



UNISHIPPERS' CHECKLIST FOR TRANSITIONING TO A NEW 3PL

It takes time and research to choose a third-party logistics provider (3PL), but once you select one, you're not done yet! Avoid the common headaches of transitioning your shipping solution by following Unishippers' comprehensive checklist — we'll make sure you don't miss any important steps.



Set expectations with your provider

Chat with your 3PL partner to make sure you understand their role in your shipping strategy. Also be sure to ask about their customer service hours and availability to answer questions to make sure they align with your business's hours of operation.



Review any terms and conditions

Discuss credit and payment terms with your 3PL, and be sure to fill out any necessary paperwork (such as an electronic fund transfer or credit card authorization) to ensure your first shipment is processed on time. You should also ask about any additional charges you may incur, such as credit card upcharges and late fees.



Determine a timeline for the transition

Talk with your 3PL to learn how long the transition to their shipping platform will take and create a written timeline. Include any necessary steps for onboarding, such as training and getting login access to their online platform.



Understand the onboarding process

Talk with your 3PL about their onboarding process to determine what information you can move over to the new system. Most 3PLs have an online transportation management system (TMS) that makes it easy to quickly upload your address book and other shipping information.



Discuss your billing options

Make sure you understand your 3PL's billing processes. When and how often will you receive invoices? Do you prefer electronic invoices or hard copies? Can they customize your invoice format so it works for your accounting department's specific needs?

At Unishippers, we're experts on more than just shipping. Contact our team to learn how we can take the stress out of transitioning your business shipping — and how we can help you save in the process.