



IRON MOUNTAIN®

# 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

**IRON MOUNTAIN® CONNECT**

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.

**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]

**Individual Files**

**Standard Carton**

**Check Carton**

**Dimensions**


	New	Refill
24"L x 9"W x 10" H		
x 12"W x 10" H		
x 15"W x 10" H		
x 6.25"W x 10" H		


**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.

# 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, 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

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.

Help

Pickups (2)

 100%



# Placing a Pickup Order

The screenshot displays the 'Pickup Details' step in the Iron Mountain Records Management system. The interface includes a top navigation bar with the Iron Mountain logo, 'Welcome rc2tom', 'USA', 'SUPPORT', and 'LOG OUT'. A left sidebar shows 'RECORDS MANAGEMENT' and a 'Cart' section with links for '>Retrievals (3)', '>Supplies (0)', and '>Pickups (2)'. The main content area is titled 'Pickup Details' and shows 'Cart : (2) Items'. It includes a description: 'Review pickup order items and specify internal billing information. Update'. Below this is an 'Empty Cart' button. A 'Next >' button is located on the right. The 'Customer' field is set to 'JSRC2 [SRVC CF,BC=B,RMT=5]'. The 'Line Items (2)' section shows a table with columns for 'Bill To Division', 'Bill To Department', 'PO Number', and 'Item Instructions'. The 'Bill To Division' is 'DIVTWO [DIVISION TWO]', 'Bill To Department' is 'INS2 [DIV TWO, INS 2 FORMAT]', and 'PO Number' is 'JSRC2\*\*'. The 'Item Instructions' field contains 'Deliver to Betty Smith (610) 772-1228 x133'. A 'Number of Returns' field is set to '12'. A 'Remove' button is visible next to the item. A bottom sidebar contains links for 'Search, Retrieve', 'Pickups, Add Records', 'Order Supplies', 'Administration', and 'Track Orders'. The status of the item is 'Standard Carton' and 'Status: New Box(es)'. Eight numbered callouts provide instructions: 1. Empty the cart and restart the order process. 2. Click Next to move to the Pickup Details step in the order wizard and enter shipping information. 3. Return to the Quick Pickup Order screen and add additional boxes/files to the order. 4. Review your order and specify the Bill to Division and/or Department. 5. If this customer uses purchase order numbers to assign and track expenses, look up and assign an active purchase order number. 6. Enter any instructions that are specific to this order item.

**1** Empty the cart and restart the order process.

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

**3** Return to the Quick Pickup Order screen and add additional boxes/files to the order.

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

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

**6** Enter any instructions that are specific to this order item.

# Placing a Pickup Order

9

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

i

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.

i

Enter any instructions that are specific to this overall order.

PO Number: JSRC2\*\*

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

Bill To Division: DIVISION TWO

Bill To Department: DIV TWO, INS 2 FORMAT

100%

# Confirming Your Pickup Order

The screenshot displays the Iron Mountain Connect Records Management interface. The top navigation bar includes the logo, user name 'Welcome admin8', location 'USA', and links for 'SUPPORT' and 'LOG OUT'. The left sidebar shows a 'Cart' section with 'Pickups (0)' selected. The main content area, titled 'Pickup Cart', shows a confirmation message: 'Thank you. Your order has been submitted.' with a green checkmark icon. Below this, the delivery address is listed: '4 Main Street, 4421 WATERFRONT DRIVE, Floor: 3RD, GLEN ALLEN VA, 23060'. Contact information for 'RC2SP Contact & 8045275555' is also shown. A table below displays the order details for 'RC2S8 [RC2S8]', including the order number '155471373', order type 'Pickup', and item count '(1) Item'. A 'View Order' button is visible. Several callout boxes provide additional information: one points to the confirmation message stating that email confirmation will be sent to 'RC2Beta@ironmountain.com'; another points to the 'Start a New Pickup Order' button; a third points to the order number in the table, noting that entries in blue are clickable; a fourth points to the 'View Order' button, explaining that it leads to order information and history screens; and a fifth points to the bottom navigation bar, referring to documentation for creating boxes and files.

**IRON MOUNTAIN® CONNECT**  
RECORDS MANAGEMENT

Welcome admin8 USA SUPPORT • LOG OUT

Cart << Pickup Cart

Pickup Items

Order Complete

**Thank you. Your order has been submitted.**  
An email confirmation will be sent to [RC2Beta@ironmountain.com](mailto: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 Mountain  
**Priority:** 10/9/20

**RC2S8 [RC2S8]**

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

View Order

**< Start a New Pickup Order**

**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.**


**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.**


**Return to the Quick Pickup Order screen and begin a new order.**

**The users who will receive email confirmation for this order.**

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

# Placing a Vault Pickup Service Order



Welcome rc2jen  USA [SUPPORT](#) [LOG OUT](#)

RECORDS MANAGEMENT

Pickups, Add Records

<<

Quick Pickup

Help


Pickups (2)

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

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

Welcome rc2jen USA SUPPORT LOG OUT

RECORDS MANAGEMENT

Cart Pickup Cart ? Help

Cart Items Pickup Details Order Complete

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

Address: Floor: Floor  
KING OF PRUSSIA, PA 19406  
USA  
> Change Address  
Pickup Contact  
hkhkjkhkhkh  
87679809809  
> 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 DEPT

Instructions:

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

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

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.**