Creating a New Box

IRON MOUNTAIN CONNECT™ RECORDS MANAGEMENT
Creating a New Box

Create new boxes with detailed information that will help if you need to search and retrieve the box in the future.

Use this guide to learn how to:

• Create a new box
• Review and edit box details from within the pickup list
Creating a New Box

1. Select Pickups, Add Records to create a new box.
2. Click Pickup List (Add Records).
3. Click Add Box.

Organizations that contract to use Iron Mountain Site Validation to validate pickup and create a traceable chain of custody, will see a variation on this screen.
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4. Select the type of box.
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Select the Customer.
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6. Enter Box Details that will be used for searching on and tracking this box. You must enter data in all required fields (marked with a red asterisk).

i. Click the Customize Layout link to set the required, enabled and disabled fields and to change the layout of the fields on this screen.

Note that your system administrator controls the fields and settings that appear on this screen when you login via a custom box template.

7. Save data entry time by locking fields that contain data that you will reuse. The data remains in the field until you unlock.

i. Save Box & Close to save all of the box details and return to the Pickup List.

OR

Save & Add Another Box to stay on this screen and continue creating boxes for the same customer.
Reviewing Your Box

1. Review your box from within the pickup list.

2. Select View. The Box Details screen opens.

You are only able to delete boxes with a status of New.
Reviewing Your Box

Click Edit to update any of the box information.
Reviewing Your Box

Save any of the changes you made to the box information.
**Reviewing Your Box**

- **Open your report**, save it to your computer or cancel it.

- **Click Export** to download a .csv file containing this pickup list for your records.

- **Click Quick Pickup Order** to schedule pickup for the boxes that you created. Refer to the Placing a Pickup Order How To training guide.

- **Open your report**, save it to your computer or cancel it.