



FREIGHT BROKER 101 TRAINING FOR BEGINNERS

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Freight Broker 101 Training for Beginners

Introduction

Welcome to **Exodus Dispatching and Training's Freight Broker 101 Training for Beginners**. The purpose of this entry-level type of Freight Broker 101 Training for Beginners is to provide those interested parties with helpful information and beginner-level training as to how to become a freight broker. In addition to this ebook, live online operational training will be conducted weekly (if you enroll in the Freight Broker 101 Training platform) to help decipher and break down even further the concepts of what it is to be a broker. In addition, approved members will be given access to our website's back office area to access more resources and view recorded videos at your leisure. There is also a Facebook group, [Freight Broker 101](#), which is a private members-only group in which we share ideas and concepts on what it is to be a good freight broker. Welcome aboard and enjoy the ride!

The goal of this Freight Broker 101 Training for Beginners is to give you the information needed and to point you in the right direction. ***It is ultimately up to the individual (you) to apply what you learn when starting your own businesses in order to grow and succeed.*** Best wishes to all who have joined this training and thank you.

Pre-Requisites to Freight Brokering

Prior to applying to become a freight broker, as well as the information that is asked of you while filling out the **OP-1 form** on the FMCSA website, you first would need to be established as a business. The OP-1 form, which will be covered later, is the form you fill out to obtain your **AUTHORITY**, whether broker or motor carrier authority.

What are some of the things needed to start a business prior to applying for **AUTHORITY**?

A. BUSINESS PLAN

A business plan is a blueprint or outline of how your company may or will run. The following are some components of your business plan:

1. **Executive Summary** – is an overview of your business plan and is usually placed last on the business plan. It includes:
 - a. Business name and location.
 - b. Business products and/or services offered.
 - c. Mission and vision statements.
 - d. Whatever the specific purpose of this plan may be, like for example, to get investors.

2. **Company Description** – is an overview of your business telling who you are, how you operate and what your goals are. It includes:
 - a. Legal structure of the business (corporation, sole proprietor, etc.).
 - b. Brief history, the nature of your business, and the needs or demands you plan to supply.
 - c. Your products/services overview, as well as customers and suppliers.
 - d. Company growth, both financial and market points.
 - e. Short- and long-term goals, and how are you going to profit.

3. **Product/Services** – describe products or services you are selling, concentrating on customer benefits. This includes:
 - a. Detail descriptions of products/services.
 - b. An explanation of the market role of what you are offering and what advantages you have over competitors.
 - c. Your product/service lifecycle.
 - d. Any important copyright, patent or trademark information.
 - e. Research and develop things that may lead to new products/services.

4. **Market Analysis** – display your industry expertise and present conclusions based on thorough market research. This includes:
 - a. An illustration of targeted customer segments, including the size and demographics of each group.
 - b. An industry description and forecast with statistics.
 - c. Current, projected and historical information marketing data for your product/service.
 - d. Evaluation of your competitors, focusing on strengths and weaknesses.

5. **Strategy and Implementation** – what are your sales and marketing strategies, and how will they be implemented with your operating plan. This includes:
 - a. How will you promote your freight broker business to customers and enter the market.
 - b. Cost details, pricing, distribution, logistics, and promotions.
 - c. How your freight broker company will function (either work from home OR brick-n-mortar) including the cycle of operations (from acquisition of supplies to production/services to delivery of services).
 - d. Sources of labor and employees, if any.
 - e. Information on operating hours and facilities.

6. **Organization and Management Team** – what will be your freight broker company's organizational structure? Identify the management team. This includes:
 - a. Organizational chart with details of departments and key employees.
 - b. Details about owners, listing names, percentage of ownership, extent of involvement within the company and biography of their skills and background.
 - c. Profiles of your freight broker company's management team, including names, positions, main duties and responsibilities, and experience.
 - d. Any advisory people, such as accountants or attorneys.

7. **Projections and Financial Plan** – may need to consult an accountant on this after completion of market analysis and goals. Important information includes:
 - a. Historical financial data, if you currently have a business. Income statement, balance sheet and cash flow statement for 3-5 years.
 - b. Prospective realistic financial information like forecasted income statements, balance sheets, cash flow statements and a budget for the next 5 years.
 - c. Financial data brief analysis on all financial statements.

- B. **EIN – Employee Identification Number**. This process is done by going to the www.irs.gov website and applying/registering for an EIN for your business name.

- C. **BUSINESS NAME** – have your business name registered with the state and pay your fees (usually a couple of hundred dollars). Register a business name within your home state or local municipality. Select a unique name and check to make sure that the name is not already used by someone else.

- D. **LEGAL BUSINESS FORMATION/STRUCTURE** – what type of business structure will your freight broker company be? The choices may include:
 1. **Sole Proprietor** – An individual who owns and operates a business normally in his or her legal name and in which there is no legal distinction between the owner and the business. In some jurisdictions the proprietor can use a trade name or business name other than his or her legal name, but the individual is also required to file a **‘doing business as (dba)’** statement with local authorities. Every asset of the business is owned by the proprietor and all debts of the business are his or hers as well. Too much personal liability.
 2. **Partnership** – A voluntary contract between two or more competent persons to place their money, effects, labor, and skill, or some or all of them, in lawful commerce or business, with the understanding that there shall be a proportional sharing of the profits and losses between them. Few people involved and not expected huge growth.
 3. **LLC (Limited Liability Corporation)** – A business structure type that combines corporation limited personal liability with partnership or sole proprietorship single taxation. Each shareholder files his or her own separate tax return. Profits and tax benefits are split any way the stockholder and shareholder entities choose. Small to medium-sized businesses. If you don’t anticipate several owners or selling parts of the company in the future. It mitigates legal obligation of owners and keeps it on the business side.
 4. **Limited Liability Partnership (LLP)** - A partnership in which some or all partners (depending on the jurisdiction) have limited liability. In an LLP, no partner is responsible or liable (directly or indirectly) for an obligation of the partnership due to another partner’s misconduct or negligence, thus shielding innocent members of these partnerships from liability.

5. **Corporation** - An artificial person or legal entity created by or under the authority of the laws of a state or nation, composed, in some rare instances, of a single person and his successors, but ordinarily consisting of an association of numerous individuals, which is regarded in law as having a personality and existence distinct from that of its several members. Corporations may own assets, and incur liabilities that do not pass to its shareholders personally.
6. **C Corporation** – allows you to issue shares in your company. Shareholders are not liable.
7. **S Corporation** – more restrictions on the number of shareholders (100), but also favorable tax treatment.

E. **OPEN A BANK ACCOUNT** – you need legal business documentation prior to opening up a business bank account. You need an **EIN** number from www.irs.gov **IRS** website and your **articles of incorporation** papers, from the Secretary of your State of Residence.

F. **PROTECT AN INTANGIBLE ASSET**

1. **Copyrights** – protection offered to authors of original content. Writings and recordings are a good example. Content on a website is another.
2. **Trademarks** – a word, name, or symbol that distinguishes your product or service. Logos are a good example.
3. **Patents** – granting of property rights on an invention.

