

Company Name:

Prepared by:

Date:

FTL Shipment Booking Checklist

A Step-by-Step Pre-Shipment Guide for First-Time U.S. Shippers

SECTION A — BEFORE REQUESTING A QUOTE

Freight Information Checklist

- Total shipment weight confirmed
- Pallet count verified
- Freight dimensions measured
- Commodity description ready
- Pickup ZIP code confirmed
- Delivery ZIP code confirmed
- Pickup date identified
- Delivery requirements noted
- Special handling requirements identified
- Temperature requirements confirmed
- Hazmat status verified
- Oversized freight requirements reviewed

S&S Insight:

Incomplete freight information is one of the biggest causes of pricing changes and pickup delays.

SECTION B — BOOKING THE LOAD

Carrier / Broker Coordination Checklist

- Quote received
- Fuel surcharge clarified
- Accessorial charges reviewed
- Transit time confirmed
- Trailer type confirmed
- Carrier MC/DOT verified
- Pickup appointment scheduled
- Delivery appointment scheduled
- Driver contact process confirmed
- Tracking method confirmed

S&S Brokerage Insight:

Most first-time shipping issues happen because appointment details and accessorial expectations are not clarified before dispatch.

SECTION C — DOCUMENTATION CHECKLIST

- Bill of Lading (BOL) prepared
- Packing list attached
- Commercial invoice ready (if applicable)
- Hazmat paperwork attached
- Delivery instructions documented
- Receiver contact information included

S&S Brokerage Insight:

Always keep signed shipment documents stored digitally for claims and billing protection.

SECTION D — PICKUP DAY CHECKLIST

- Freight wrapped and secured
 - Pallets labeled correctly
 - Dock access instructions shared
 - Pickup contact available onsite
 - Driver checked in successfully
 - Trailer inspected before loading
 - Freight count verified before departure
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SECTION E — IN TRANSIT MONITORING

- Shipment tracking active
- Receiver updated with ETA
- Delay communication process established
- Emergency contact available

S&S Brokerage Insight:

Long-haul shipments benefit from proactive communication before delays become delivery problems.

SECTION F — DELIVERY & CLOSEOUT

- Receiver inspected freight
- POD signed and collected
- Damage noted before signing

- Invoice reviewed against quote
- Accessorials verified
- Shipment documents archived

Need Help Coordinating Your Next FTL Shipment?

S&S Brokerage helps businesses across the U.S. coordinate truckload freight with reliable carrier capacity, real-time communication, and operational support.

Whether you're moving your first load or managing ongoing freight lanes, our team helps simplify the process from pickup to delivery.

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