



Pegasys Quick Reference Guide

Creating a Purchase Order: Intro

- Orders are created in Pegasys when a decision is made to purchase goods or services from a vendor.
- Once approved, the Purchase Order form (GSA Form 300) is processed to obligate funds. The document can then be printed and sent to the vendor. Orders may later be associated to future receipts, invoices, and payments. Sometimes, a Purchase Request (PR) can precede an order.
- Fields with red asterisks (*) are mandatory for Pegasys processes but may not include all fields required by GSA policy.
- In Pegasys, users create one document type to record both non-itemized and itemized transactions.
- For detailed information, please refer to the Reservations and Requests chapter of the Purchasing User Guide.

GSA Policy

- All purchase orders require approval from an Authorized Buyer if the purchase is \$3,000 or less, or approval from a Contracting Officer if the purchase is more than \$3,000.
- Only a processed Purchase Order can be amended. To amend an Order, select Transactions → Purchasing → Amend → Order from the Pegasys menu bar.
- The Requisitioner and the name entered on the Delivery office address tab page will receive an email notification if receipt is not logged at the time the invoice is logged.
- The vendor name or designated agent cannot be changed once a purchase order is created except with the use of a Novation.

Creating a Purchase Order

1. Select **Transactions** → **Purchasing** → **New** → **Order** from the Pegasys menu bar.
2. Enter the appropriate document type in the **Document Type** field.
3. Select **Generate**. Once the document number is generated, the [**Generate**] button will be disabled, prohibiting multiple selection attempts so that sequence numbers are not skipped.
4. Leave the Security Org and Document Title fields blank.
 - a. The user's default Security Org will populate the field on the Header page. The default Security Org is GSA.



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Figure 1: New Order

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NEW ORDER

[New Order](#)

* Document Type	OP	Other Purchase Order
Document Number Format Prefix	<input type="text"/>	
Fiscal Year	2021	
AAC/DODAAC	<input type="text"/>	
Security Org	<input type="text"/>	
* Document Number	OP0003103	Generate
Title	<input type="text"/>	
Copy Document	<input checked="" type="radio"/> None <input type="radio"/> Copy From <input type="radio"/> Copy Forward	
File	Choose File No file chosen	

[Go to top of Main Content](#)

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

5. To copy forward the PR, **follow Steps 6 - 11**. Otherwise, **skip to Step 12**.
6. Select **Copy Forward**.
7. Select **Next**.
8. Enter **PR** in the Document Type field.



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9. Enter the document number of the appropriate purchase request in the **Document Number** field or the appropriate values in the **Search Criteria** fields if the document number is unknown.
10. Select **Search**.

Figure 2: Copy Forward

COPY FORWARD

[Copy Forward](#)

Search Criteria

Document Type

Document Number

Document Status

User ID

Title

Accounting Period

Accounting Period

From Date

To Date

Vendor

Copy Lines

Copy all lines Choose which lines to copy Copy no lines

+ Additional Criteria

+ Accounting Dimensions

No results

Document Category	Document Type	Document Number	Document Date	Amendment / Modification Number	Temporary Amendment Number	Title

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11. Select the appropriate document from the list.
12. Select **Finish**.
 - a. If the copy forward was used, all of the corresponding fields from the PR, except for Suggested Vendors, will be on the new Purchase Order.
13. Enter the purchaser’s name in the **Ordered By** field.
 - a. Order Date, Acctg Period and Reporting Acctg Period fields will default to the current date when the form is Verified or Submitted.
 - b. If you copied forward, the PDN Number will be copied forward from the PR and will populate the Title field.



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Figure 3: Header Field

Pegasys / Transactions / Purchasing / New / Order / Header: OP Other Purchase Order OP0003103 NEW FULL FORM

HEADER

Header | Fixed Assets | Office Addresses | Header Accounting Lines | Itemized Lines | Credit Cards | ...