G. **TAXES** – research what types of taxes you are responsible for. Calendar the due dates of your taxes to give yourself enough time to prepare. Understand the forms needed and whether it can be done online. Adequately budget for paying your taxes. Remember, revenue and profits are the driving forces for taxes. Also, mitigate (or reduce your taxes) and NOT avoid them. **DISCLAIMER: Always seek an accountant and/or legal counsel!** The types of taxes include:

- Federal income tax
- State income tax
- Franchise board
- Sales and Use taxes
- Payroll taxes
- City taxes
- County taxes

H. **LEGAL SERVICES** – always seek legal advice when forming a business. Some choices could be **Rocket Lawyer** (<https://www.rocketlawyer.com/>) or **Legal Zoom** (<https://www.legalzoom.com/>). These two can assist you with drafting contracts and agreements, as well as helping you decide the type of company or corporation to formulate.

What is a **Freight Broker** and their role/responsibilities?

A **Freight Broker** is a middle man/intermediary between those who have products or freight (**shippers**) and those who transport them (**carriers**). It takes drive, initiative and strategy. Brokers are a core link within one of the most vital industries in the US economy: [Transportation and Shipping/Receiving](#).

How to Succeed as a Freight Broker

So, how can you know if you're good enough for the job? Being a skillful broker begins with having great people/analytical skills. It's good to make trusting and productive relationships with all of your clients, as well as to have an attention for detail in finding the most efficient connections between shippers and carriers. It's this combination of skills that leads to successful freight brokering.

Also, remember these three (3) points that may be helpful to you when you are just starting out as a freight broker:

1. **Niche** – find a specific niche or type of manufacturer or product that a shipper specializes within and focus on that. Do not be everywhere and all over the place. You want to become skilled in just a few specific areas of the shipping industry. That way, you will begin to master those areas and build up your customer base more efficiently.
2. **Leads** – shipper leads are all over the place, starting with online searches. Begin to look to them and call inquiring about how you can assist them in moving their freight for them.
3. **Association/Membership Meetings** – there are plenty of shipper/manufacturer associations that have meetings quarterly, monthly, etc. Attend those meetings, introduce yourself, and shake hands with them explaining who you are and what service you can provide for them and their capacity. Know your role before going to these meetings.

It's also becoming common for owner operators to become freight brokers as well. This allows them to broker their truck and excess freight to other carriers as an additional source of income and added flexibility. They also have the advantage of already being in the industry and having many shipping connections.

Freight Broker Role/Responsibilities/Daily Duties

Some of the main duties and responsibilities of a freight broker revolve around cold calling shippers and getting them under contract. Shippers are the ones who sell the loads/freight either directly to a carrier or use a freight broker to help them move their loads.

*Say, for example, a shipper has a **target rate** on a load of **\$5000** (this amount is the most that the shipper is willing to pay). The freight broker wins the bid for the load. The freight broker takes their markup price off the top of the load (say 15% or \$750) and then re-sells the load to the carrier for **\$4250** (\$5000 - \$750). This is one way of how the process works.*

Also, maintaining a steady daily workflow of freight brokering, including posting loads (on load boards), setting up carriers under your brokerage (through carrier packets, approval through compliance, and rate confirmations), and finally booking loads and invoicing.

Learning the **4 R's** to freight brokering can be helpful to your success:

1. **Research** – this is where you as a freight broker will research shipping and manufacturing companies in an effort to contract with them for their loads. This can be done through cold calls, emails, and/or on-site visits.
2. **Reach out** – to those prospective shippers and/or manufacturers through the communication channels that are most effective for you, i.e., cold calls, email, visits.
3. **Relationship** – work to build relationships with anyone in the companies. It usually starts with the “gate keeper” (or the person you first come in contact with when you first call), then the shipper or logistics manager. Better relationships will begin to grow as you broker more loads for the shipper/manufacturer.
4. **Return** – after assisting shippers under contract move their freight in a professional manner, the probability of return business increases favorably.

Freight Broker sample workflow

6 a.m. to 8 a.m. – check your emails, update your loads from load boards or even make changes; begin calling east coast time zone shipping/manufacturing prospects.

8 a.m. to 9 a.m. – update loads, check all posted freight, and continue calling east coast time zone shipping/manufacturing prospects.

9 a.m. to 11 a.m. – post, check, and update loads; begin calling central time zone shipping/manufacturing prospects.

11 a.m. to noon - post, check, and update loads; begin calling west coast time zone shipping/manufacturing prospects.

Noon to 1 p.m. – LUNCH

1 p.m. – 2 p.m. - post, check, and update loads; finish calling west coast time zone shipping/manufacturing prospects.

2 p.m. – begin prospecting shippers/manufacturers and making your call contact sheet for the next day (50 to 100 calls).

5 p.m. – END OF YOUR WORK. Be sure your work area is prepared for the next day (clean, organized, etc.).

As you build up your shipper customer base, your work schedule may be cut in half (say 6 a.m. to noon or 1 p.m.), because you have enough loads to move for the day.

Working Capital

Usually, freight brokers obtain working capital in one of 3 ways:

1. **Obtaining a line of credit from a bank** – getting a line of credit from a bank may be the easiest of the 3 depending on your credit history and score. If you are new, though, this can affect you because now you need collateral. Also, a line of credit may not be the **best** option because of the interest rates (as high as **17%, ouch!**), depending on your score.
2. **Factoring companies (receivables financing)** – **account payables is what you owe to someone; account receivables is what is owed to you.** Factoring may be a good option for you. Factoring is when an invoice, B.O.L. (Bill of Lading) is sold to a financial institution. A percentage of the invoice is paid to the financial institution for a fee. A downside to factoring is that most factoring companies for freight brokers have what is called a “**reserve**”. This is a small percentage of the invoice in which the factoring company holds until they receive payment from your customer (the shipper) for that invoice. After they have received it, they will release it.

3. **Savings** – is the best and most absolute cost efficient way to finance your business. If you are able to save approximately 6 months to even a year of expenses, you can use that to pay carriers as well as other expenses, setting yourself up to make the most amount of income. Put the money back into your pocket.

Freight Brokers are also the ones with whom the legal compliance (**FMCSA and IRS**) and financial responsibilities (**authority, bond/trust, processing agent and insurance**) lay. They are responsible and liable for maintaining the broker authority, BOC-3 processing agent expenses, broker bond responsibilities (whether it is BMC-84, Surety Bond or BMC-85, Trust Fund), as well as Insurance (General Liability and Contingent Cargo).

Freight Agent Role/Responsibilities/Daily Duties

The role, responsibilities and daily duties of the freight broker agent is simple and similar to that of the freight broker. Agents generate customers (shippers), solve their freight needs by moving their loads, making sure everything is smooth and timely. Different types of paperwork, such as simple contracts between the shipper and brokerage and the broker/carrier agreement are the responsibility of the freight agent. Checking safety records of carriers and credit ratings of shippers is also a duty of freight agents. Billing payables and receivables is also a function that freight agents take on. Freight agents follow the 4 R's. Freight agents do not have legal compliance (**FMCSA and IRS**) or financial responsibilities (**authority, bond/trust, processing agent and insurance**). These legal and financial obligations fall upon the freight broker.

Basic requirements to becoming a **FREIGHT BROKER**

So now that you have received your EIN from the IRS, registered your freight broker business name, and have established a legal structure for the freight broker business (sole proprietor, partnership, or LLC), now it is time to officially become a freight broker. What are the requirements or steps involved in becoming a freight broker?

