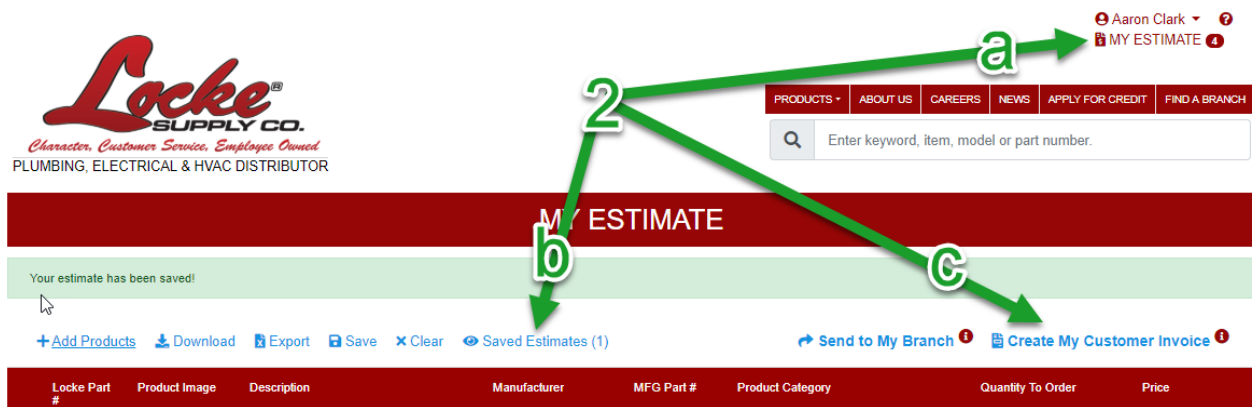


My Customer Invoice

You can use **My Estimate** to quickly create a custom invoice for your customer with your logo, pricing markup, tax rate, and message. **My Customer Invoice** requires a Customer Number (set by a Locke Supply associate) and a Home Branch. You can set/change your Home Branch from your **My Account** settings or from any product page using the **FIND A BRANCH** link in the top menu.

1. To create a **My Customer Invoice**, you must first create an estimate using **MY ESTIMATE**. For help creating an estimate please visit <https://www.LockeSupply.com/HowTo>. Price and availability are subject to change prior to an order being submitted for purchase.
2. Navigate to your **My Estimate** summary page.
 - a. Click on **MY ESTIMATE** at the top right corner of the page.
 - b. Create a new **MY ESTIMATE** (see #1 above) or open a **Saved Estimate**.
 - c. From there you can begin by clicking **Create My Customer Invoice**.



The screenshot shows the Locke Supply Co. website interface. At the top left is the company logo and tagline: "Locke SUPPLY CO. Character. Customer Service. Employee Owned. PLUMBING, ELECTRICAL & HVAC DISTRIBUTOR". The top navigation bar includes links for PRODUCTS, ABOUT US, CAREERS, NEWS, APPLY FOR CREDIT, and FIND A BRANCH. A search bar is located below the navigation. The main content area features a dark red header with "MY ESTIMATE" in white. Below this is a green notification bar that says "Your estimate has been saved!". A toolbar contains several action buttons: "+ Add Products", "Download", "Export", "Save", "Clear", "Saved Estimates (1)", "Send to My Branch", and "Create My Customer Invoice". At the bottom, a table header is visible with columns: Locke Part #, Product Image, Description, Manufacturer, MFG Part #, Product Category, Quantity To Order, and Price. Three green callout boxes with arrows point to specific elements: 'a' points to the "MY ESTIMATE" link in the top right; 'b' points to the "MY ESTIMATE" header; and 'c' points to the "Create My Customer Invoice" button.

