

FREIGHT BROKERS, 3PL TEAMS, CARRIER SALES TEAMS, AND LOAD COORDINATORS

Freight Broker Load Intake & Carrier Match Toolkit

Turn a shipper load request into a documented broker review and carrier handoff with commercial facts, verification status, written terms, and open exceptions kept together.

Use the browser-local builder and this printable record to structure a load brief, compare customer charge, carrier pay, direct costs, and gross margin, organize current official-record and identity review, preserve written terms, and control pickup and transaction handoff. This toolkit does not approve a carrier, verify every record, determine legal or safety compliance, guarantee payment or margin, or book freight.

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/freight-broker-load-intake-toolkit

WORKFLOW 1 OF 6

Gate 1 - Preserve customer and source authority

Keep the authorized customer source, current load availability, permitted actions, and every change attached to the working record.

[]	Customer authority Record the contracting customer, authorized contact path, broker role, load reference, date, permitted actions, restrictions, and approval owner.
[]	Current availability Reconfirm availability before carrier outreach and again before tender. Preserve cancellation, duplicate-posting, exclusivity, and competing-coverage context.
[]	Commercial source facts Keep customer charge, payment terms, credit decision, accessorial terms, service requirements, and source evidence intact.
[]	Unknowns stay open Missing source, authorization, facility, commodity, equipment, schedule, payment, or contact facts remain exceptions.

WORKFLOW 2 OF 6

Gate 2 - Build a carrier-usable load brief

Translate the customer request into a controlled brief while preserving original wording and unresolved questions.

[]	Locations and schedule Record full locations, stops, time zones, appointment type, facility hours, lead time, and dwell exposure.
[]	Commodity and equipment Record commodity, packaging, piece count, weight, dimensions, temperature or handling needs, equipment, and exclusions.
[]	Loading and delivery work Confirm assist, lumper, washout, pallet exchange, securement, seals, count, tracking, documents, and access constraints.
[]	Controlled handoff Mark version, owner, open questions, and time so quote and dispatch use the same current facts.

WORKFLOW 3 OF 6

Gate 3 - Review broker role and transaction record

The toolkit organizes general property-broker review. It does not determine registration, legal scope, contract duties, or household-goods applicability.

[]	Broker identity Use the registered brokerage identity and keep carrier, customer, agent, affiliate, and third-party roles distinct.
[]	Transaction record Prepare applicable consignor, originating carrier and registration, shipment reference, compensation, freight-charge, and payment-date records.
[]	Retention and access Apply current retention, review-access, privacy, security, and litigation-hold requirements to the controlled record.
[]	Professional review Use current law, contracts, customer rules, carrier agreements, insurer guidance, and qualified counsel.

WORKFLOW 4 OF 6

Gate 4 - Verify carrier identity through current records

Submitted packets, certificates, search results, emails, and phone numbers can be incomplete, stale, or manipulated.

[]	Match the legal identity Compare names, USDOT and docket numbers, address, known contacts, packet, insurance, agreement, confirmation, invoice, and payment instructions.
[]	Official registration record Search current FMCSA registration records in Motus and use SAFER for identity, operating-authority-status, and safety-related context. Legacy Licensing & Insurance records are historical for newer Motus activity.
[]	Independent contact Resolve conflicts through an authoritative or previously verified phone number or path, not search results, caller ID, or submitted documents alone.
[]	Insurance and packet Apply current insurance, contract, customer, safety, performance, payment, sanctions, and risk requirements. Escalate discrepancies.

WORKFLOW 5 OF 6

Gate 5 - Compare economics and preserve written terms

A positive gross margin is one input. It does not establish service fit, approval, credit, total cost, or whether the load should be booked.

[]	Gross comparison Customer charge - carrier pay - direct transaction costs. Treat overhead, claims, credit, tax, and other costs separately unless explicitly allocated.
[]	Carrier-pay context Loaded-mile shorthand excludes deadhead, time, stops, handling, market, equipment, reload, and carrier-specific factors.
[]	Written terms Preserve rate confirmation, service facts, accessorial process, tracking, documents, payment, cancellation, and every accepted change.
[]	Carrier acceptance Record who accepted, for which entity and equipment, through what authorized channel, when, and against which version.

WORKFLOW 6 OF 6

Gate 6 - Control pickup, exceptions, and closeout

Identity and transaction risk can change after initial review. Recheck critical facts at handoff and preserve the chain through payment.

[]	Pickup identity Confirm expected carrier, driver, vehicle when appropriate, facility instructions, pickup number, and stop conditions.
[]	In-transit exceptions Assign ownership for missed appointments, damage, shortages, tracking loss, breakdown, reconsignment, and unauthorized changes.
[]	Document and payment chain Preserve confirmation, shipment references, pickup and delivery evidence, accessorial support, invoices, notices, changes, disputes, and payment dates.
[]	Closeout and learning Compare planned and actual service, costs, accessorial recovery, documents, exceptions, fraud signals, customer outcome, and margin.

PRINT BROKER LOAD INTAKE AND CARRIER HANDOFF RECORD

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

Field	Working value
Customer source / authority / load ID	_____
Origin / destination / stops	_____
Pickup / delivery / time zones	_____
Commodity / pieces / weight / dimensions	_____
Equipment / handling / accessories	_____
Customer charge / carrier pay	_____
Direct costs / loaded miles	_____
Carrier pay per mile / gross margin	_____
Carrier legal name / USDOT / docket	_____
Official record / contact review time	_____
Written terms / acceptance / version	_____
Exceptions / stop conditions / decision	_____
Decision owner / time	_____

FINAL REVIEW

☐	Customer source, authority, load ID, availability, and restrictions preserved
☐	Locations, appointments, commodity, weight, equipment, and handling facts confirmed
☐	Broker identity, scope, customer terms, and record requirements reviewed
☐	Carrier identity and current authority reviewed in official FMCSA records
☐	Carrier contact independently confirmed through an authoritative path
☐	Insurance, packet, contract, payment, and customer requirements reviewed
☐	Rate confirmation, terms, acceptance, and change history preserved in writing
☐	Pickup identity, transaction record, exceptions, and closeout prepared

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.

Current 49 CFR part 371 - Brokers of Property	https://www.ecfr.gov/current/title-49/subtitle-B/chapter-III/subchapter-B/part-371
FMCSA Motus Registration Search	https://motus.dot.gov/
FMCSA Move into Motus	https://www.fmcsa.dot.gov/registration/move-motus
FMCSA L&I; transition notice	https://www.fmcsa.dot.gov/faq/what-can-i-do-licensing-and-insurance-li
FMCSA Broker and Carrier Fraud and Identity Theft	https://www.fmcsa.dot.gov/mission/help/broker-and-carrier-fraud-and-identity-theft
FMCSA SAFER Company Snapshot	https://safer.fmcsa.dot.gov/CompanySnapshot.aspx

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