The FMCSA monitors and ensures compliance with motor carrier safety (all carriers) and **commercial** (for-hire, non-exempt carriers) regulations. Companies may find they are subject to registration requirements for both safety (safety registration) and **commercial regulation (operating authority registration)**. Companies subject to the safety requirements are also required to obtain a USDOT Number.

The FMCSA registration process requires that companies define the type of Motor Carrier, Broker, Intermodal Equipment Provider (IEP), Cargo Tank Facility, Shipper and/or Freight Forwarder business operation they plan to establish.

1. **What are the steps in the **FMCSA Registration Process**?**
 - a. Determine **FMCSA registration needs/requirements**. Are you new to registration or updating?
 - o **USDOT** and/or Hazardous Material (HM) Safety Permit Registration. Do I need a **USDOT** as a **freight broker**? Go to <https://www.fmcsa.dot.gov/registration/do-i-need-usdot-number-1> to find out. Once it is determined that you need a USDOT as a freight broker, you will be taken to the **URS (Unified Registration System)** section of the FMCSA website at <https://portal.fmcsa.dot.gov/UrsRegistrationWizard/> to continue.
 - o Get **AUTHORITY** to operate - In general, companies that do the following are required to have interstate Operating Authority (MC number) in addition to a DOT number:

- Transport passengers in interstate commerce (for a fee or other compensation, whether direct or indirect)
- Transport federally-regulated commodities **owned by others or arranging for their transport** - Brokering, (for a fee or other compensation, in interstate commerce)

FMCSA operating authority is often identified as an "**MC**," "**FF**," or "**MX**" number, depending on the type of authority that is granted. ***MC is a Motor Carrier operating in US and Canada; FF is a Freight Forwarder; and MX is a Motor Carrier operating in Mexico.*** Unlike the USDOT Number application process, a company may need to obtain multiple operating authorities to support its planned business operations. Operating Authority dictates the type of operation a company may run and the cargo it may carry.

- Already have a USDOT or AUTHORITY?** Then go here: https://li-public.fmcsa.dot.gov/LIVIEW/PKG_REGISTRATION.prc_option to register.
- Determine **state notification/registration requirements** at <https://www.usa.gov/state-tribal-governments>.
- Begin New Entrant Safety Assurance Program.** New Entrant Safety Assurance Programs affect U.S. and Canada-based motor carriers. New Entrant is a motor carrier not domiciled in Mexico that applies for a U.S. Department of Transportation (DOT) identification number, in order to initiate operations in interstate commerce. Go to <https://www.fmcsa.dot.gov/safety/new-entrant-safety-assurance-program> for details.
- Maintain or Update USDOT number and Operating Authority information.** Any time a carrier or other regulated entity changes its name or address, or other details in their record, they should update their US DOT and operating authority record with FMCSA in a timely manner. In addition, FMCSA requires all entities under its jurisdiction to update their information every two years (Biennial). Go to <https://www.fmcsa.dot.gov/registration/updating-your-registration> for details.

Apply for **AUTHORITY** from the **FMCSA** website at <https://www.fmcsa.dot.gov/registration/get-mc-number-authority-operate>.

This involves applying through the 1. **URS – Unified Registration System** - for new applicants **or** 2. Filling out the **Broker of Property (except Household Goods)** form **OP-1** for existing Brokers who want to update their authority at <https://www.fmcsa.dot.gov/registration/form-op-1-application-motor-property-carrier-and-broker-authority>.

There are **two (2) types of authority as it relates to becoming a broker**: **Broker of Property (except Household Goods)** and **Broker of Household Goods**. Generally, most new applicants choose **Broker of Property** (except Household Goods).

Property Broker - An entity that arranges for the interstate transportation of cargo belonging to others, using for-hire motor carriers subject to the commercial registration requirements to provide the actual transportation. This is where you can broker the standard types of commodities out there on the various equipment types needed to do so.

An individual, partnership, or corporation that receives payment for arranging the transportation of property (**excluding household goods**) belonging to others by using an authorized Motor Carrier. ***A Broker does not assume responsibility for the property and never takes possession of it.***

The processing fee for applying for your AUTHORITY is \$300. This is non-refundable and is collected during the application process.

The processing time taken to complete the application and return its results to you is approximately 4-6 weeks.

2. Getting your Surety Bond (BMC-84) or your Trust Fund (BMC-85).

Why do you need a bond? The FMCSA requires brokers to have a bond as a show of financial responsibility and to protect the carriers from being screwed by non-paying brokers. The amount is **\$75,000** on behalf of the brokers. The **Surety Bond (BMC-84)** is credit-based and the **Trust Fund (BMC-85)** is asset-based and deposited directly into a bond. ***It is also recommended to apply for a bond or trust while you are applying for your authority. Sometimes the FMCSA may delay approving you for authority if you do not have a bond established.***

Surety Bond (BMC-84) – a surety bond or surety, is a promise by the individual to pay one party (being the individual to whom services were received from - **CARRIER**) a certain amount if the second party (whom requested the services provided - **BROKER**) fails to meet their payment obligations, such as fulfilling the terms of a contract. The surety bond protects the service provider against losses resulting from the principal's failure to meet the obligation.

Example: *A carrier chooses to run a load for a broker and they decide to agree on a rate. For whatever reason, the broker does not pay the carrier. The carrier can file a claim against the broker through the financial institution that the bond was created.*

The **requirements** for a **Surety Bond** are as follows:

- U.S. Citizen
- No bankruptcies in progress
- No judgements/liens more than \$1500, which shows financial irresponsibility)
- No past due child support
- No open or prior Surety claims

Trust Fund (BMC-85) – is asset based and deposited directly into a bond for use in an emergency. Go to <https://cms.fmcsa.dot.gov/registration/form-bmc-85-broker%E2%80%99s-or-freight-forwarder%E2%80%99s-trust-fund-agreement-under-49-usc-13906-o-0> to inquire about BMC-85 Trust Fund form. It falls under statute 49 USC 13906.

A trust fund is something that is backed by the individual/company. A trust fund is kind of like a savings account that you agree not to touch unless there is an emergency. The funds are deposited into a trust with a financial institution and rules are agreed upon. The funds deposited are used as collateral.

A lot of trust companies advertise that potential freight brokers can fund their trust with cash, an Irrevocable Letter of Credit (ILOC), or pay the trust company to obtain an ILOC on their behalf. A word of caution here: anyone considering a purchasing a trust fund needs to verify that the trust company is not under-funded.

The cost of the Surety Bond is between **\$900 - \$5000 per year** (this can vary), which is a percentage of the **\$75000** cost, and the range in prices is based on your credit.

3. Obtaining a Processing Agent, BOC-3.

A **Process Agent** is a representative upon whom court papers may be served in any proceeding brought against a carrier, broker or freight forwarder.

To obtain the **BOC-3** form, go to <https://www.fmcsa.dot.gov/registration/form-op-1-application-motor-property-carrier-and-broker-authority>.

Brokers are required to list process agents in each state in which they have an office and in which they write contracts. **FMCSA Regulation 49 CFR Part 366** details more about the Designation of Process Agents by Motor Carriers and Brokers at <https://www.fmcsa.dot.gov/regulations/title49/part/366> .