— General

Document Type	OP Other Purchase Order	Order Date	<input type="text"/>
Status	NEW	Accounting Period	<input type="text"/>
Document Number	OP0003103	Reporting Accounting Period	<input type="text"/>
Title	<input type="text"/>	Document Classification	<input type="text"/>
Ordered By	<input type="text"/>	Security Org	GSA
Agency UEI	<input type="text"/>	<input type="checkbox"/> Suppress Printing	
Agency DUNS Number	<input type="text"/>	<input type="checkbox"/> Fast Pay	
Agency EFT Indicator	<input type="text"/>	<input type="checkbox"/> Invoice Required	
Disbursing Office	<input type="text"/>	<input type="checkbox"/> Receipt Required	

14. Enter a **vendor** in the Vendor Information group box, or select the **Code** link to search for a vendor and follow the steps below.
 - a. Enter the applicable search criteria, and select **Search**. Find the appropriate vendor record, and select the corresponding **Select** button.
 - b. The Vendor Name field will populate from the Vendor Code that is selected.

Figure 4: Vendor Information

— Vendor Information

Vendor

* Vendor

Address Name

15. Enter the appropriate code in the **Remit To Address** field.
NOTE: The Remit To Address should be the second box of the Vendor Code.

Figure 5: Customer Account and Remit to Address Field

Customer Account

* Remit To Address

16. Enter a **Contract, Order or Lease Number** in the Contract group box if not copied forward from the PR.



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Figure 6: Contract Details

— Contracts

Contracts Number ☆

Blanket Agreement Number ☆

Delivery Order Number ☆

Expiration Date

Type of Action

Order Type

Priority

Priority Rating

Primary PSC

Primary PSC Description

Primary NAICS

Primary NAICS Description

View Contract / Blanket Agreement

Default Contract / Blanket Agreement To Lines

17. Enter discount terms about the order in the Discount Terms group box.
 - a. If not entered, payment will be made NET 30 days or according to the vendor code.

Figure 7: Discount Terms

— Discount Terms

Tender Type ☆

Place of Inspection

Inspection Days

Place of Acceptance

Acceptance Days

Negotiated Payment Days

Discounts		
Days	Percentage (%)	Amount
<input type="text" value="0"/>	<input type="text" value="0.000"/>	<input type="text" value="\$0.00"/>
<input type="text" value="0"/>	<input type="text" value="0.000"/>	<input type="text" value="\$0.00"/>
<input type="text" value="0"/>	<input type="text" value="0.000"/>	<input type="text" value="\$0.00"/>
<input type="text" value="0"/>	<input type="text" value="0.000"/>	<input type="text" value="\$0.00"/>

18. Select the **Office Addresses** tab.
19. Select the **Add** button.
20. Select the appropriate **Office Type**.



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Figure 8: Office Addresses

OFFICE ADDRESSES

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

Office Address Additional Contacts

1 - 5 of 5 results

Office Type	Office	Address	Primary Point Of Contact
<input checked="" type="radio"/> COR		null null	
<input type="radio"/> Delivery		null null	
<input type="radio"/> Issue		null null	
<input type="radio"/> Property		null null	
<input type="radio"/> Invoice		null null	

More Add Copy Remove 10 per page

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21. Enter the appropriate address in the **Code**, **Address Name**, and **Email Address** fields.

NOTE: Users should use a valid email address for each Office Address type that is added.

Figure 9: Office Address Sub Tab

OFFICE ADDRESS

Office Address Additional Contacts

Item 1 of 5: 1 2 3 4 5

General

Default Mailing Address Update Address Clear Address

* Office Type COR

Code

AAC/DODAAC

Standardized Format Yes

Address Name

Address Line 1

22. Select the **Office Addresses** tab to return, and repeat steps 19 - 21 as needed.

NOTE: Additional Contacts can be added to any entered addresses, and multiple secondary contacts can be entered for each office address.

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

24. Select **Add** to add a line.



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Figure 10: Header Accounting Lines Tab

HEADER ACCOUNTING LINES

Header | Fixed Assets | Office Addresses | Header Accounting Lines | Itemized Lines | Credit Cards | ...

