



Placing a Pickup Order

IRON MOUNTAIN CONNECT™ RECORDS MANAGEMENT

T2.5.1 11.15

Placing a Pickup Order

Pickup Orders enable you to specify the type and number of boxes and files that you need to have picked up and delivered to Iron Mountain for storage.

Use this document to learn how to:

- Place a pickup order
- Confirm your pickup order
- Request vault pickup service (direct transport of tapes between your site and a secure Iron Mountain vault by a dedicated Iron Mountain vehicle)

NOTE: Refer to the *Creating a New Box* and *Creating a New File How To* documents to learn more about creating box and file records.

Placing a Pickup Order

Welcome rc2tom USA SUPPORT LOG OUT

RECORDS MANAGEMENT

Pickups, Add Records

Quick Pickup Order
Specify the number of records to be stored at Iron Mountain

Pickup List (Add Records)
Add and edit detailed information for records you will be storing at Iron Mountain.

Quick Pickup

Select the customer

Select Customer:
JSRC2 [SRVC CF,BC=B,RMT=5]
Select
ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]
JSRC2 [SRVC CF,BC=B,RMT=5]
RC2M1 [RC2M1]

Dimensions

	New	Refile
Individual Files	<input type="text"/>	<input type="text"/>
Standard Carton	<input type="text"/>	<input type="text"/>
Check Carton 24"L x 9"W x 10" H	<input type="text"/>	<input type="text"/>
<input type="text"/> x 12"W x 10" H	<input type="text"/>	<input type="text"/>
<input type="text"/> x 15"W x 10" H	<input type="text"/>	<input type="text"/>
<input type="text"/> x 6.25"W x 10" H	<input type="text"/>	<input type="text"/>

1 Select Pickups, Add Records to initiate a Quick Pickup Order.
Use the left-side navigation bar to move within the different functional areas in Iron Mountain Connect for Records Management.

2 Select the customer you are entering this pickup order for.

i The Quick Pickup Order button is already selected when you first access the Pickups, Add Records functionality.

Search, Retrieve

Pickups, Add Records

Order Supplies

Administration

Track Orders

Help Pickups (2)

100%

Placing a Pickup Order

Pickups, Add Records

Quick Pickup

Select the customer, and specify the number of new and previously stored (refile) records that you will be storing at Iron Mountain. Once complete, checkout to schedule pickup.

Select Customer: JSRC2 [SRVC CF,BC=B,RMT=5] **Add to Cart**

Customer: JSRC2 [SRVC CF,BC=B,RMT=5]

Carton/File Type	Dimensions		
 Individual Files		<input type="text"/>	<input type="text"/>
 Standard Carton	15"L x 12"W x 10" H	<input type="text"/>	<input type="text"/>
 Check Carton	24"L x 9"W x 10" H	<input type="text"/>	<input type="text"/>
 Letter Transfer Carton		<input type="text" value="12"/>	<input type="text"/>
 Legal Transfer Carton	24"L x 15"W x 10" H	<input type="text" value="18"/>	<input type="text"/>
 X-Ray Carton	15"L x 6.25"W x 10" H	<input type="text"/>	<input type="text"/>

Search, Retrieve

Pickups, Add Records

Order Supplies

Administration

Track Orders

100%

4 Add the boxes/files to your cart.

3 Enter the amount of each type of new or returning (refile) box/file you need to have picked up.

5 Click the Pickups button to open the pickup order wizard, which steps you through the order process.

Placing a Pickup Order

The screenshot displays the 'Pickup Details' page in the Iron Mountain system. The page includes a navigation menu on the left with options like 'Search, Retrieve', 'Pickups, Add Records', 'Order Supplies', 'Administration', and 'Track Orders'. The main content area shows order details for customer JSRC2, including bill-to information, PO number, and item instructions. Callouts 6, 7, and 8 provide step-by-step guidance on how to complete the order.

6 Review your order and specify the Bill to Division and/or Department.

7 Click Next to move to the Pickup Details step in the order wizard and enter shipping information.

8 If this customer uses purchase order numbers to assign and track expenses, look up and assign an active purchase order number.

Additional callouts include: 'Empty the cart and restart the order process.' and 'Return to the Quick Pickup Order screen and add additional boxes/files to the order.'

Placing a Pickup Order

9 RECORDS MANAGEMENT

Verify the pickup address and edit the contact as necessary. Click the >Change Address link to select or create a new address.

10

Verify your shipping priority and carrier.