4. **Obtain Insurance**

Like any business, you need insurance to control legal liability. Freight brokers can be sued for deaths or injuries from a third party carrier, for not following legal contracts or for employment disputes. Having insurance is a must before you begin brokering.

This can be a bit difficult at first as you're just getting started and may not have all of the specific information an insurer will want to know about your business. But that's only a small issue at the start. Once you get going, you shouldn't have any problems. Having obtained insurance, you'll have to submit proof to the FMCSA.

NOTE: In addition to filing an application for [operating authority](#), all applicants for motor carrier, freight forwarder, and **broker** authorities must have [specific insurance](#) and [legal process agent documents on file before the FMCSA will issue the authorities](#). The required filings vary, based on the types of registrations involved.

Please note that **first-time applicants with FMCSA** must apply using [the Unified Registration System \(URS\)](#) as of December 12, 2015. **Existing registration- or authority-holders** may apply for authorities using the OP-series forms until a later date. On January 17, 2017, FMCSA [published a Federal Register notice](#) with more details on the suspension of the URS effectiveness date.

Liability (\$1,000,000) and cargo insurance (\$100,000) forms must be submitted directly (online) by the home office of the insurance company furnishing the coverage. **The FMCSA does not furnish copies of insurance forms.**

5. **UCR – Unified Carrier Registration**

Any time a carrier or other regulated entity changes its name or address, or other details in their record, they should update their **US DOT and operating authority record with FMCSA in a timely manner**. In addition, FMCSA requires all entities under its jurisdiction to update their information every **two years (Biennial)**.

UCR fees charged to a broker or leasing company in connection with such a filing shall be equal to the smallest UCR fee charged to a motor carrier, motor private carrier, or freight forwarder. The final step in the legal process is obtaining your Unified Carrier Registration (UCR). **For freight brokers**, it's relatively simple and inexpensive.

Broker USDOT update types: (<https://www.fmcsa.dot.gov/registration/updating-your-registration>)

Biennial updates (every 2 years) - Federal Motor Carrier Safety Administration (FMCSA) requires all entities under its jurisdiction to update their information every two years. You are required to provide this update every two years even if your company has not changed its information, has ceased interstate operations since the last update, or is no longer in business and you did not notify FMCSA.

Failure to complete a Biennial Update will result in deactivation of your USDOT number and may result in civil penalties of up to \$1,000 per day, not to exceed \$10,000.

Updating your information is free. We have included instructions below to help you complete your biennial update.

Broker Operating Authority update types: (<https://www.fmcsa.dot.gov/registration/updating-your-registration>)

- **Name changes** - https://ask.fmcsa.dot.gov/app/answers/detail/a_id/195
- **Reinstate** - https://ask.fmcsa.dot.gov/app/answers/detail/a_id/213/session/L3RpbWUvMTQ0Nzg3MzYwOS9zaWQvQXlsamRRQm0=
- **Revoke** - https://ask.fmcsa.dot.gov/app/answers/detail/a_id/182

Dealing with Shippers

Dealing with shippers is the single most important aspect of being a Freight Broker. If you are unable to convince a shipper to allow them to let you try to move their freight for them, you make no money. How is this process done?

A few online resources of shipping directories for finding shipping companies to call are:

<https://www.macraesbluebook.com/> **MacRae's Blue Book**

America's Original Industrial Directory Since 1893 [Login](#)

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For Purchasers

Search for Industrial and manufacturing products and services by:

Company Name / Product / Service

powered by **MacRAE'S**

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Updated 44 minutes ago
- The Rodon Group
Updated 1 hour 57 minutes ago
- DEMEL FREIGHT SYSTEMS, LLC
Updated 2 hours 32 minutes ago
- US Metal Crafters
Updated 3 hours 17 minutes ago
- KWP Products
Updated 13 hours 54 minutes ago
- Utitec, Inc.
Updated 22 hours 55 minutes ago

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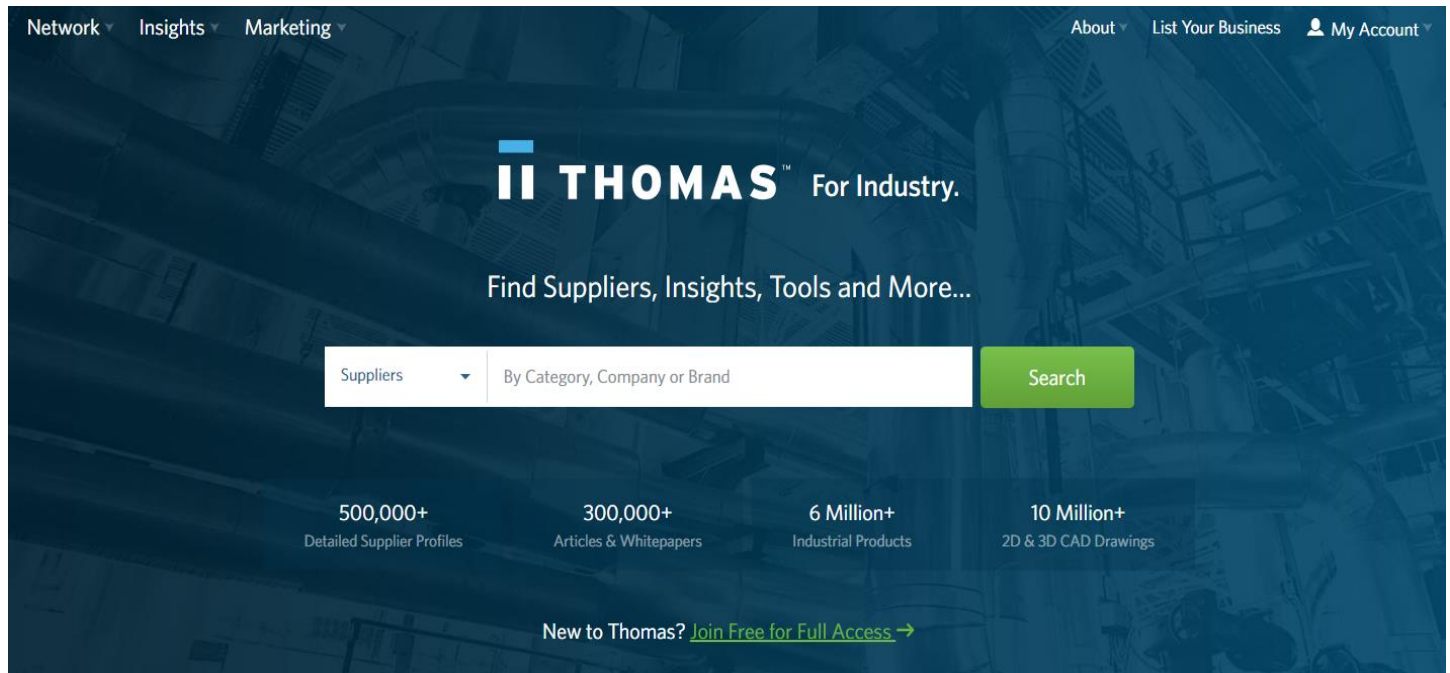
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Cold Calling

Cold calling shippers is one way to reach out to prospective shippers in an effort to get contracts to move their loads for them. What script can be used to try to get a shipper under a contract? First you have to get past the **“GATEKEEPER”**. Who is this person? The **gatekeeper** is the individual that receives the initial call and is not the person in charge but they can route you to the correct person. An example of a person classified as a gatekeeper is a **receptionist**.