Header Accounting Line | Tax Lines

No results

<input type="checkbox"/>	Line Number	Amount	Transaction Type	Accounting Template	BBFY	EBFY
Total Header Funded Amou						

References,.. | **Add** | Copy | v | Remove | Reset | Replace

- a. To open an existing line, select the appropriate line, and select the **Header Accounting Line** link.
25. Enter the appropriate amounts for the **Purchase Order** in the Line Amounts group box.
- a. If PR was copied forward, **skip to step 33**; otherwise proceed to **step 26**.

Figure 11: Line Amount

— Line Amounts

	Current Amount
Ordered	<input type="text" value="\$0.00"/>
Applied Credit	<input type="text" value="\$0.00"/>
Withholding Tax	<input type="text" value="\$0.00"/>
Line Amount After Withholding	<input type="text" value="\$0.00"/>
Withholding Tax Allowance	<input type="text" value="\$0.00"/>
Net Total	<input type="text" value="\$0.00"/>

- 26. Complete the document reference section, but only mark the Final checkbox if you are ready to close out the PR.



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NOTE: Document reference is filled out if you copy forwarded the PR. If you manually enter in the PR information, select the **Default** button to link the documents.

Figure 12: Document Reference

— Document Reference

Type: PR ☆

Number: PR202101130003 ☆

Item: 0000 ☆

SubItem: ☆

ExhibitItem: ☆

Accounting: 1 ☆

Final Misc Liquidate Items

27. Enter the **Template** in the Accounting Dimensions group box.
 - a. To search for a template, select on the template link, enter the applicable search criteria and select Search. Find the appropriate template record, and select the corresponding Select button. The selected template will populate in the Template field.

Figure 13: Accounting Dimensions

— Accounting Dimensions

* Template: [Search Field] ☆

* BBFY: [Dropdown] >

EBFY: [Dropdown] >

Fund: [Dropdown] ☆

Region: [Dropdown] ☆

Org Code: [Dropdown] ☆

Program: [Dropdown] ☆

Project Code: [Dropdown] ☆

Activity: [Dropdown] ☆

Sub-Object Class: [Dropdown] ☆

Building #: [Dropdown] ☆

Location/System: [Dropdown] ☆

Vehicle Tag #: [Dropdown] ☆

Work Item: [Dropdown] ☆

Lease #: [Dropdown] ☆

Cost Organization: [Dropdown] ☆

YBA: [Dropdown] >

BETC: [Dropdown] ☆

PRC: [Dropdown] ☆

Cohort Yr: [Dropdown] >

28. Complete any other required accounting elements that were not populated by the accounting template.
29. View or enter necessary information about this line in the **Description** field.
30. Select the **Header Accounting Lines** link to return.
 - a. New lines can be created by selecting **Add** and repeating steps 24 - 31.
 - b. Lines can be copied by selecting the appropriate line, selecting **Copy** and then selecting the **Header Accounting Line** link to open the new line to make needed changes.
 - c. Lines can be deleted by selecting the appropriate line and selecting **Remove**.
31. If necessary, select the **Approval Routing** tab, and select **Add User** or **Add Routing List**.



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Figure 14: Approval Routing

APPROVAL ROUTING

Header | Fixed Assets | Office Addresses | Header Accounting Lines | Itemized Lines | **Approval Routing** | ...

No results

<input type="checkbox"/> Approver ID	Approver Name
<p>Add Routing List Add User Remove</p>	

32. Enter the appropriate search criteria, and select **Search**.

Figure 15: User ID and Name Search Criteria

SEARCH

Search Criteria

User ID

Name

Search

33. Select the **Select** button to indicate the user or routing list you wish to add.

Figure 16: Principal ID

<input type="checkbox"/> Principal ID	Name
<input type="checkbox"/> allroles90	All Roles 90 CGI

34. Select **Verify**.

- a. Correct any errors that are displayed.

35. Select **Save**.

- a. Attach backup documents.

36. Select the **Submit** button at the bottom of the page.

Figure 17: Save Verify and Submit Button

...

NOTE: To set a Workflow Priority of Urgent when submitting a form for approval, select the **Submit dropdown arrow** and then select **Urgent**.