

CARRIER DISPATCHERS, OWNER-OPERATORS, SMALL FLEETS, AND DISPATCH MANAGERS

Dispatcher Load-Booking Toolkit

Move from an interesting posting to a controlled, carrier-authorized booking workflow.

Use this checklist to qualify the truck, preserve the freight source, verify the broker, review all-mile economics, obtain carrier approval, check the rate confirmation, and control the post-booking handoff. Dispatch assistance never replaces carrier authorization.

HOW TO USE IT

1. Read the gates

2. Print the worksheet

3. Record actual results

Reviewed July 20, 2026 | Complete web version: loadladder.com/resources/dispatcher-load-booking-toolkit

WORKFLOW 1 OF 6

Gate 1 - Qualify the truck

Know exactly which authorized carrier and truck the load is being evaluated for before contact begins.

[]	Identity and authority Confirm legal carrier identity, MC or DOT record, operating status, and signed dispatch authorization.
[]	Equipment Confirm trailer type, dimensions, capacity, endorsements, securement, temperature, and commodity restrictions.
[]	Availability Use expected empty location, pickup-ready time, schedule, and driver constraints.
[]	Carrier rules Know lanes, home time, rate floors, maximum deadhead, and broker or commodity exclusions.

WORKFLOW 2 OF 6

Gate 2 - Preserve the freight source

Know where the opportunity came from and what the source actually permits.

[]	Source identity Record the load board, portal, email, or connection and retain its load identifier.
[]	Availability Recheck the current posting before contact; posted freight can change or be covered.
[]	Source terms Respect credential, contact, redistribution, caching, and booking restrictions.
[]	Unknown facts List missing rate, mileage, weight, commodity, stop, appointment, or contact details as questions.

WORKFLOW 3 OF 6

Gate 3 - Verify broker and contact

Verification is separate from finding the load. Use authoritative records and the carrier's risk process.

[]	Legal identity Match company name and authority identifiers against FMCSA records.
[]	Contact integrity Compare phone, email domain, and payment instructions with the source and known records.
[]	Carrier setup Confirm packet, insurance, W-9, factoring, Notice of Assignment, and payment requirements.
[]	Fraud signals Stop on identity mismatch, rushed off-platform instructions, payment changes, or credential requests.

WORKFLOW 4 OF 6

Gate 4 - Review and negotiate

Use the full trip and stay inside the carrier's approval and rate rules.

[]	All-mile economics Include loaded miles, pickup deadhead, likely repositioning, tolls, and trip costs.
[]	Schedule economics Account for appointments, stops, dwell, weekend exposure, and reload timing.
[]	Negotiation prompts Ask about linehaul, fuel, detention, layover, TONU, stops, lumper, quick pay, and flexibility.
[]	Carrier decision Summarize verified facts, risks, and the offer, then record approval before acceptance.

WORKFLOW 5 OF 6

Gate 5 - Check the rate confirmation

Compare the written document with the approved terms before signature or dispatch.

[]	Parties Confirm broker, carrier, load number, contact, equipment, commodity, weight, and references.
[]	Stops Confirm every address, appointment, date, time, time zone, and stop requirement.
[]	Money Confirm total rate, fuel, detention, layover, TONU, stop pay, lumpers, deductions, and payment terms.
[]	Differences Resolve changes in writing rather than assuming the document will be corrected later.

WORKFLOW 6 OF 6

Gate 6 - Control the handoff

Booking creates an operating obligation. Put driver, dispatcher, broker, and documents on the same facts.

[]	Driver dispatch Provide approved instructions, appointments, contacts, requirements, and escalation protocol.
[]	Check calls Schedule updates and define immediate exception triggers.
[]	Document chain Track rate confirmation, BOL, receipts, POD, invoice, and factor-required records.
[]	Close the loop Record service, actual miles, rate changes, accessorial, payment, and lessons.

PRINT CALL AND APPROVAL SHEET

Preserve the original estimate or review. Add actual results separately so the decision process can improve.

Field	Working value
Carrier / truck	_____
Source / load ID	_____
Origin / pickup	_____
Destination / delivery	_____
Equipment / commodity / weight	_____
Loaded / deadhead miles	_____
Posted / offered / approved rate	_____
Broker legal name / MC	_____
Verified contact path	_____
Payment / factoring fit	_____
Open questions or risks	_____
Carrier approval record	_____

FINAL REVIEW

☐	Truck and schedule qualified
☐	Source and current availability confirmed
☐	Broker and contact reviewed
☐	All-mile economics reviewed
☐	Carrier approval recorded
☐	Rate confirmation matches
☐	Driver and document handoff complete

SOURCES AND BOUNDARIES

Use current authoritative records

These links are starting points for current official information. Requirements and records can change. This resource is not legal, tax, insurance, accounting, safety, or financial advice. It does not replace source terms, qualified professional review, carrier approval, or a counterparty's current requirements.

FMCSA SAFER Company Snapshot	https://safer.fmcsa.dot.gov/CompanySnapshot.aspx
FMCSA operating authority definitions	https://www.fmcsa.dot.gov/faq/what-are-definitions-motor-carrier-broker-and-freight-forwarder-authorities
FMCSA registration starting point	https://www.fmcsa.dot.gov/registration/getting-started

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