Gatekeeper call script example: “Hi, my name is YOUR FIRST NAME HERE, and I am with YOUR COMPANY NAME HERE. I was wondering if you can tell me who is in charge of shipping.”

They will give you that person’s name and may even offer to transfer you through to them directly or their voicemail. Of course, this is what you want to happen. Once transferred to the person in charge, now you need to speak to them.

Shipper call script example: “Hi, SHIPPER FIRST NAME HERE, this is YOUR FIRST NAME HERE with YOUR COMPANY NAME HERE. I have trucks in your area daily and I was wondering what I need to do to help you move some freight?”

Once a shipper hears that, they will either say:

“We do not use brokers”, or

“We do not need brokers at the moment, but check back in a few months”, or

“Can you send me a lane quote” (at which time you would ask them for the lane information), or

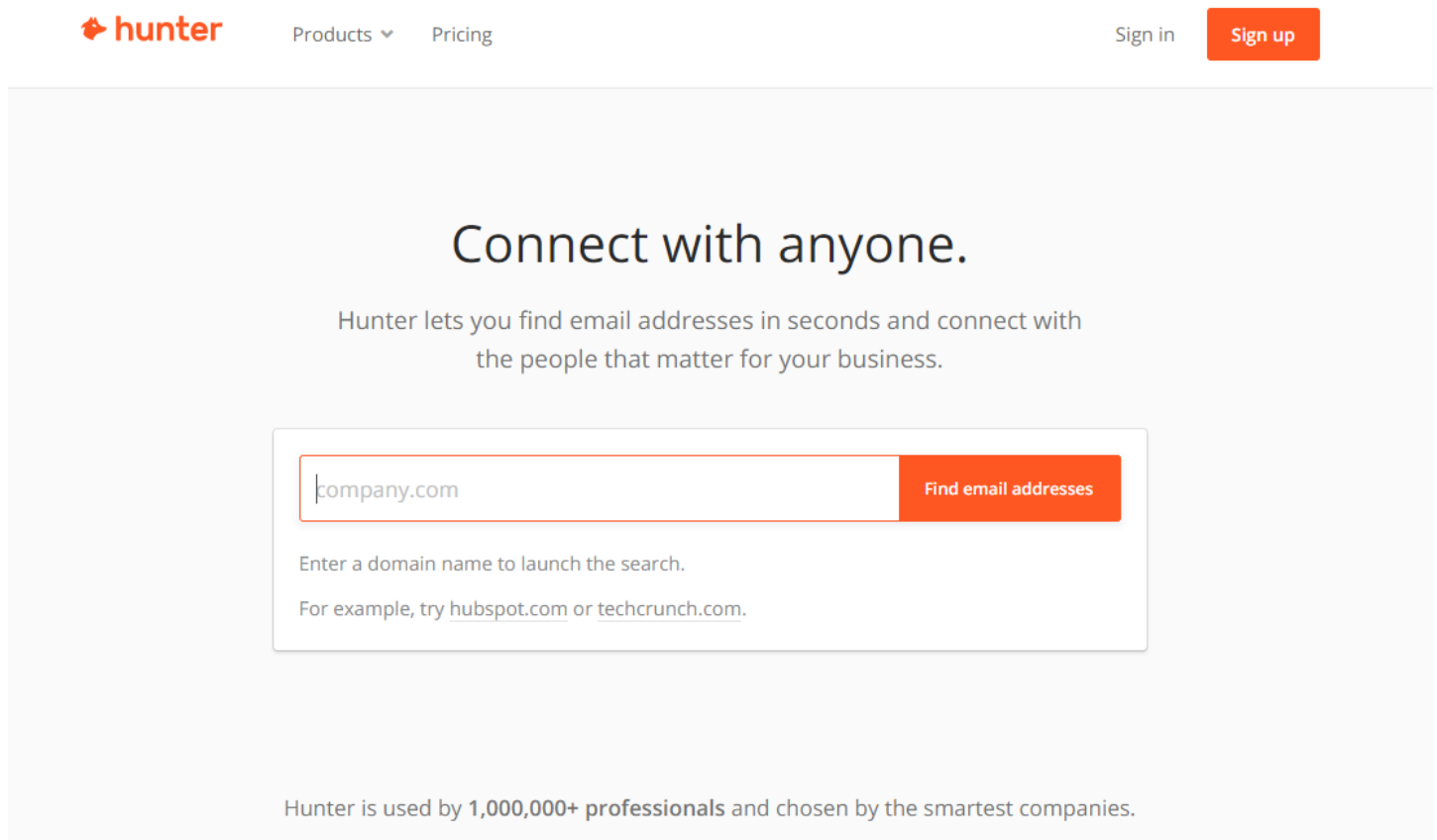
“Can you send me a shipper packet?”

One of these responses or others you will receive. Let's say the shipper wants the shipper packet from you. At this point, get their contact information, such phone number with extension and email. Send the shipper packet.

Email marketing

Email marketing is also another way to reach prospective shippers. Keep the emails short and to the point as if you were on the phone or in person with the prospective shipper.

<https://hunter.io/> **Hunter.io** is a good email resource for locating shippers.



The screenshot shows the Hunter.io website interface. At the top left is the Hunter logo, followed by navigation links for 'Products' and 'Pricing'. On the top right, there are 'Sign in' and 'Sign up' buttons. The main heading reads 'Connect with anyone.' Below this, a sub-headline states 'Hunter lets you find email addresses in seconds and connect with the people that matter for your business.' A search form is centered, featuring a text input field with 'company.com' and a 'Find email addresses' button. Below the form, instructions read: 'Enter a domain name to launch the search. For example, try [hubspot.com](https://www.hubspot.com) or [techcrunch.com](https://www.techcrunch.com).' At the bottom of the section, a statistic states 'Hunter is used by 1,000,000+ professionals and chosen by the smartest companies.'

Personal visits to companies

If you have shippers who are local to where you live, drive to these locations and try to speak directly to the people in charge of shipping. The benefit of this is that they see you in person and you shake their hands and actually speak with them.

Consider joining social media shipping and transportation groups

Facebook, **LinkedIn**, and even **Twitter** or **Instagram** may have shipping, logistics or transportation groups you can request to join. They may ask you a series of questions from the administrator of the group. Once approved to join the group, you can now begin to network with them and offer your service as a freight broker/agent wanting to move their freight/loads.

Consider joining Shipping Associations/Membership meetings

There are various shipping and transportation/logistics association membership club meeting held either monthly, quarter, semi-annually, or annually at convention centers all over the country. Consider at least attending these to simply initially meet and greet. Shake a few hands and then present the service you can potentially provide for them as a broker/agent.

Broker/Shipper Packet and Broker/Carrier Packet

The two types of packets needed by the Freight Broker or Freight Agent are designed for a contract between the **Freight Broker and the Shipper (Shipper packet)** and the **Freight Broker and Carrier/Owner Operator (Carrier packet)**.

