

**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.

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### **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.

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### **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.

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### **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.ltm services.com](http://www.ltm services.com))
- Credits (send with original email reply)

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### **Invoice Requirements**

- Invoices and backup documents must be submitted to [invoices@ltmservices.net](mailto: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 must be completed within 1–2 days to be approved.
- 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.

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**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
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Customers Signature	Please print your name	Date
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