WORKING TEMPLATE 01 / 08

Recurring FTL lane brief

Turn a regular dispatch requirement into a scoped review, not a generic rate request.

Account / facility: _____ Owner: _____

Lane / scope ID: _____ Review date: _____

CHECK	RECORD THE ANSWER / EVIDENCE
Freight and authority	Ordering entity; payer; facility contact; person who approves a carrier. _____ _____
Movement	Pickup and delivery facilities/postcodes; normal dispatch days; weekly frequency; volume guaranteed or only estimated. _____ _____
Cargo and vehicle	Commodity; packing; gross cargo weight; piece dimensions; value; stackability; body/loading requirements. _____ _____
Time and handling	Pickup window; delivery slot; who loads/unloads; equipment; access and restraint checks. _____ _____
Documents and exceptions	Movement-document owner; POD acceptance; waiting/free time; detention; cancellation; failed delivery. _____ _____
Release and next step	Operations fit; capacity basis; pricing owner; credit review; proposed pilot; buyer review date. _____ _____

Keep sensitive buyer, shipment and personal data out of public copies. This sheet is a scoping aid, not a shipment approval, quote or contract.

WORKING TEMPLATE 02 / 08

Backup-capacity brief

Offer defined secondary cover without pretending a truck is already reserved.

Account / facility: _____ Owner: _____

Lane / scope ID: _____ Review date: _____

CHECK	RECORD THE ANSWER / EVIDENCE
Existing arrangement	Lane; incumbent retained; exact gap buyer wants covered; who can authorise overflow. _____ _____
Trigger and notice	What creates the call-off; minimum notice; frequency; peak dates; buyer decision deadline. _____ _____
Load limits	Cargo; body; weight/dimensions; exclusions; site constraints; permitted partner basis. _____ _____
Availability process	Who checks capacity; response window; named backup contact; written confirmation method. _____ _____
Price and liability	Quote expiry; waiting; cancellation; emergency changes; insurance/claims; approved credit. _____ _____
Trial and review	Defined loads or period; placement/POD measures; loss cap; stop condition; decision date. _____ _____

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WORKING TEMPLATE 03 / 08

Dedicated-fleet duty sheet

Price the actual vehicle duty before promising a monthly fleet.

Account / facility: _____ Owner: _____

Lane / scope ID: _____ Review date: _____

CHECK	RECORD THE ANSWER / EVIDENCE
Duty and demand	Site; routes; fleet count; cargo; estimated versus minimum-committed work. _____ _____
Days and shifts	Operating days; shifts; reporting windows; holiday/relief cover; loading and waiting time. _____ _____
Kilometres and cycle	Loaded and empty kilometres; realistic cycle; idle time; maintenance allowance. _____ _____
People and supply	Driver/relief responsibility; owned or partner vehicles; approved body/payload; replacement expectations. _____ _____
Commercial unit	Included days/shifts/kilometres; excess charges; fuel-adjustment rule; minimum billing; exit terms. _____ _____
Go-live gate	Site review; authority; written duty; finance approval; mobilisation cash; test and review date. _____ _____

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WORKING TEMPLATE 04 / 08

PTL comparison sheet

Compare like-for-like consignment scope, including the network and handling.

Account / facility: _____ Owner: _____

Lane / scope ID: _____ Review date: _____

CHECK	RECORD THE ANSWER / EVIDENCE
Consignment	Origin/destination postcodes; commodity; pieces; packing; actual weight; dimensions per piece. _____ _____
Chargeable basis	Volume units; agreed conversion factor and source; rounding; minimum charge; non-stackable treatment. _____ _____
Operating path	Pickup point; consolidation hubs; transshipment/handling; final-delivery coverage and access. _____ _____
Service and exceptions	Pickup cutoff; promised delivery range; fragile/high-value checks; waiting; reattempts; rejected goods. _____ _____
Rate comparison	Pickup; handling; line haul; last delivery; other charges; insurance/claims; all exclusions. _____ _____
Decision	Approved cargo and network fit; pricing owner; missing inputs; bounded test; buyer approval. _____ _____

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WORKING TEMPLATE 05 / 08

Warehouse-to-market node brief

Separate storage space, handling and transport into clear operating responsibilities.