Shipper Packet contents: (What the Freight Broker sends to the Shipper to get set up for moving their loads/freight)

- **Broker Authority (MC Authority) Broker of Property (except Household Goods)**

U.S. Department of Transportation
Federal Motor Carrier Safety Administration

1200 New Jersey Ave., S.E.
Washington, DC 20590

SERVICE DATE

Service Date that the Brokerage became active!

LICENSE

MC
U.S. DOT **Brokers receive a Broker's License with their MC and DOT numbers active.**



Broker, arranging for transportation of Freight, except Household Goods!

This License is evidence of the applicant's authority to engage in operations, in interstate or foreign commerce, as a broker, arranging for transportation of freight (except household goods) by motor vehicle.

This authority will be effective as long as the broker maintains insurance coverage for the protection of the public (49 CFR 387) and the designation of agents upon whom process may be served (49 CFR 366). The applicant shall also render reasonably continuous and adequate service to the public. Failure to maintain compliance will constitute sufficient grounds for revocation of this authority.

Jeffrey L. Secrist, Chief
Information Technology Operations Division

Bond (either BMC-84 Surety Bond or BMC-85 Trust Fund)

A Federal Agency may not conduct or sponsor, and a person is not required to respond to, nor shall a person be subject to a penalty for failure to comply with a collection of information subject to the requirements of the Paperwork Reduction Act unless that collection of information displays a current valid OMB Control Number. The OMB Control Number for this information collection is 2126-0017. Public reporting for this collection of information is estimated to be approximately 10 minutes per response, including the time for reviewing instructions, gathering the data needed, and completing and reviewing the collection of information. All responses to this collection of information are mandatory. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden to: Information Collection Clearance Officer, Federal Motor Carrier Safety Administration, MC-RRA, Washington, D.C. 20590.



Broker's or Freight Forwarder's Surety Bond under 49 U.S.C. 13906

FORM BMC-84

Filer FMCSA Account Number: MC#

Bond Number:

COPY

KNOW ALL MEN BY THESE PRESENTS, that we, _____ (Name of Broker or Freight Forwarder)

of _____ (Street) _____ (City) _____ (State) _____ (Zip)

as PRINCIPAL (hereinafter called Principal), and _____ (Name of Surety)

a corporation, or a Risk Retention Group established under the Liability Risk Retention Act of 1986, Pub. L. 99-563, created and existing under the laws of the State of _____ (State) (hereinafter called Surety), are held and firmly bound unto the United States of

America in the sum of \$75,000 for a broker or freight forwarder, for which payment, well and truly to be made, we bind ourselves and our heirs, executors, administrators, successors, and assigns, jointly and severally, firmly by these presents.

WHEREAS, the Principal is or intends to become a Broker or Freight Forwarder pursuant to the provisions of Title 49 U.S.C. 13904, and the rules and regulations of the Federal Motor Carrier Safety Administration relating to insurance or other security for the protection of motor carriers and shippers, and has elected to file with the Federal Motor Carrier Safety Administration such a bond as will ensure financial responsibility and the supplying of transportation subject to the ICC Termination Act of 1995 in accordance with contracts, agreements, or arrangements therefore, and

WHEREAS, this bond is written to assure compliance by the Principal as either a licensed Broker or a licensed Freight Forwarder of Transportation by motor vehicle with 49 U.S.C. 13906(b), and the rules and regulations of the Federal Motor Carrier Safety Administration, relating to insurance or other security for the protection of motor carriers and shippers, and shall inure to the benefit of any and all motor carriers or shippers to whom the Principal may be legally liable for any of the damages herein described.

NOW, THEREFORE, the condition of this obligation is such that if the Principal shall pay or cause to be paid to motor carriers or shippers by motor vehicle any sum or sums for which the Principal may be held legally liable by reason of the Principal's failure faithfully to perform, fulfill, and carry out all contracts, agreements, and arrangements made by the Principal while this bond is in effect for the supplying of transportation subject to the ICC Termination Act of 1995 under license issued to the Principal by the Federal Motor Carrier Safety Administration, then this obligation shall be void, otherwise to remain in full force and effect.

The liability of the Surety shall not be discharged by any payment or succession of payments hereunder, unless and until such payment or payments shall amount in the aggregate to the penalty of the bond, but in no event shall the Surety's obligation hereunder exceed the amount of said penalty. The Surety agrees to furnish written notice to the Federal Motor Carrier Safety Administration forthwith of all suits filed, judgements rendered, and payments made by said Surety under this bond.

This bond is effective the 4th day of December, 2011, 12:01 a.m., standard time at the address of the Principal as stated herein and shall continue in force until terminated as hereinafter provided. The Principal or the Surety may at any time cancel this bond by written notice to the Federal Motor Carrier Safety Administration at its office in Washington, DC, such cancellation to become effective thirty (30) days after actual receipt of said notice by the FMCSA on the prescribed Form BMC-36, Notice of Cancellation Motor Carrier and Broker Surety Bond. The Surety shall not be liable hereunder for the payment of any damages herein before described

APPLICATION FOR CREDIT

THE FOLLOWING MUST BE PROVIDED AND WILL BE HELD IN STRICT CONFIDENCE

BUSINESS NAME: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP CODE: _____

PHONE NUMBER: _____ FAX NUMBER: _____

_____ CORPORATION _____ PARTNERSHIP _____ INDIVIDUAL

FEDERAL TAX ID# _____ YEARS IN BUSINESS: _____

OWNER: _____ ADDRESS: _____

CITY/STATE: _____

PHONE#: _____

A/P CONTACT: _____ PH#: _____

E-MAIL: _____

REFERENCES

BUSINESS NAME/ADDRESS

CONTACT NUMBERS

1. _____

PHONE# _____

EMAIL: _____

2. _____

FAX: _____

PHONE# _____

3. _____

EMAIL: _____

FAX: _____

PHONE# _____

EMAIL: _____

FAX: _____

Applicant has carefully reviewed the representations set forth above and certifies all such representations to be completed and correct to the best of his/her knowledge. Permission is hereby granted to verify credit information from trade & bank references and information provided, and to make all other pertinent credit inquiries as deemed necessary to make a credit determination.

X Signed: _____ **Date:** _____

- [Broker/Carrier Agreement](#)

BROKER - CARRIER AGREEMENT

This Transportation Agreement (the "Agreement"), is entered into

this ____ day of _____, 200__ by and

between _____ (hereinafter referred to as "BROKER")

and _____ (hereinafter referred to as "CARRIER").

WHEREAS, "BROKER" is a person (or company) who arranges with an operator to carry the goods of another person (or company), for compensation and by commercial motor vehicle and may be duly registered where required.

WHEREAS, "CARRIER" is a person (or company) registered ("registered" means operating under authority issued by all applicable regulatory authorities) to carry the goods (property) of another person (or company) by commercial motor vehicle for compensation (copies of Operating Authorities are attached hereto as Appendix C).

WHEREAS, the name "SHIPPER" is the customer of the BROKER, and is also known but not limited to the names consignor, consignee and receiver.

