



This information is being supplied for:

Customer Name: _____

Customer Address: _____

Service Provider's Information:

Provider Name: _____

Street: _____

City, ST and Zip: _____

Provider Contact Information Pertaining to this Customer:

Contact name pertaining to invoicing questions: _____

Email address: _____

Phone #: _____

Title: _____

Billing and Warranty Information Pertaining to this Customer:

Labor rate:

- The current rate and date that rate was applied. Date: _____, Rate: \$ _____
- The new rate and date this rate will take effect. Date: _____, Rate: \$ _____

Travel rate: (Cannot exceed 1 hour of labor)

- The current rate and date that rate was applied. Date: _____, Rate: \$ _____
- The new rate and date this rate will take effect. Date: _____, Rate: \$ _____

Flat PM rates: (Only for customers without a National Account)

- The current rate and date that rate was applied. Date: _____,
 Sit Down \$ _____ Stand Up \$ _____ Reach Truck \$ _____ Stock Picker \$ _____ Pallet Jack \$ _____
- The new rate and date this rate will take effect. Date: _____,
 Sit Down \$ _____ Stand Up \$ _____ Reach Truck \$ _____ Stock Picker \$ _____ Pallet Jack \$ _____

Labor & Parts warranty on repair service:

Labor; (Must be at least 90 days) _____, Parts; (Must be at least the OEM's warranty) _____.

Labor and PM/SM Rate Increase Requirements

To request a labor or PM/SM rate increase for this account, please ensure the following conditions are met:

- Frequency: Rate increases may only occur once per location annually.
- Limit: Increases must not exceed 3%.
- Notice: A written notice must be submitted at least 90 days in advance.
- Details Required: Submit the following to LTM Services:
 - Previous rate
 - Date of last increase
 - New proposed rate
 - Effective date of new rate

Important: Any work performed prior to customer approval must be billed at the previous rate.

Pending Invoices

Invoices held due to issues must be resolved within the customer's directive period (60 days). Failure to resolve within this timeframe will result in the invoice being voided.

Planned Maintenance (PM/SM)

For PM/SM services, please adhere to the following guidelines:

- Pricing: Must include all supply costs except oil and filters for IC oil changes.
- Travel Charges: Not permitted.
- Miscellaneous Fees: Not permitted.
- Parts Billing: Not permitted.
- Additional Work: Must be invoiced separately.
- PM/SM Check Sheet: Must be attached to PM/SM invoices.
- Frequency: Every 90 days or 500 hours, whichever comes first.
- OEM Recommended Maintenance: like 1000-hour, 2000-hour, gearbox, transmission, or hydraulic must be pre-approved by LTM.

Invoice Submission Guidelines

- Format: PDF in grayscale or color (no black & white scans).
- Document Placement: First page must be the invoice.
- Document Order: Work order must follow the invoice in the same file.
- Scanned Pages: Must be full-size (8.5x11), not photos.
- Orientation: All pages must be upright and readable.
- Grouping: Group invoices by type (Service, PMs, Rentals, Parts, etc.).
- Email Submission:
 - Do not cc/bcc other LTM addresses.
 - Submit invoices daily, not monthly.
 - Invoices older than 60 days will be discarded.
 - Ensure the submission email can receive replies.

Do Not Submit:

- Replies to disputes (reply to original email only)
- Rebills for credited invoices (send with original email reply)
- Payment inquiries or statements (visit www.ltmervices.com)
- Credits (send with original email reply)

Invoice Requirements

- Invoices and backup documents must be submitted to invoices@ltmservices.net
- Work Order: Must be attached and may NOT be handwritten.
- Labor Hours: Must be listed by date.
- Parts: Include OEM part numbers, descriptions, quantities, and unit prices.
- Dates: Include start and completion dates.
- Hour Meter Reading: Must be documented.
- Customer Signature: Required.
- Charges:
 - No fuel surcharges.
 - Miscellaneous charges over 1% of parts total must be detailed.
 - Travel charges must not be portal-to-portal.
 - Travel/zone charges must be listed separately.
 - Travel can only be billed once per day and once per repair.
 - Environmental fees must relate to the repair.
 - Invoice must show separate totals for parts, labor, travel, freight, miscellaneous, and tax.
 - Freight Billing.
 - Non common parts that are not normally stocked
 - Must be completed within 1–2 days from the start date.
 - Must be pre-approved by the customer. Showing the customer wants to pay extra to get this unit repaired within 1 to 2 days.

- All additional work: Must be billed separately from PM/SM invoices.
 - Damage Repairs: Abuse or accidental damage must be noted in the work order before the facility manager signs. Otherwise, the invoice will be processed as a standard repair.
 - Labor Overage: LTM will audit labor hours using historical data. Unless justified in the work order, excess labor will be reviewed and adjusted accordingly.
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Rentals

Monthly rentals must be billed for a full month. Partial month invoices will not be accepted.

Backup Paperwork Requirements

To facilitate invoice approval: Once signed by the customer, the work order is final. No changes to repair details will be accepted.

- Service Invoices: Must include the work order.
 - PM Invoices: Must include the PM check sheet.
 - Parts-Only Invoices: Must include packing slip or POD.
 - Full Maintenance & Rentals: Do not require backup paperwork.
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Service Providers Signature

Please print your name

Date

Customers Signature

Please print your name

Date