Account / facility: _____ Owner: _____

Lane / scope ID: _____ Review date: _____

CHECK	RECORD THE ANSWER / EVIDENCE
Node and scope	Location; transport-only or managed storage; available versus proposed site; customer stock ownership. _____ _____
Stock and space	Stock profile; SKUs; pallet/loose needs; peak inventory; usable area/height; access; safety review. _____ _____
Flow and people	Inbound loads; daily orders; seasonal peaks; operating hours; labour; equipment; stock controls. _____ _____
Outbound	Delivery clusters; wave timing; drops; vehicle body; returns; proof and exception process. _____ _____
Commercial and risk	Space/handling/transport basis; inventory liability; insurance; minimums; systems cost; payment clock. _____ _____
Feasibility and release	Site/operations review; data gaps; mobilisation plan; approved cash; pilot scope; next action. _____ _____

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WORKING TEMPLATE 06 / 08

Project transport load schedule

Treat transport, lifting and site responsibilities as separate scope.

Account / facility: _____ Owner: _____

Lane / scope ID: _____ Review date: _____

CHECK	RECORD THE ANSWER / EVIDENCE
Project and buyer	Project/package; public source if used; awarded or pending; ordering party; procurement route. _____ _____
Load schedule	Cargo list; dimensions/drawings; weight distribution; value; required sequence and dates. _____ _____
Capability	Body and load suitability; actual route/site review; specialist permit or escort responsibility if applicable. _____ _____
Site interface	Gate access; ground constraints; unloading slot; labour; forklift/crane/rigging responsibility. _____ _____
Commercials	Milestones; waiting/demurrage; route change; damages/liability; supplier advances; customer receipt basis. _____ _____
Release	Operations and safety approval; exact priced scope; finance approval; authorised order; review owner. _____ _____

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WORKING TEMPLATE 07 / 08

Tender bid/no-bid file

A passed checklist supports review. It does not establish eligibility or authorise a bid.

Account / facility: _____ Owner: _____

Lane / scope ID: _____ Review date: _____

CHECK	RECORD THE ANSWER / EVIDENCE
Current notice	Portal; tender ID; issuing entity; scope; closing time/time zone; clarification route; corrigenda checked. _____ _____
Clause-to-evidence map	Mandatory clause; exact requirement; supporting document; actual bidding entity; expiry; evidence owner. _____ _____
Supply and scope	Cargo/lane/body; ownership or lease conditions; permitted partner model; capacity and service limits. _____ _____
Money and downside	Bid/performance security; exemptions verified, not assumed; mobilisation; payment; penalties; liability. _____ _____
Submission	Authorised signatory; valid digital signature; formats/uploads; internal deadline; successful submission receipt. _____ _____
Decision	Any failed mandatory gate = no bid. Missing evidence = hold. Record approvals, owner and next action. _____ _____

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WORKING TEMPLATE 08 / 08

Return-lane / network-partner brief

Check the whole operating cycle and the entity that actually pays.

Account / facility: _____ Owner: _____

Lane / scope ID: _____ Review date: _____

CHECK	RECORD THE ANSWER / EVIDENCE
Lane and counterparties	Origin/destination; direct shipper or 3PL; ordering entity; payer; procurement owner. _____ _____
Cycle compatibility	Real vehicle plan; pickup window; cargo/body fit; extra kilometres; waiting; next-job disruption. _____ _____
Partner terms	Approved subcontracting; customer-contact limits; supplier onboarding; confidential-data handling. _____ _____
Incremental value	Return revenue; added distance/fuel; toll; handling; waiting; risk; effect on next outbound job. _____ _____
Documents and money	POD acceptance; who can deduct; claims flow; advances/balances; credit limit; collection date. _____ _____
Trial and authority	Actual capacity confirmation; release owner; loss cap; written scope; escalation; repeat decision. _____ _____

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