1. CARRIER REPRESENTS AND WARRANTS THAT IT:

A. is an operator of commercial motor vehicles and/or a motor carrier, authorized to provide the transportation of goods under contracts with shippers and receivers and/or brokers of materials, wares, merchandise and general commodities, and

B. shall transport the goods (property), under its own Operating Authority and subject to the terms of this Agreement, and

C. makes the representations herein for the purpose of inducing BROKER to enter into this Agreement, and

D. agrees that a Shipper's insertion of BROKER's name as the carrier on a bill of lading shall be for the Shipper's convenience only and shall not change BROKER's or CARRIER's status as defined above, and

E. will not re-broker, assign or interline the shipments hereunder, without prior written consent of BROKER. If CARRIER breaches this provision, BROKER shall have the right of paying the monies it owes CARRIER directly to the delivering carrier, in lieu of payment to CARRIER. Upon BROKER's payment to delivering carrier, CARRIER shall not be released from any liability to BROKER under this Agreement. In addition to the

Carrier Profile Sheet

Carrier Name: _____ **Date:** _____

Street: _____

City: _____ **State:** _____ **Zip Code:** _____

SCAC: _____ **Fed ID#:** _____ **MC#:** _____

Phone: _____

Fax: _____ **Email:** _____

Remit to Mailing Address: (if different from above)

Street: _____

City: _____ **State:** _____ **Zip Code:** _____

Check if we mail checks to Factoring Company

Contact Information:

Dispatcher: _____ **Main Phone:** _____

After Hours Cell or Night: _____ **Email:** _____

Operations Manager: _____ **Phone:** _____

U.S. Department of Transportation
Federal Motor Carrier Safety Administration

1200 New Jersey Ave., S.E.
Washington, DC 20590

SERVICE DATE

January 1, 2000

CERTIFICATE

MC- 000001

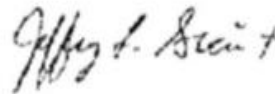
U.S. DOT No. 1000001

Sample Company Name

Sample City, State

This Certificate is evidence of the carrier's authority to engage in transportation as a **common carrier of property (except household goods)** by motor vehicle in interstate or foreign commerce.

This authority will be effective as long as the carrier maintains compliance with the requirements pertaining to insurance coverage for the protection of the public (49 CFR 387) and the designation of agents upon whom process may be served (49 CFR 366). The carrier shall also render reasonably continuous and adequate service to the public. Failure to maintain compliance will constitute sufficient grounds for revocation of this authority.



Jeffrey L. Secrist, Chief
Information Technology Operations Division

NOTE: Willful and persistent noncompliance with applicable safety fitness regulations as evidenced by a DOT safety fitness rating of "Unsatisfactory" or by other indicators, could result in a proceeding requiring the holder of this certificate or permit to show cause why this authority should not be suspended or revoked.

- [Certificate of Insurance \(COI\) – Liability \(\\$1,000,000 minimum\) and Cargo \(\\$100,000 minimum\)](#). Sometimes, Freight Brokers also want the carriers to list their brokerage as a “[Certificate Holder](#)” on the insurance.

Example Certificate of Liability Insurance (COI)

DATE (MM/DD/YYYY)

1 THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

2 **IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER	CONTACT NAME:	
	PHONE (A/C, No, Ext):	FAX (A/C, No):
INSURED	E-MAIL ADDRESS:	
	INSURER(S) AFFORDING COVERAGE	NAIC #
	INSURER A :	
	INSURER B :	
	INSURER C :	
	INSURER D :	
	INSURER E :	
	INSURER F :	

3

4

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
5	GENERAL LIABILITY						EACH OCCURRENCE \$
	<input type="checkbox"/> COMMERCIAL GENERAL LIABILITY						DAMAGE TO RENTED PREMISES (Ea occurrence) \$
	<input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR						MED EXP (Any one person) \$
	<input type="checkbox"/> Broad Form Property Damage						PERSONAL & ADV INJURY \$
	<input type="checkbox"/> Blanket Contractual						GENERAL AGGREGATE \$
	GENL AGGREGATE LIMIT APPLIES PER:						PRODUCTS - COMPI/OP AGG \$
	<input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC						\$
	AUTOMOBILE LIABILITY						COMBINED SINGLE LIMIT (Ea accident) \$
	<input type="checkbox"/> ANY AUTO						BODILY INJURY (Per person) \$
	<input type="checkbox"/> ALL OWNED AUTOS						BODILY INJURY (Per accident) \$
	<input type="checkbox"/> SCHEDULED AUTOS						PROPERTY DAMAGE (Per accident) \$
	<input type="checkbox"/> NON-OWNED AUTOS						\$
	<input type="checkbox"/> HIRED AUTOS						\$
	<input type="checkbox"/> UMBRELLA LIAB						EACH OCCURRENCE \$
	<input type="checkbox"/> EXCESS LIAB						AGGREGATE \$
	<input type="checkbox"/> OCCUR						\$
	<input type="checkbox"/> CLAIMS-MADE						\$
	<input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$						\$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY						WC STATUTORY LIMITS
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)						OTHER
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. EACH ACCIDENT \$
							E.L. DISEASE - EA EMPLOYEE \$
							E.L. DISEASE - POLICY LIMIT \$

6 DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

Form **W-9**
 (Rev. December 2014)
 Department of the Treasury
 Internal Revenue Service

Request for Taxpayer Identification Number and Certification

**Give Form to the
 requester. Do not
 send to the IRS.**

Print or type See Specific Instructions on page 2.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification; check only one of the following seven boxes: <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____ Note. For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner. <input type="checkbox"/> Other (see instructions) ▶ _____	
	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>	
	5 Address (number, street, and apt. or suite no.)	Requester's name and address (optional)
	6 City, state, and ZIP code	
	7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Note. If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.

Social security number	
	-
	-
or	
Employer identification number	
	-
	-

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

Sign Here	Signature of U.S. person ▶	Date ▶
------------------	----------------------------	--------

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at www.irs.gov/fw9.

- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
 - Form 1099-C (canceled debt)
 - Form 1099-A (acquisition or abandonment of secured property)
- Use Form W-9 only if you are a U.S. person (including a resident alien), to

- [Notice of Assignment \(NOA\)](#) – a credit form that Freight Broker fills out and return so carrier’s factoring company can do a credit check on the brokerage.

Contact Name
Address
Address
City, State/Province
Zip/Postal Code

NOTICE OF ASSIGNMENT

Dear [NAME],

This letter is intended to notify you that as of [CONTRACT DATE] your invoices payable to [CLIENT] have been assigned and transferred to [FACTORING COMPANY NAME] based on an existing agreement between us:

[SECTION OF AGREEMENT]

Please direct any further correspondence or payments to the following address:

[FACTORING COMPANY ADDRESS]

Please contact us should you have any questions.
Thank you for your cooperation.

Sincerely,

[NAME]
[TITLE]
[PHONE NUMBER]
[EMAIL]

Booking the Load – Understanding this workflow from the Broker/Shipper and Broker/Carrier perspectives

Booking a load with a carrier, from a Freight Broker's perspective, has a lot of moving parts prior to the carrier calling you on one of your posted loads asking about it.

