

SHIPPERS, TRANSPORTATION MANAGERS, PROCUREMENT TEAMS, SHIPPING COORDINATORS, AND PRIVATE-FLEET TEAMS

Shipper Freight Tender & Carrier Review Toolkit

Turn a truckload shipment request and entered carrier quotes into a documented shipper review with commercial scope, current registration and identity checks, written tender terms, and open exceptions kept together.

Use the browser-local builder and this printable record to structure shipment facts, compare up to three entered carrier charge and transit options, review current FMCSA registration and identity records, preserve insurance and written tender controls, and manage pickup through closeout. This toolkit does not select or approve a carrier, verify every record, determine legal, insurance, or safety compliance, guarantee service or price, or tender 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/shipper-freight-tender-toolkit

WORKFLOW 1 OF 6

Gate 1 - Preserve shipment source and scope

Keep the authorized source, current version, internal owner, and every material change attached to the working record.

[]	Shipper authority Record the legal shipping entity, authorized owner, shipment reference, approval scope, confidentiality needs, and change authority.
[]	Locations and schedule Record complete locations, stops, time zones, facility hours, appointment type, ready time, delivery requirement, and dwell exposure.
[]	Cargo and equipment Record commodity, authorized value context, packaging, pieces, weight, dimensions, equipment, handling, loading, and exclusions.
[]	Unknowns stay open Missing cargo, facility, equipment, schedule, accessorial, contact, insurance, security, or special-rule facts remain exceptions.

WORKFLOW 2 OF 6

Gate 2 - Normalize entered quotes

Preserve each original quote and compare the same commercial and service scope without turning the lowest number into a recommendation.

[]	Same commercial scope Identify treatment of fuel, stops, tolls, loading, detention, lumper, layover, TONU, tracking, equipment, and other expected charges.
[]	Estimated total Add entered freight charge and expected accessories only. Do not present the result as a final invoice, market price, or total landed cost.
[]	Service context Record pickup commitment, transit definition, appointment fit, tracking, communication, constraints, and exception effects.
[]	No automatic winner Carrier fit, service, risk, capacity, cargo, contract, performance evidence, and authorized human judgment remain separate.

WORKFLOW 3 OF 6

Gate 3 - Verify identity and current registration

Packets, certificates, search results, emails, websites, and phone numbers can be incomplete, stale, or manipulated.

[]	Current Motus record Search current FMCSA registration records in Motus, especially for activity after May 18, 2026. Legacy Licensing & Insurance is historical for newer Motus activity.
[]	SAFER context Compare names, USDOT and docket numbers, entity type, status, address, official phone, equipment context, and public safety-related fields.
[]	Independent contact Resolve conflicts through an authoritative or previously verified number or path, not caller ID, search results, or submitted documents alone.
[]	Entity alignment Match the official entity with the quote, contract, tender, pickup identity, receipt or bill of lading, invoice, and payment instructions.

WORKFLOW 4 OF 6

Gate 4 - Apply insurance and operating requirements

Federal minimum financial responsibility is not the same as cargo coverage, contract requirements, shipper risk tolerance, or load-specific carrier fit.

[]	Applicable public liability Identify the current federal, state, intrastate, commodity, hazardous-material, vehicle, and operating rules that apply.
[]	Cargo and contract coverage Review limits, exclusions, deductibles, commodities, equipment, temperature, theft, high-value, geographic, subcontracting, and notice terms.
[]	Shipment capability Review equipment, capacity, facility, permit, handling, security, temperature, tracking, route, appointment, and customer controls.
[]	Professional boundary Use current law, contracts, insurer or broker guidance, qualified safety and compliance personnel, and counsel where appropriate.

WORKFLOW 5 OF 6

Gate 5 - Tender one version and protect pickup

A quote is not a tender, a sent tender is not acceptance, and initial verification can go stale.

[]	Written tender Preserve entity, rate, included charges, equipment, cargo, locations, appointments, accessorials, tracking, documents, cancellation, claims, and changes.
[]	Acceptance Record who accepted for which entity and equipment, through what authorized channel, at what time, and against which version.
[]	Pickup identity Confirm expected carrier, driver, vehicle when appropriate, pickup number, facility instructions, cargo-release authority, and stop conditions.
[]	Facility plan Provide safe access, check-in, loading, count, seal, paperwork, detention, assist, communication, and escalation instructions.

WORKFLOW 6 OF 6

Gate 6 - Control documents, claims, and closeout

Preserve the original estimate, accepted version, operating events, and final result instead of overwriting them.

[]	Receipt or bill of lading Prepare applicable shipment identifiers, parties, locations, package and commodity description, weight, signatures, and exceptions.
[]	In-transit exceptions Assign ownership for delay, rejected freight, damage, shortage, seal or temperature issues, tracking loss, accident, storage, and redelivery.
[]	Claim path Preserve written notices, shipment and delivery records, condition evidence, invoices, inspection, salvage, communications, mitigation, and deadlines.
[]	Closeout Compare entered and final charges, transit, service, documents, exceptions, claim status, invoice support, and decision quality.

PRINT SHIPPER TENDER AND CARRIER REVIEW RECORD

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

Field	Working value
Shipment reference / shipper owner	_____
Lane / stops / appointments / time zones	_____
Cargo / equipment / handling / accessorials	_____
Loaded miles	_____
Option A charge / accessorials / transit	_____
Option B charge / accessorials / transit	_____
Option C charge / accessorials / transit	_____
Selected candidate / estimate / spread	_____
Carrier / USDOT / docket / Motus / SAFER	_____
Independent contact / review time	_____
Insurance / contract / cargo review	_____
Tender / acceptance / version / pickup	_____
Documents / exceptions / claim / closeout	_____
Decision owner / conditions / time	_____

FINAL REVIEW

☐	Current shipment facts, scope, unknowns, and entered quote definitions preserved
☐	Candidate registration reviewed in Motus and SAFER; contact independently confirmed
☐	Applicable public-liability, cargo, contract, and shipper requirements reviewed
☐	Written tender, terms, acceptance, and change history preserved
☐	Pickup identity, facility release, substitutions, and fraud stop conditions prepared
☐	Receipt or bill of lading, exceptions, claims, invoice support, 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.

FMCSA Motus Registration Search	https://motus.dot.gov/
FMCSA Move into Motus	https://www.fmcsa.dot.gov/registration/move-motus
FMCSA SAFER Company Snapshot	https://safer.fmcsa.dot.gov/CompanySnapshot.aspx
FMCSA Broker and Carrier Fraud and Identity Theft	https://www.fmcsa.dot.gov/mission/help/broker-and-carrier-fraud-and-identity-theft
Current 49 CFR part 387 - Financial Responsibility	https://www.ecfr.gov/current/title-49/subtitle-B/chapter-III/subchapter-B/part-387
Current 49 CFR part 373 - Receipts and Bills	https://www.ecfr.gov/current/title-49/subtitle-B/chapter-III/subchapter-B/part-373
Current 49 CFR part 370 - Freight Claims	https://www.ecfr.gov/current/title-49/subtitle-B/chapter-III/subchapter-B/part-370

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