My Customer Invoice

3. Fill out the form with
 - a. Your company information in the **My Company Information** section
 - b. Your customer's information in the **My Customer Information** section
 - c. Add your logo here (will automatically be saved for future use once you've added it)

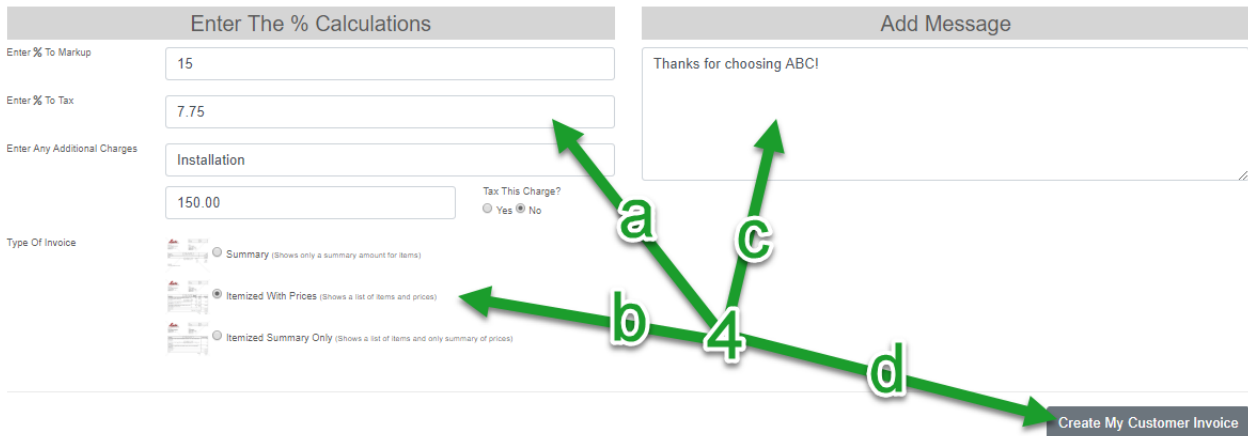


The screenshot shows the 'CREATE MY CUSTOMER INVOICE' form. At the top left is the Locke Supply Co. logo and tagline. At the top right is a navigation menu with links for PRODUCTS, ABOUT US, CAREERS, NEWS, APPLY FOR CREDIT, and FIND A BRANCH, along with a search bar. Below the navigation is a red banner with the text 'CREATE MY CUSTOMER INVOICE'. Underneath is a light blue box with instructions: 'Use this tool to create a custom invoice for your customer from items in your My Estimate. Add the percentage to markup your items, a percentage to tax your customer as well as your personal information and a custom invoice will be created for you.' The main form is divided into two sections: 'My Company Information' and 'My Customer Information'. The 'My Company Information' section has fields for Company Name (ABC), Address (1234 B Street), City (Oklahoma City), State (OK), Zip Code (71), Phone (5555555555), Email (abc@gmail.com), Website, and Company Logo. The 'My Customer Information' section has fields for Company Name (T.B. Appliances), Customer or Contact Name (Toni Bailey), Address (1234 B. Street), City (Edmond), State (OK), Zip Code (73021), Phone (555-555-5555), Email (tbailey@bmail.com), and PO # (PO #54321). A green box highlights the 'Company Logo' field, which contains a placeholder image with the text 'YOUR LOGO HERE' and a 'Choose File' button. Green arrows labeled 'a', 'b', and 'c' point to the 'My Company Information', 'My Customer Information', and 'Company Logo' sections respectively. A large green '3' is positioned at the top center of the form.

My Customer Invoice

4. Fill out the form

- In the **Enter The % Calculations** section, enter your markup rate, and tax rate. Additional charges can be set to taxed or not taxed.
- Then choose the **Type of Invoice** you want to send (Summary, Itemized With Prices, or Itemized Summary). Use the picture icon to get a quick idea of what the invoice will look like.
- You can also add an optional custom message in the **Add Message** section.
- Finally, click the **Create My Customer Invoice** button to submit your information and create your custom invoice.