Here is the workflow, from a BROKER/SHIPPER point of view:

- Freight Broker contracts with the shipper to move loads for them, being approved by the shipper after sending over the **Broker/Shipper packet** (see above section for details). This contracting can be done several ways, with cold calling being a common one.
- Shipper adds the Freight Broker to their email list daily for the loads that they need moved. Shippers have a "**target rate**" that they are willing to pay for the loads being moved. Sometimes the target rates are negotiable, sometimes not. ***For example, if a shipper's target rate for the load is \$5000, this is the amount that the shipper is willing to pay.*** **NOTE:** Keep in mind also that you are not the only Freight Broker that the shipper is sending emails of their load list to. Other Freight Brokers are competing with you to win the load (**bid**). Whichever Freight Broker finds a truck at the shipper's target rate, or even cheaper, wins the load (**bid**). Plain and simple.
- Once the Freight Broker wins the bid for the load (**by finding a truck and having the best target rate**), the shipper will send what is called a LOAD TENDER to the Freight Broker. The Load Tender contains details of the load. The Shipper contact information. The Freight Broker contact information. The load details, including the pickup dates and times and delivery dates and times, the commodity, rate, weight, equipment types, special instructions, etc.
- The Freight Broker now takes the Load Tender information from the Shipper and re-enters the same information into their TMS (Transportation Management System). All the information stays the same from the Shipper's Load Tender, ***except the Shipper's contact information is changed to the carrier's contact information and the rate on the Load Tender is now changed to reflect the new rate that the carrier is going to be paid.*** Remember, this is assuming a carrier has already been set up with your Freight Brokerage.
- Load is now booked for the carrier to deliver to the receiver.

Here is the workflow, from a BROKER/CARRIER point of view:

- Carrier calls the Freight Broker concerning a posted load and its availability.
- Freight Broker gets the Carrier's **MC number** to see if they are set up with the brokerage. ***One of two things will happen: either the carrier is already set up or not.***
- If carrier **is** set up with the Freight Brokerage, then negotiation of the rate will be discussed. If everyone agrees with the load details, then a rate confirmation will be sent to the carrier for signature and return. Load booked.
- If the carrier **is not** set up with the Freight Brokerage, then the Freight Broker will ask for an email to send the **Broker/Carrier** (see above Broker/Carrier packet section for details) packet to. Carrier packets will either be a PDF file attached to the email **OR** a link to a website to complete. This packet is to be completed by the carrier (or their dispatcher) and returned, along with copies of the carrier's **MC authority, Certificate of Insurance**

(listing the broker as a certificate holder), and a **W9**. If the carrier also has a factoring company, then also include a copy of the **Notice of Assignment (NOA)**.

- Once all the necessary paperwork from the carrier has been completed and returned to the brokerage, it is entered into the TMS system, processed and sent up to a compliance team for approval.
- Once approval is complete, a Rate Confirmation is produced and emailed to the carrier for signature. Load is booked.

TMS – Transportation Management System (Freight Broker Software)

TMS or Transportation Management Systems are a combination of a **CRM** system (Customer Relationship Management) and **CMS** (Content Management System). Its purpose is to centralize all the data in one location to best effectively process all information in the transportation industry. *Some of the components of TMS' are:*

- Customers
- Carriers
- Assets
- Loads
- Invoicing features
- Locations
- Document Management
- Rates

ASCEND TMS

The screenshot displays the AscendTMS Basic Plan interface. On the left is a navigation menu with options: Search, Dashboard, Loads, EDI / Tenders, Customers, Assets, Carriers, Locations, Rates, Doc Management, Reporting, Accounting, Help/Feedback, and Settings. The main content area shows the 'Organization' settings page. A blue banner at the top reads 'Welcome to AscendTMS!' and provides instructions: 'To get started, use the form below to customize the details for your organization. By replacing the temporary fake info account, you can additionally upload your company logo and enable features to customize the user experience. When you are finished customizing, press the **Save** button at the bottom of the screen to continue.' Below this is the 'Edit Your Organization' form with fields for: Name of Organization (highlighted with a red arrow), Address (with an '(Optional)' note), City, State Postal, Telephone, and Fax.



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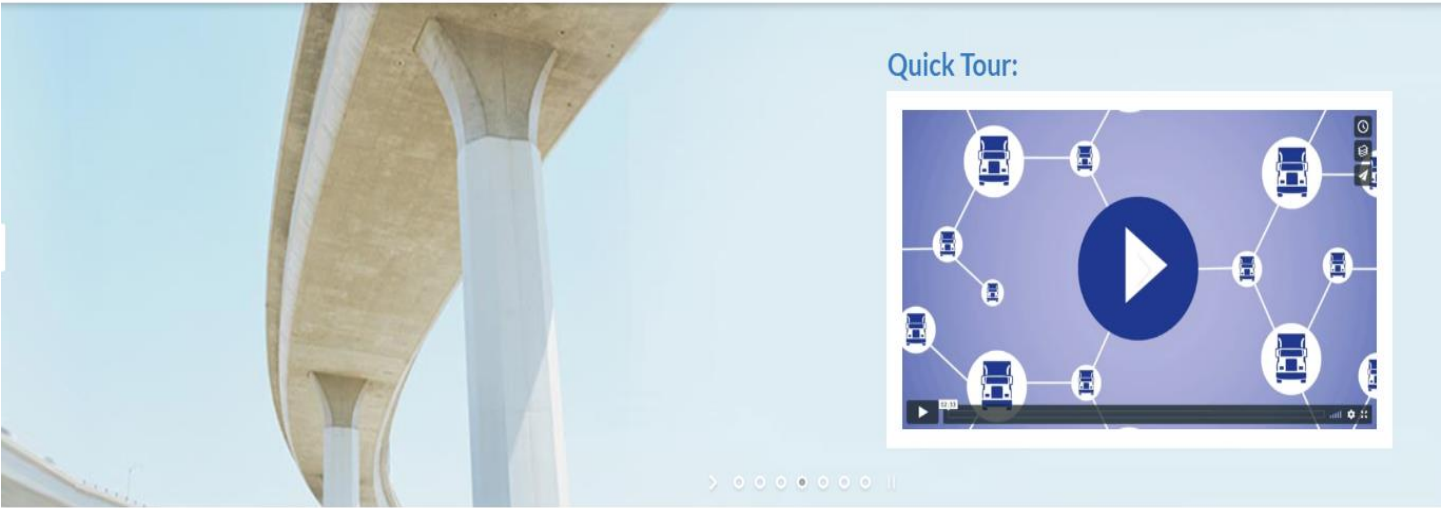
[SEE FEATURES](#) [GET STARTED](#)

Cost Summary	
Driver Cost	\$45.10
Fuel Cost per Stop	\$37.11
Entry Cost	\$0.30
Your Cost Total	\$82.51
Your Cost Per Mile	\$3.14

Profit Summary	
Price received per stop	\$5.00
Price Mile Margin (Per Mile)	\$3.27
Estimated Profit	\$0.14
Your Profit Per Mile	\$0.14

ETA Summary	
To Stop 1	08/13/2015 14:07
To Final Stop	08/13/2015 15:21
Total Driving Time	1:15

Mileage	
Loaded miles	68.30
Empty miles	21.90



Freight Brokerage

Our TMS was built for freight brokers, by freight brokers. It's more robust than anything in the industry. [More...](#)

LTL Management

Managing LTL has never been faster or more accurate. API and EDI with over 50 common carriers. [Learn More](#)

Intermodal TMS

EDI with major railroads and track free time, agents at ports, multiple pickup/delivery points, and [more...](#)

Contact Aljex

Call **(833) 262-2314** or schedule a demo today: