Introduction

- Pegasys **Correspondence** functionality provides GSA the ability to:
  - Initiate correspondence with the customer
  - Record and track customer correspondence
  - Respond to customer correspondence
  - Associate correspondence records to statements, vendors, and documents
- There are three types of correspondence:
  - **Statement Correspondence** – correspondence specifically related to a billing statement in the financial system
  - **Account Correspondence** – correspondence related to the overall vendor account in the financial system
  - **Document Correspondence** – correspondence specifically related to an Itemized Payment, Cash Receipt, or Internal Voucher document in the financial system
- For detailed information, please refer to the Correspondence chapter of the BAAR User Guide.

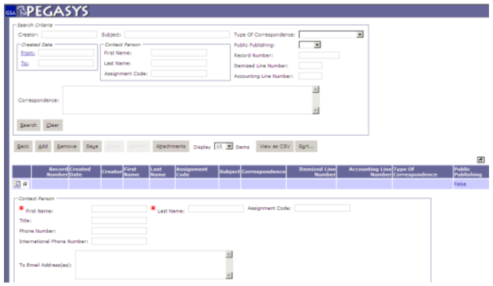
Statement Correspondence

1. To create Statement Correspondence, log into **Pegasys**.
2. Select **Queries→Accounts Receivable→Billing Statement Query** from the menu bar.
3. From the Billing Statement Query page, enter appropriate search criteria and select **Search**.
4. Select the desired billing statement record in the Item Collection and select **Details**.
5. From the Billing Statement Query Detail page, select the **Correspondence** tab.
6. The Statement Level Correspondence page is displayed including: Search Criteria, Item Collection, Contact Person, Agency Contact, Research Information, and Correspondence sections.
7. Select **Add**.
8. Select the new record in the Item Collection.
9. In the Contact Person section (who correspondence is addressed to), populate the First Name (required), Last Name (required), and any other fields pertinent to the correspondence (Title, Phone Number, To Email Address(es), etc.).
10. In the Agency Contact section (who correspondence is sent from), populate the fields pertinent to the correspondence (Name, Title, Phone Number, From Email Address).
11. In the Correspondence section, select the **Communication Source** (required) and **Type of Correspondence** (required) from the available dropdown lists.
12. Update the Correspondence field (required) to include the text to be sent to the customer.
13. Optionally populate the additional fields pertinent to the correspondence.
14. Select the **Public Publishing** checkbox to make the correspondence viewable by the customer in VCSS.
15. Select **Save**.
16. To send an email to the Contact Person containing the information from the correspondence record, select the record in the Item Collection and select **Email**.

Account Correspondence

1. To create Account Correspondence, log into **Pegasys**.
2. Select **Queries→Vendor→Vendor Activity Query** from the menu bar.
3. From the Vendor Query page, enter appropriate search criteria and select **Search**.
4. Select the desired vendor record in the Item Collection and select **Details**.
5. From the Vendor Activity Query Detail page, select the **Account Summary** tab.
6. From the Vendor Activity Query Detail page Account Summary tab, select **Address Amounts**.
7. From the Vendor Activity Query Address Amounts page, select the appropriate vendor address code from the Item Collection and then select **Correspondence**.
8. The Account Level Correspondence page is displayed including: Search Criteria, Item Collection, Contact Person, Agency Contact, Research Information, and Correspondence sections.
9. Select **Add**.
10. Select the new record in the Item Collection.
11. In the Contact Person section, populate the First Name (required), Last Name (required), and any other fields pertinent to the correspondence (Title, Phone Number, To Email Address(es), etc.).
12. In the Agency Contact section, populate the fields pertinent to the correspondence (Name, Title, Phone Number, From Email Address).
13. In the Correspondence section, select the **Communication Source** (required) and **Type of Correspondence** (required) from the available dropdown lists.
14. Update the Correspondence field (required) to include the text to be sent to the customer.
15. Select the **Public Publishing** checkbox to make the correspondence viewable by the customer in VCSS.
16. Select **Save**.
17. To send an email to the Contact Person containing the information from the correspondence record, select the record in the Item Collection and select **Email**.

1. To create Document correspondence, log into **Pegasys**.
2. Select **Transactions→Form/Document Selection** from the menu bar.
3. Enter the Document Number in the Search Criteria section or the Statement Number in the Advance Search section at minimum. Populate the remaining search parameters and select **Search**.
4. Select the desired document from the Item Collection and select **View**.
5. From the Itemized Payment, Cash Receipt, or Internal Voucher form/document Header tab, select the **Correspondence** tab.
6. The Document Level Correspondence page is displayed including: Search Criteria, Item Collection, Contact Person, Agency Contact, Research Information and Correspondence sections.



7. Select **Add**.
8. Select the new record in the Item Collection.
9. In the Contact Person section, populate the First Name (Required), Last Name (Required), and any other fields pertinent to the correspondence (Title, Phone Number, To Email Address(es) etc.).
10. In the Agency Contact section, populate the fields pertinent to the correspondence (Name, Title, Phone Number, From Email Address).
11. In the Correspondence section, select the **Communication Source** (required) and **Type of Correspondence** (required) from the available dropdown lists.
12. Update the Correspondence field (required) to include the text to be sent to the customer.
13. Optionally populate the additional fields pertinent to the correspondence.
14. Select the **Public Publishing** checkbox to make the correspondence viewable by the customer in VCSS.
15. Include the Accounting Line Number associated with the correspondence.
16. Select **Save**.
17. To send an email to the Contact Person containing the information from the correspondence record, select the record in the Item Collection and select **Email**.

1. Attachments can be added directly to correspondence. Please refer to the User Guide, Delinquency and Receivables Management PowerPoint or Exercises for detailed instructions.

- **Functional Coordinator**
- **Service Representative**
- **Pegasys Web Site** **http://pegasys.gsa.gov**
- **Pegasys User Guides**
- **BAAR User Guides**
- **Quick Reference Cards**
- **Federal Financial Service Desk** **OCFOServiceDesk@GSA.gov**

BAAR: Correspondence Quick Reference Card

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