Enter The % Calculations

Enter % To Markup: 15

Enter % To Tax: 7.75

Enter Any Additional Charges: Installation

150.00

Tax This Charge? Yes No

Type Of Invoice

- Summary (Shows only a summary amount for items)
- Itemized With Prices (Shows a list of items and prices)
- Itemized Summary Only (Shows a list of items and only summary of prices)

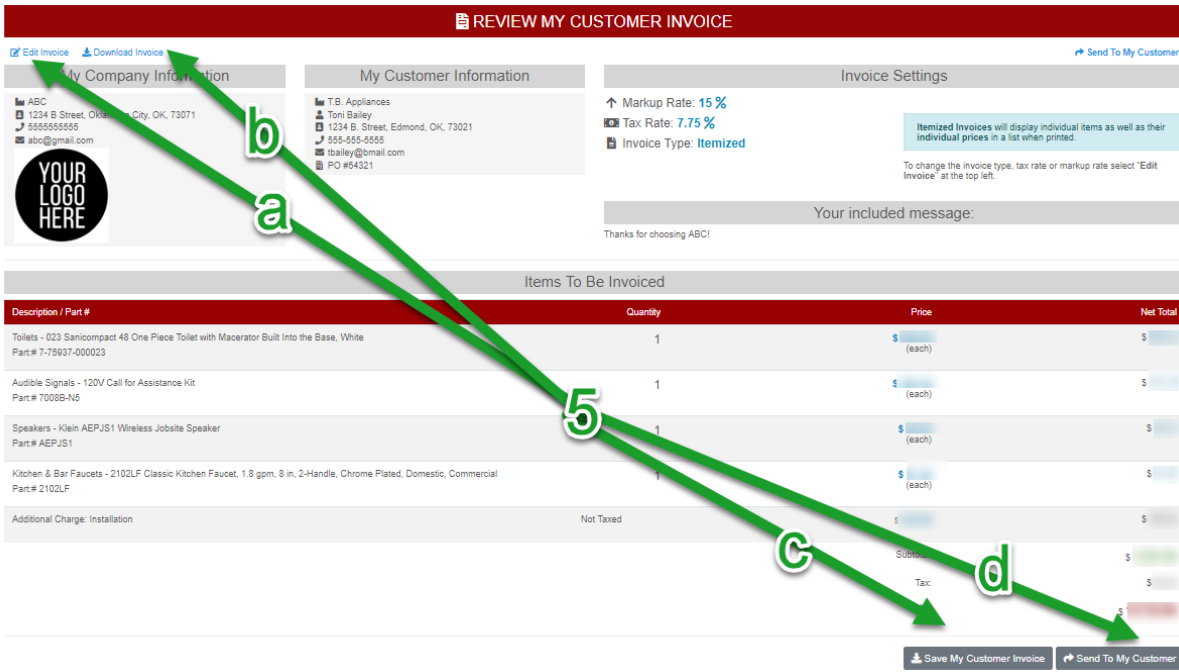
Add Message

Thanks for choosing ABC!

Create My Customer Invoice

5. From the **REVIEW MY CUSTOMER INVOICE** page you can review your information AND,

- Make revisions using the **Edit Invoice** link (takes you back to the **CREATE MY CUSTOMER INVOICE** form.)
- Download a copy of the PDF to preview, save, and print using the **Download Invoice** link.
- Save a copy of this **My Customer Invoice** in your LockeSupply.com account for later use.
- Email this invoice to your customer and a copy to yourself.



REVIEW MY CUSTOMER INVOICE

[Edit Invoice](#) [Download Invoice](#) [Send To My Customer](#)

My Company Information

ABC
1234 B Street, Oklahoma City, OK, 73071
5555555555
abc@gmail.com

My Customer Information

T.B. Appliances
Tom Bailey
1234 B Street, Edmond, OK, 73021
555-555-5555
tbailey@gmail.com
PO #54321

Invoice Settings

Markup Rate: 15 %
Tax Rate: 7.75 %
Invoice Type: Itemized

Itemized Invoices will display individual items as well as their individual prices in a list when printed.

To change the invoice type, tax rate or markup rate select "Edit Invoice" at the top left.

Your included message:
Thanks for choosing ABC!

