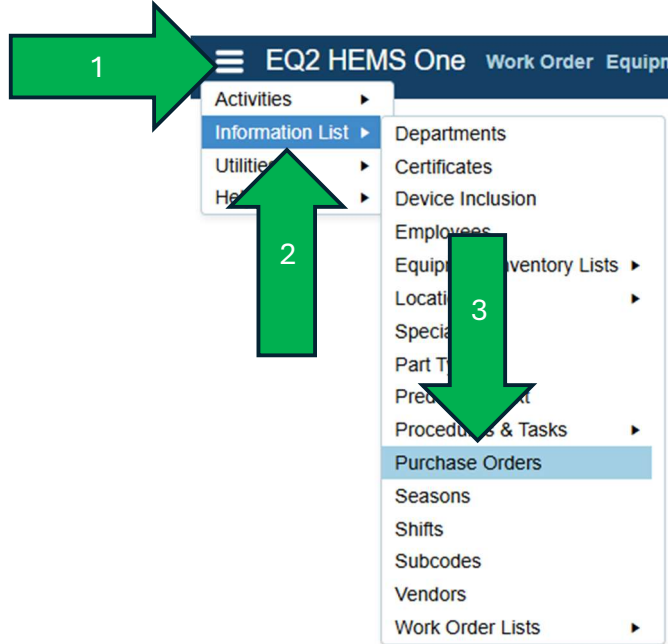


# HEMS One: Purchase Orders

To access Purchase Order records, click on the hamburger menu in the upper left of the HEMS One window (1), then select the Information Lists menu (2), followed by the Purchase Order submenu (3).



The Purchase Order record is made up of three tabs: Details, Attachments, and Model.

The image shows a screenshot of the 'Purchase Orders Add/Edit' form. The form has a blue header bar with the text 'Purchase Orders Add/Edit' and a close button. Below the header, there are three tabs: 'Details', 'Attachments', and 'Model'. The 'Details' tab is active. The form contains several fields and sections:

- PO**: A text input field.
- Description**: A text input field.
- Active/Shared**: Two checkboxes, with 'Active' checked.
- PO Date**: A date input field with a calendar icon, showing '07/25/2025'.
- Expected Delivery Date**: A date input field with a calendar icon.
- Vendor**: A text input field showing 'NONE'.
- Type**: A dropdown menu showing 'NONE'.
- EST. Hours**: A text input field showing '0.00'.
- Hour Rate**: A text input field with a dollar sign, showing '\$ 0.00'.
- NTE**: A text input field with a dollar sign, showing '\$ 0.00'.
- Total Cost**: A text input field with a dollar sign, showing '\$ 0.00'.
- Notes**: A text area for notes.
- Coverages**: A section with four checkboxes: 'Equipment', 'Contract', 'Parts', and 'Labor', all of which are unchecked.



# HEMS One: Purchase Orders

## Details Tab




Purchase Orders Add/Edit 📄 ✖

**Details** Attachments Model




PO  Description   Active  Shared

PO Date   Expected Delivery Date   Vendor  Type

EST. Hours  Hour Rate  NTE  Total Cost

Notes    

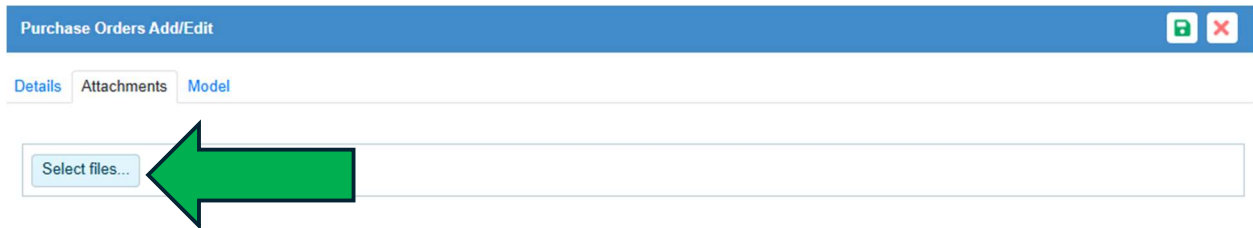
Coverages  Equipment  Contract  Parts  Labor