11

Finalize your order. Your records will be picked up as specified in your order instructions and a confirmation will be emailed.

Pickup Address

RC2M1 [RC2M1]

35 Main Street

4900 SEMINARY ROAD

Address Line 3

Floor: Floor

ALEXANDRIA, VA 22311

> Change Address

Pickup Contact

RC2M1 Contact

Contact Phone

> Use My Contact Information

Shipping Priority

Normal 10/13/2015 5:00 PM EDT

Scheduled by 5:00 PM on mm/dd/yyyy

Carrier

Iron Mountain

Customer Drop Off

Third Party

Email Confirmation(s)

Primary

Jane.Smith@ironmountain.com

Additional Email

Additional Email

Order Instructions

Enter text

60 characters remaining

> Add Internal Routing Address

Customer: JSRC2 [SRVC CF,BC=B,RMT=5]

Bill To Division: DIVISION TWO

Bill To Department: DIV TWO, INS 2 FORMAT

Enter the email address of user(s) who will receive the order confirmation. The primary contact receives all order-related emails. Non-primary contacts receive confirmation emails only.

Enter any instructions that are specific to this overall order.

PO Number: JSRC2**

Confirming Your Pickup Order

IRON MOUNTAIN CONNECT
RECORDS MANAGEMENT

Welcome admin8 USA SUPPORT LOG OUT

Cart Pickup Cart

>Retrievals (1)
>Supplies (0)
>Pickups (0)

Order Complete

Thank you. Your order has been submitted.
An email confirmation will be sent to RC2Beta@ironmountain.com

Delivery Address: 4 Main Street
4421 WATERFRONT DRIVE
Floor: 3RD
GLEN ALLEN VA , 23060

Contact Name & Phone: RC2SP Contact & 8045275555
Carrier: Iron
Priority: 10/9/20

< Start a New Pickup Order

Order Number	Order Type	Item Count	View Order
155471373	Pickup	(1) Item	View Order

Search, Retrieve
Pickups, Add Records
Order Supplies
Administration
Track Orders

Information Callouts:

- The users who will receive email confirmation for this order.
- Return to the Quick Pickup Order screen and begin a new order.
- Click View Order to open the Order Information and Order History tab screens where you can review and cancel your order. Refer to [Tracking Your Orders](#) for additional information.
- Entries displayed in blue are clickable. Click the Order Number to track the order you just completed.
- Refer to the *Creating a Box* and *Creating a File How To* documents to learn more about entering boxes and files.

Placing a Vault Pickup Service Order

Pickups, Add Records

Quick Pickup

Select the customer, and specify the number of new and previously stored (refile) records that you will be storing at Iron Mountain. Once complete, checkout to schedule pickup.

Select Customer:
ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]

Customer: ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]

Carton/File Type

- Legal Transfer Carton
- X-Ray Carton
- Small Planner Carton
- Medium Plan Carton
- Large Plan Carton

15"L x 6.25"W x 10" H

Vault Pickup Service

	New	Refile
	<input type="text"/>	<input type="text"/>

1 Follow the steps in [Placing a Pickup Order](#). Customers who contract with Iron Mountain for vault pickup service will see this option at the bottom of the Quick Pickup screen.

2 Click to place a pickup order utilizing this service. The number of items in your cart will be incremented by one for the vault pickup service order after you click the Add to Cart button.

Placing a Vault Pickup Service Order

IRON MOUNTAIN® CONNECT

RECORDS MANAGEMENT

Cart Pickup Cart

>Retrievals (0)
>Supplies (0)
>Pickups (3)

Cart Items Pickup Details Order Complete

Floor:
KING OF PRUSSIA, PA 19406
USA
> Change Address
Pickup Contact

> Use My Contact Information

Customer Drop Off
Third Party

60 characters remaining
> Add Internal Routing Address

Customer: ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE] Line Items (3)

Bill To Department: ACCOUNTING DEPA

Instructions:

Line	Carton/File Type
1	Individual Files
2	Standard Carton 15"L x 12"W x 10" H
3	Vault Pickup Service

er: 4242-097978978

Instructions

Search, Retrieve
Pickups, Add Records
Order Supplies
Administration
Track Orders

Windows Taskbar: Iron Mountain Recor..., Microsoft Lync, Placing a Pickup Ord..., Untitled - Paint, 8:52 PM

Vault pickup service displays as a line item in the Items and Details steps of the pickup order wizard, on the order confirmation and in the Track Orders selection. Iron Mountain will contact the customer to set up vault pickup service.