

My Customer Invoice

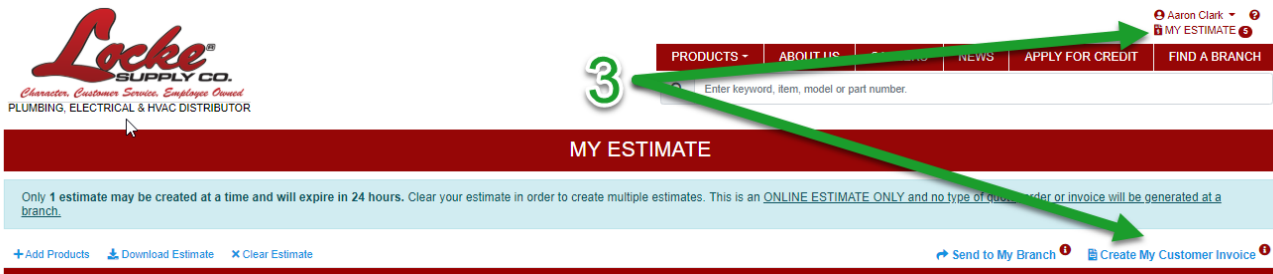


You can use **My Estimate** to quickly create a custom invoice for your customer with your logo, pricing markup, tax rate, and message. **My Customer Invoice** requires a Customer Number (set by a Locke Supply associate) and a Home Branch. You can set/change your Home Branch from your **My Account**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

1. You can set/change your Home Branch from your **My Account** settings (click your name) or from any product page using the **FIND A BRANCH** link at the top menu.



2. 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>. Estimates created using **My Estimate** will expire after 24 hours. Price and availability is subject to change prior to an order being submitted for purchase.
3. Navigate to your **My Estimate** summary page by clicking on **MY ESTIMATE** at the top right corner of the page. From there you can begin by clicking **Create My Customer Invoice**.




My Customer Invoice



4. Fill out the form with your company information in the **My Company Information** section, and your customer's information in the **My Customer Information** section.
5. Your custom logo will appear here if you've already imported it in your **My Account** section (click your name at top right), or you can add a custom logo here and it will be added to your invoice as well as saved in your My Account.

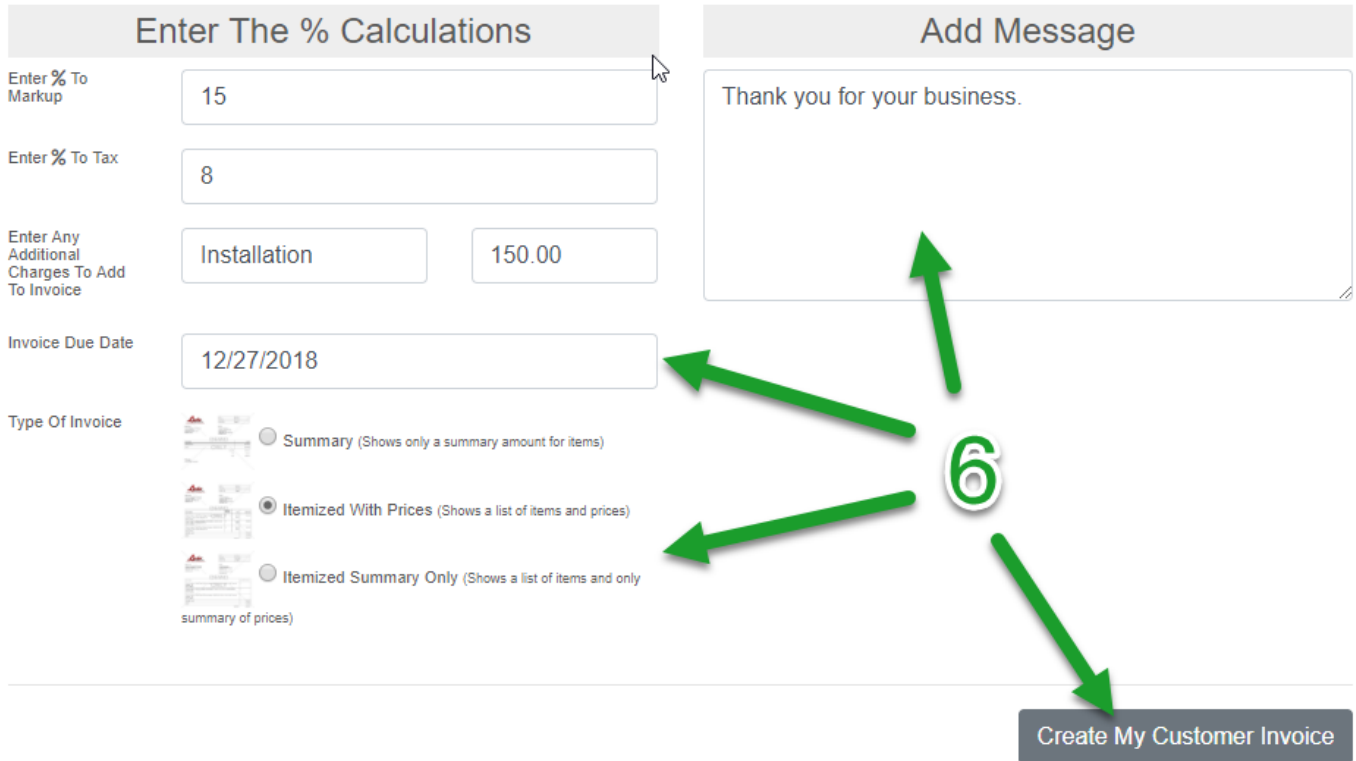
[Edit Invoice Items](#) [Create My Customer Invoice](#)

