



This information is being supplied at the request of \_\_\_\_\_

**Service Provider's Information:**

Company Name: \_\_\_\_\_

Street: \_\_\_\_\_

City, ST and Zip: \_\_\_\_\_

**Contact Information Pertaining to this Customer:**

Contact name pertaining to invoicing questions: \_\_\_\_\_

Email address: \_\_\_\_\_

Phone #: \_\_\_\_\_

Title: \_\_\_\_\_

**Billing and Warranty Information Pertaining to this Customer:**

Current customer labor rate: \$\_\_\_\_\_, If you are requesting an increase, please provide the following.

- a. Current rate and date that rate was applied. Date: \_\_\_\_\_, Rate: \$\_\_\_\_\_
- b. The new rate and date this rate will take effect. Date: \_\_\_\_\_, Rate: \$\_\_\_\_\_

Travel rate: \$\_\_\_\_\_, If you are requesting an increase, please provide the following.

- a. Current rate and date that rate was applied. Date: \_\_\_\_\_, Rate: \$\_\_\_\_\_
- b. The new rate and date this rate will take effect. Date: \_\_\_\_\_, Rate: \$\_\_\_\_\_

Parts discounts: \_\_\_\_\_% off list.

Flat PM rates: Sit Down \$ \_\_\_\_\_ Stand Up \$ \_\_\_\_\_ Reach Truck \$ \_\_\_\_\_ Turret Truck \$ \_\_\_\_\_ Pallet Jack \$ \_\_\_\_\_

Contract Maintenance monthly rates: Sit Down \$ \_\_\_\_\_ Stand Up \$ \_\_\_\_\_ Reach Truck \$ \_\_\_\_\_ Turret Truck \$ \_\_\_\_\_ Pallet Jack \$ \_\_\_\_\_

Labor & Parts warranty on service repairs: Labor; (Must be at least 90 days) \_\_\_\_\_, Parts; (Must be at least the OEM's warranty) \_\_\_\_\_.

New Truck Warranty: High Ware Items; \_\_\_\_\_days, Major Components; \_\_\_\_\_days

Freight on service invoices (Y/N); \_\_\_\_, (If yes, please specify how these costs will be determined.)

**Labor or PM Rate Increase Requirements**

To increase your labor or PM rate for this account, the following requirements will need to take place:

- Labor rate or PM rates can only be increased at any location once annually.
- The Labor and PM increase can't exceed 2% and a 90-day advance notification must be issued in writing.

The amount of the Labor Rate or PM increase will need to be communicated to LTM Services. Please provide the old rate, the last increase date, the new rate, and the new effect rate date. Any work started prior to the customer's approval needs to be billed at the old rate.

**Planned Maintenance:**

PM rates should be based on current PM rates at this location. If this is a new location you are servicing, please be sure to indicate the current PM rates on page 1 of this document. Please submit a formal PM agreement to LTM Services within 5 business days from the submission of this document. This agreement must adhere to the following:

- PM pricing must include all supply costs (except oil and filter on IC oil changes)
- No travel permitted on PM's.
- No misc, flat fees, sur-charges permitted.
- No parts permitted to be billed on PM's.
- Work found on a PM should be completed under a separate work order and invoice.
- PM Check sheet will need to be attached on PM Invoices.
- PM's to be completed every 90 days or 500-hours, whichever comes first.
- Any other scheduled maintenance like 1000-hour, 2000-hour, gearbox, transmission or hydraulic services, should be approved by LTM prior to scheduling the service.

**Rentals**

- All monthly rentals must be billed for a full month, if less the rental invoice will not be accepted.

## Invoicing Submittal

Please make sure your email did comply with the following:

- All invoices and backup docs must be in a PDF **grey** scale or **color** format. (Any other format (no black and white scans) will be discarded without notice)
- The first page of your pdf **MUST** be an invoice.
- All backup docs must be scanned right behind each invoice. (The invoice and work order must be within the same attached file and the work order must be right behind the associated invoice)
- Backup Documents must be scanned pages and not pdf photos.
- Each scanned page must be a full page. We cannot accept reduced images (Invoices or work orders that are not a full page will be discarded)
- **All pages must be submitted facing Up. (Must be able to be read on a screen without having to flip any of the pages)**
- Each scanned page must be a full (8.5x11) page. We cannot accept reduced images. (Invoices or work orders that are not a full page will be discarded)
- Invoices should be grouped by type; Service, PM's, Rental, Parts, Etc. (Each group should be in a separate attachment)
- Please do not cc or bcc any other LTM email address. (This can cause invoices to be rejected)
- Please make sure you are submitting invoices on a daily basis. Do not batch into monthly submissions.
- All invoices with a service completion date, rental end date, parts shipped date or any other invoice with a date older than 90 days will not be processed and will be discarded without notice.
- The email you are using to submit your invoices **MUST** be able to accept replies. LTM Services is not responsible for any missed communications that may lead to your invoices not being processed.

Please make sure you are **not** submitting the following:

- \* Replies to disputes (you need to reply to the original pending email)
- \* Rebills for credited invoices (should be sent with the reply to the original email)
- \* Payment inquiries (please go to [www.ltmervices.com](http://www.ltmervices.com))
- \* Statements (please go to [www.ltmervices.com](http://www.ltmervices.com))
- \* Credits (should be sent with the reply to the original email)

## Invoicing Requirements

- All invoices must have an attached work order. (Either the invoice or the work order can be handle written)
- All work orders must show the techs labor hours by date.
- All parts on invoices must have an OEM part numbers, description, quantity and unit price.
- All work orders must have a start and complete date.
- All work orders must have a documented hour meter reading.
- All work orders must be signed be the customer.
- No fuel surcharges will be accepted unless approved in writing prior to the invoice.
- All misc. charges over 1% of the parts total must be broken out with detail.
- Travel cannot be portal to portal.
- All environmental fees must be related to the repair it's charged to.
- All travel / zone charges must be broken out of the labor total.
- All Invoices must include a total of Parts, Labor, Travel, Freight, Misc. Charges and Tax separately.
- Invoices with freight charges must be pre-approved by the customer and must be completed within 2 days or freight will not be approved.
- All work found from planned/scheduled maintenance must be billed separate from the PM/SM invoice.
- All Abuse, accidental damage or floor damage repairs must state such on the work order prior to the manager of the facility signing the work order. If they are not, the invoice will be processed as a normal repair and any warranties will be applied if applicable.
- Invoices must be submitted to LTM prior to 60 days from the service, rental or parts shipped date. Any invoices received after 60 days from those dates will not be processed for payment.

## Back-up Paperwork Requirements

- In order to better facilitate the approval of invoices, LTM Services will require that the dealer attach the work order for all service invoices when submitting. PM invoices should have the PM check sheet attached and "Parts Only" Invoices should have the packing slip or work order attached. Full or Complete Maintenance and rental invoices will not require back-up paperwork.

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Service Providers Signature

Please print your name

Date

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Customers Signature

Please print your name

Date