1. **PO:** The Purchase Order number.
2. **Description:** A description of the PO.
3. **Active Checkbox:** If this box is checked, the PO is active.
4. **Shared Checkbox:** If this box is checked, the PO is shared between service areas.
5. **PO Date:** The Date the PO was created.
6. **Expected Delivery Date:** The expected delivery date of the purchased goods.
7. **Vendor:** The seller of the purchased goods.
8. **Type:** The type of Purchase Order.
9. **Est. Hours:** The Estimated Hours for a labor purchase order.
10. **Hour Rate:** The Hour Rate for a labor purchase Order.
11. **NTE:** The monetary maximum limit of the Purchase Order.
12. **Total Cost:** The total cost of the Purchase Order.
13. **Notes:** This is an open text field.
  - a. To add a timestamp to the Notes field, use the clock icon to the right of the field .
  - b. To expand the Notes field, use the Show Expanded View icon .
  - c. To use predefined text in the Notes field, use the Predefined Text icon .
14. **Coverages checkboxes:** Checked boxes indicate the element is covered by the PO.

# HEMS One: Purchase Orders

## Attachments Tab

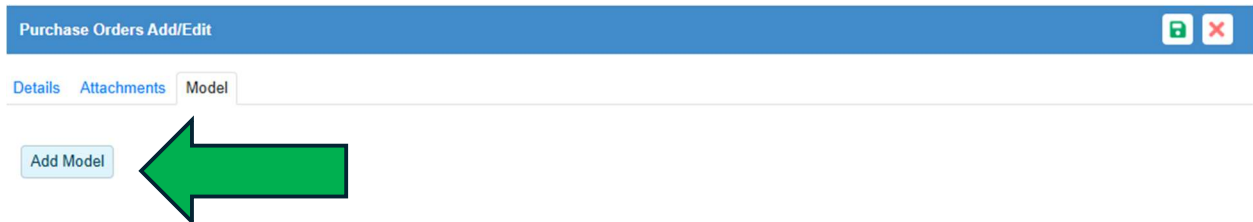
Use the “Select files...” button to browse for files to attach.



The screenshot shows the 'Purchase Orders Add/Edit' interface with the 'Attachments' tab selected. A green arrow points to the 'Select files...' button on the left side of the attachment area.

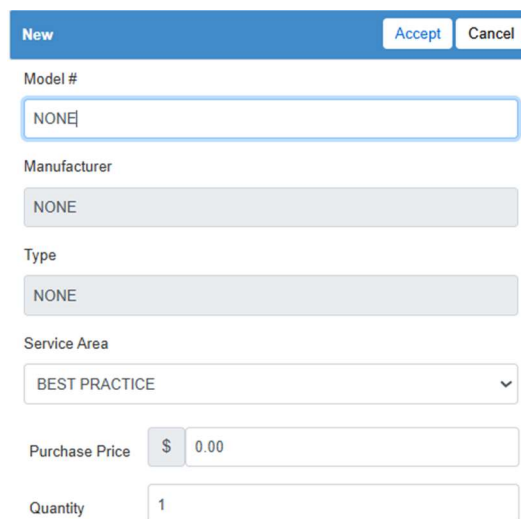
## Model Tab

Use the Add Model button to add model information to a Purchase Order record if needed.



The screenshot shows the 'Purchase Orders Add/Edit' interface with the 'Model' tab selected. A green arrow points to the 'Add Model' button on the left side of the model information area.

A new window will appear where the model #, Service Area, Purchase Price, and quantity can be defined. The Manufacturer and Type fields are associated with the Model # field and are not editable in this view. Once the information is defined, clicking on the Accept button in the upper right saves the Model information to the Purchase Order record.



The 'New' dialog box contains the following fields:

- Model #: NONE
- Manufacturer: NONE
- Type: NONE
- Service Area: BEST PRACTICE
- Purchase Price: \$ 0.00
- Quantity: 1

Buttons: Accept, Cancel