My Company Information		My Customer Information	
Company Name	<input type="text" value="ABC"/>	Company Name	<input type="text" value="Smith's Appliances"/>
Address	<input type="text" value="1234 B Street"/>	Customer or Contact Name	<input style="border: 1px solid #ccc;" type="text" value="John Smith"/>
City	<input type="text" value="Oklahoma City"/>	Address	<input type="text" value="4321 C Street"/>
State	<input type="text" value="OK"/> Zip Code <input type="text" value="73071"/>	City	<input type="text" value="Oklahoma City"/>
Phone	<input type="text" value="5555555555"/>	State	<input type="text" value="OK"/> Zip Code <input type="text" value="73072"/>
Email	<input type="text" value="abc@gmail.com"/>	Phone	<input type="text" value="5555550000"/>
Website	<input type="text"/>	Email	<input type="text" value="jsmith@smiths.com"/>
Company Logo		PO #	<input type="text" value="PO #54321"/>

Or select a new file:
 No file chosen

My Customer Invoice

6. In the **Enter The % Calculations** section, enter your markup rate, tax rate, additional charges, and select a due date. Then choose the **Type of Invoice** you want to send (Summary, Itemized With Prices, or Itemized Summary). 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.



The screenshot shows two main sections: "Enter The % Calculations" and "Add Message".

Enter The % Calculations:

- Enter % To Markup: 15
- Enter % To Tax: 8
- Enter Any Additional Charges To Add To Invoice: Installation (150.00)
- Invoice Due Date: 12/27/2018
- Type Of Invoice: Itemized With Prices (Shows a list of items and prices)

Add Message:

Thank you for your business.

Create My Customer Invoice button

My Customer Invoice



- From the **REVIEW MY CUSTOMER INVOICE** page you can review your information, make revisions using the **Edit Invoice** link, and save a copy of the PDF to preview it using the **Download Invoice** link.
- When you are satisfied with your custom invoice, you can send it directly to your customer using the **Send to My Customer** link at the top right or the button at the bottom right.

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

Smith's Appliances
John Smith
4321 C Street, Oklahoma City, OK, 73072
5555550000
jsmith@smiths.com
PO #54321

