponding **Select** button. The Vendor Name field will populate from the Vendor Code that is selected.

16. Enter or search for the **address code** in the **Remit To** field.

17. Enter or search for the **vendor code** in the **Designated Agent** field, if necessary.

Figure 5: Vendors Page

Lease Info | Document Chains

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

Vendor

Item 1 of 1

* Change Effective Date

Currency

— Vendor Information

Vendor

Vendor ☆ ☆

Address Name

* Remit To Address ☆

Designated Agent

Vendor ☆

Address Name

18. Select the **Document Templates** tab.

19. Select the **Add** button.



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Figure 6: New Document Template Page

Pegasys / Reference / Document / Lease Profiles / Lease Info / Document Chains / Document Templates / Document Template

Lease Info | Document Chains

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

DOCUMENT TEMPLATE

Document Template | Frequencies | Amounts | Schedules

Item 2 of 2: 1 2

Expand All Collapse All

General

* Document Type ☆

First Creation Date 📅

Status Active ▾

Template

Copy Fwd From Template Record

Referenced Record Number

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 ☆

Save

20. Enter **LO** or **LP** in the **Document Type** field.

21. Enter the **First Creation Date**.

NOTE: The Periodic Payments Subject to Prompt Pay and Retroactive Payments Subject to Prompt Pay checkboxes will be selected by default. To use a specific prompt pay type, enter LEASE or STD (depending on the chain and type of payment) in the Specific Periodic Payments Prompt Pay Type and Specific Retroactive Payments Prompt Pay Type fields. If left blank, the default prompt pay type will be used.

22. Select the **Amounts** tab.

23. Select **Add**.

Figure 7: Add Amount

Lease Info | Document Chains

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

AMOUNTS

Document Template | Frequencies | Amounts | Schedules

No results

Change Effective Date | Payment Amount | Amount Interval | Number of Years (X)

Add Copy Remove

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24. Enter the **Change Effective Date**.

25. Enter the amount in the **Payment Amount** field.



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26. Select **Periodic Retroactive Documents** from the **Retroactive Document Options** drop-down list.
27. Select **Annually** from the **Amount Interval** drop-down list.

Figure 8: Amount Fields

— General

* Change Effective Date	<input type="text"/>
* Amount	<input type="text" value="\$0.00"/>
* Retroactive Document Options	Periodic Retroactive Documents ▾
Annual Amount	<input type="text" value="\$0.00"/>
* Amount Interval	Annually ▾
Number of Years (X)	<input type="text"/>

— Description

Description	<input type="text"/>
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28. Select **Save** to update the Lease Profile.

NOTE: An error message will be displayed unless at least one document template is added to the Lease Profile. For steps to create a document template, please see the Lease Payment Document Template QRG or Lease Commitment Document Template QRG.