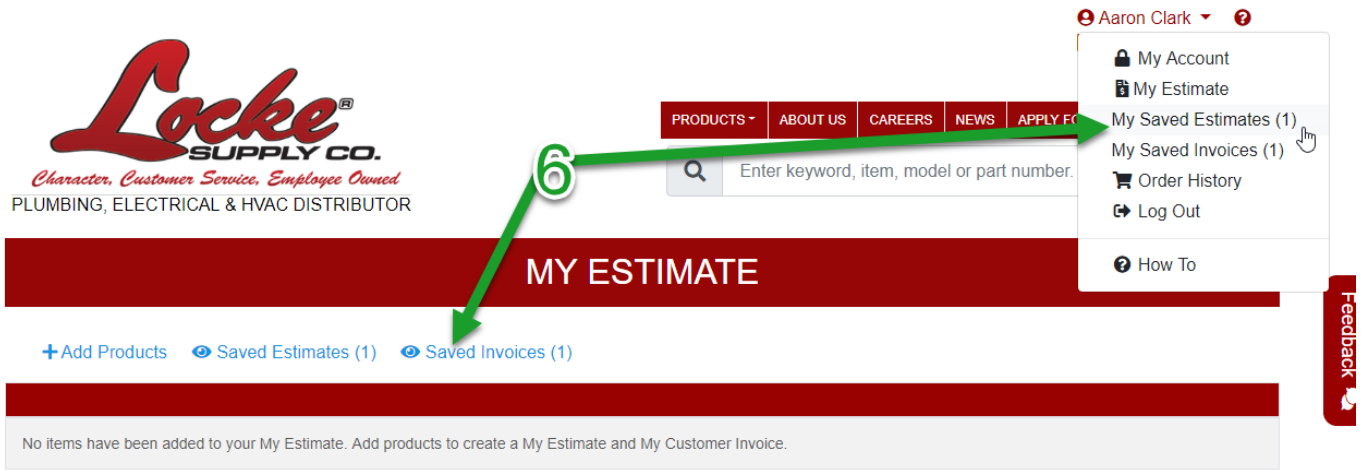
Items To Be Invoiced

Description / Part #	Quantity	Price	Net Total
Toilets - 023 Sanicompact 48 One Piece Toilet with Macerator Built into the Base, White Part# 7-75937-000023	1	\$ (each)	\$
Audible Signals - 120V Call for Assistance Kit Part# 7008B-N5	1	\$ (each)	\$
Speakers - Klein AEPJ51 Wireless Jobsite Speaker Part# AEPJ51	1	\$ (each)	\$
Kitchen & Bar Faucets - 2102LF Classic Kitchen Faucet, 1.8 gpm, 8 in, 2-Handle, Chrome Plated, Domestic, Commercial Part# 2102LF	1	\$ (each)	\$
Additional Charge: Installation	Not Taxed	\$	\$
		Subtotal	\$
		Tax	\$

Save My Customer Invoice **Send To My Customer**

My Customer Invoice

6. To return to your saved My Customer Invoices, click the **MY ESTIMATES** link at the top right corner of any page to go to the MY ESTIMATE page, or click **<your user name>** in the top right to display the links in the dropdown menu.



The screenshot shows the Locke Supply Co. website interface. At the top left is the company logo and tagline: "Locke[®] SUPPLY CO. Character, Customer Service, Employee Owned. PLUMBING, ELECTRICAL & HVAC DISTRIBUTOR". The top navigation bar includes links for "PRODUCTS", "ABOUT US", "CAREERS", "NEWS", and "APPLY FOR". A search bar is present with the placeholder text "Enter keyword, item, model or part number.". In the top right corner, the user name "Aaron Clark" is displayed with a dropdown arrow. The dropdown menu is open, showing options: "My Account", "My Estimate", "My Saved Estimates (1)", "My Saved Invoices (1)", "Order History", "Log Out", and "How To". A green arrow labeled "6" points from the "MY ESTIMATE" link in the navigation bar to the "My Saved Estimates (1)" option in the dropdown menu. Below the navigation bar, the page title "MY ESTIMATE" is displayed. Underneath, there are links for "+ Add Products", "Saved Estimates (1)", and "Saved Invoices (1)". A message box at the bottom states: "No items have been added to your My Estimate. Add products to create a My Estimate and My Customer Invoice." A vertical "Feedback" button is located on the right side of the page.