Invoice Settings

Markup Rate: 15 %
Tax Rate: 8 %
Invoice Type: **Itemized**

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

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

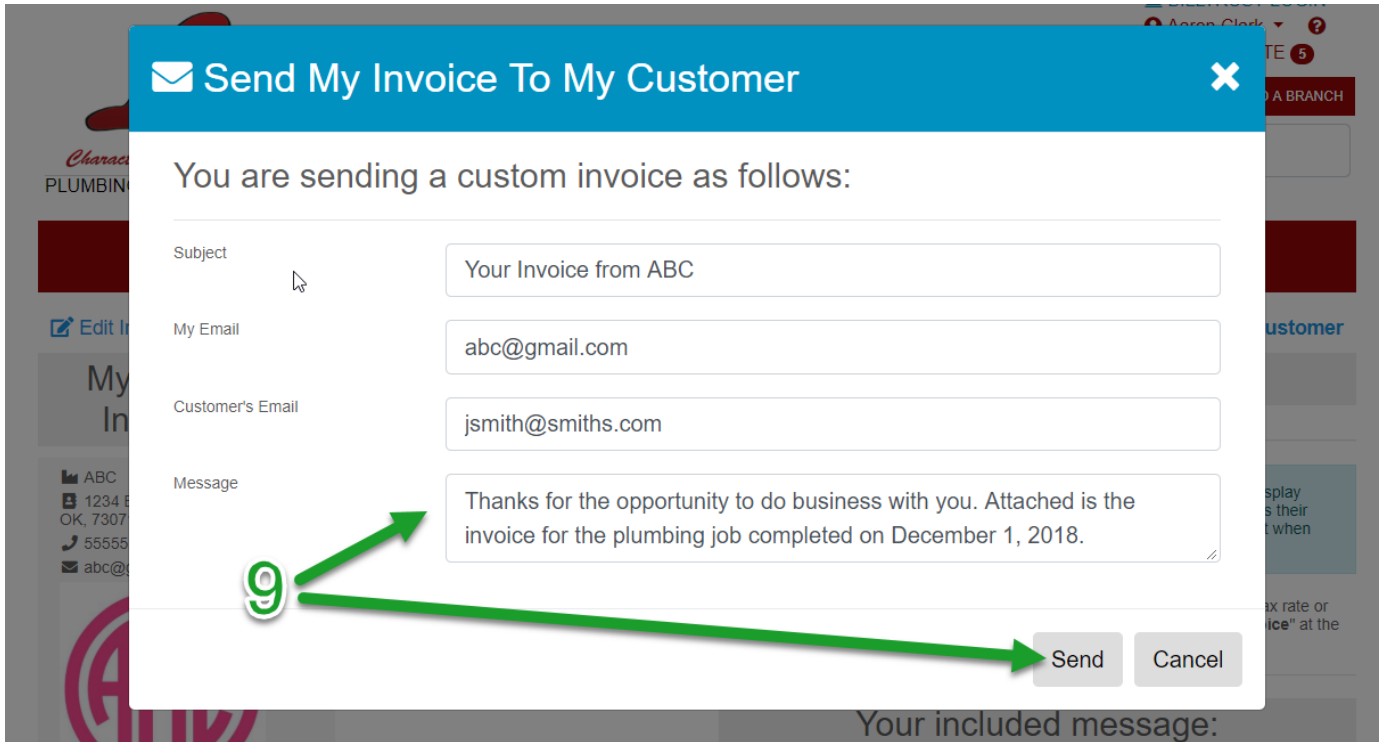
Your included message:
Thank you for your business.

Description / Part #	Quantity	Price	Net Total
Audible Signals - 120V Call for Assistance Kit Part:# 7008B-N5	1	\$	\$
Speakers - KLEIN AEPJS1 Wireless Jobsite Speaker Part:# AEPJS1	1	\$	\$
Kitchen & Bar Faucets - 2102LF Classic Kitchen Faucet, 1.8 gpm, 8 in, 2-Handle, Chrome Plated, Domestic, Commercial Part:# 2102LF	1	\$	\$
Vanity - 19" x 37" Cultured Marble Vanity Top With Oval Bowl, Solid White Part:# 22-0749	1	\$	\$
Toilets - 023 Sanicompact 48 One Piece Toilet with Macerator Built Into the Base, White Part:# 7-75937-000023	1	\$	\$
Additional Charge: Installation			\$
		Subtotal:	\$
		Total:	\$

[Send To My Customer](#)

My Customer Invoice

- The **Send My Invoice To My Customer** form will have your information and your customer's information already included. You can review the information and edit it, then write a custom message to be included in the body of the email. When you are satisfied everything is correct, click the **Send** button. A copy will be sent to your email and your customer's email along with a PDF attachment of the **My Customer Invoice** you created.



Send My Invoice To My Customer

You are sending a custom invoice as follows:

Subject: Your Invoice from ABC

My Email: abc@gmail.com

Customer's Email: jsmith@smiths.com

Message: Thanks for the opportunity to do business with you. Attached is the invoice for the plumbing job completed on December 1, 2018.

9 → Send Cancel

Your included message:

- Keep a copy of the PDF for your records, as your My Customer Invoice will not be saved on LockeSupply.com. Once you've completed a custom invoice, you can use the **Clear My Estimate** link to clear out your estimate and start over with a new one.