

Introduction

Blanket purchase agreements are pre-negotiated agreements between GSA and vendors. To track spending against a blanket purchase agreement (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.

Entering a BPA Number

1. Sign into **Pegasys**.
2. Select **Reference—Purchasing—Blanket Agreement—Blanket Agreements** from the menu bar.
 - *The **Search—Blanket Agreement** page displays.*
3. Click **New**.
 - *The **Blanket Agreement** page displays.*
4. Enter the unique (alphanumeric) BPA number in the **Number** field.
5. Enter the **Buyer** responsible for the BPA
6. Select the **Control Level**.
 - *Only when the control is set to 'Reject' will Pegasys prevent all spending above the limitation.*
7. Enter the maximum dollar amount that can be spent against the BPA in the **Authorized Limit Amount** field.
8. Click the **BPA Typ** hyperlink to search for the appropriate BPA type.
 - *The **Search Blanket Agreement** page displays. Enter the appropriate search criteria, click the **Search** button, select the appropriate Code from*

*the generated list and click the corresponding select button. You will be returned to the **Blanket Agreement** page.*

9. In the **Effective Dates** group box enter the **Start** and **End Dates** for the BPA.
10. Enter the **Vendor Code** and **Vendor Address Code** for the vendor with whom GSA is entering the agreement.
 - *If the vendor is unknown, contact your contracting officer.*
11. Enter additional information (e.g., the purpose of the agreement) in the **Description** field.
12. Click the **Commodities** tab.
 - *The **Commodities** page displays.*
13. Click **Add**.
 - *The new **Commodity** page displays.*
14. Enter the **Commodity Code, Unit**.
15. In the Limited By group box enter the Total Limit Amount, **Quantity Limit**, and/or the **Unit Price Limit**, by which to limit the itemized purchases against the BPA.
16. Return to the Commodities page by clicking the **Commodities** hyperlink.
 - *New commodities can be entered by repeating steps 16-18.*
 - *A commodity can be copied by selecting the desired commodity, clicking **Copy**, selecting the new commodity and clicking the **Commodity** hyperlink to apply any changes.*
 - *A commodity can be deleted by selecting the appropriate commodity and clicking **Remove**. A commodity can be modified by selecting the desired commodity and clicking the **Commodity** hyperlink (opening the commodity to make any needed changes).*
17. Click the **Save** button to save the BPA record.

Creating a BPA—Limitations

1. Log into **Pegasys**.
2. Select Transactions—Purchasing—New—Request from the menu bar.
 - *The **New—Request** page displays.*

3. Enter **BL** into the **Document Type** field.
4. Click **Generate** to generate a unique document number in the **Document Number** field.
5. Click **Finish**.
 - *The **Request Header** page displays.*
6. Complete the **Authorized By** field.
 - *The **Request Date, Accounting Period, and Reporting Accounting Period** fields default when the form is verified or processed.*
7. In the **Vendor Information** group box, enter the **Vendor Code** applicable to the BPA.
8. Enter a **Blanket Agreement Number** in the **Contracts Information** group box.
 - *If unknown, click the **Blanket Agreement Number** hyperlink. The **Search—Blanket Agreement** page displays. Enter the appropriate Search Criteria and click the **Search** button. Select the appropriate agreement and click the corresponding **Select** button. You will be returned to the **Header** tab.*
9. Click the **Suggested Vendors** tab.
 - *The **Suggested Vendors** page displays.*
10. Click **Add** to enter the remit to vendor and address code.
 - *This information prints on the GSA Form 300/GSA Form 3521.*
11. Select the Header Accounting Lines link.
 - *The **Header Accounting Lines** tab displays.*
12. Click **Add** to create a new line.
 - *The new **Header Accounting Line** displays.*
13. In the **Line Amounts** group box, enter the requested amount of the BPA in the **Requested Line Amount** field.
14. Click the **Template** hyperlink in the Accounting Dimensions group box.
 - *The **Search—Template** page displays. Enter the appropriate Search Criteria and click the **Search** button. Select the appropriate template and click the corresponding **Select** button. 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.

17. Enter a **Description** to record descriptive information about the BPA.
 - *This information prints on the GSA Form 300/GSA Form 3521.*
18. Return to the Header Accounting Lines page by clicking the Header Accounting Lines hyperlink.
 - *New lines can be entered by repeating steps 16-23.*
 - *A line can be copied by selecting the desired accounting line, clicking **Copy**, selecting the new line and clicking the **Header Accounting Line** hyperlink to apply any changes.*
 - *A line can be deleted by selecting the appropriate line and clicking **Remove**. A line can be modified by selecting the desired line and clicking the **Header Accounting Line** hyperlink (opening the **Header Accounting Line** to make any needed changes).*
19. Click the **Approval Routing** tab and add the appropriate approvers individually or via a routing list.
20. Click **Verify** to display any errors. If necessary, correct the errors and click **Verify** again.
21. Click **Submit** to submit the form to Standard Workflow for approvals.

Creating a BPA—No Limitations

1. Log into **Pegasys**.
2. Select **Transactions—Purchasing—New—Request** from the menu bar.
3. Enter **BP** into the Document type field
Follow **Steps 5–17** for **Creating a BPA with Limitations** above.
4. Leave the dollar amount in the **Requested** field as '\$0.00'. This information does not print on the GSA Form 300/GSA Form 3521.
5. Enter any other required accounting elements.
6. Enter the current budget fiscal year(s) in the **BFYs** field; enter a valid Fund in the **Fund** field, and 'ZZZ' in the **Cost Element** field.
 - *The accounting strip information does not print on the GSA Form 300/GSA Form 3521.*
7. Populate the **Agreement** group box with a referenced RWA or IBAA number, if applicable.

8. Enter a **Description** to record descriptive information about the BPA.
 - *This information prints on the GSA Form 300/GSA Form 3521.*
9. If necessary, click the **Approval Routing** tab and add the appropriate approvers individually or via a routing list.
10. Click **Verify** to display any errors. If necessary, correct the errors and click **Verify** again.
11. Click **Submit** to submit the form to Standard Workflow for approvals or processing.

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. In addition, if the BPA is <=\$2500, an Authorized Buyer's approval is required and if the BPA is >\$2500, 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.

Pegasys Resources

- **Functional Coordinator**
- **Service Representative**
- **Pegasys Web Site**
<http://pegasys.gsa.gov>
- **Pegasys User Guides**
- **Quick Reference Cards**
- **OCFO Service Desk**
Email address - OCFOServiceDesk@gsa.gov
Telephone Number - 1-866-450-6588



**General
Services
Administration**

The Integrated Financial Management System



Pegasys 6.5.0: Blanket Purchase Agreements Quick Reference Card