**HOW TO**

**Prep Your Boxes for Pickup**

### STEP 1

**CHOOSE BARCODE LABELS**

**OPTION 1**
- Use RFID-ready box; includes built-in RFID barcode label and option to check one of the following (if applicable):
  - Listed
  - Imaged

**OPTION 2**
- Purchase and apply RFID Blue Label to create an RFID-ready box. Boxes will be sent directly to the shelves for storage.

**OPTION 3**
- Select and apply one of the following non-RFID labels:
  - **BLACK LABEL**
    - Boxes will be sent directly to the shelves for storage.
  - **GREEN LABEL**
    - Boxes will be individually listed and stored based on the file and box label information.
  - **ORANGE LABEL**
    - Boxes will be sent to the Document Imaging Center to be imaged for electronic retrieval.

### STEP 2

**FILL OUT THE TRANSMITTAL SHEET**

**REQUIRED FIELDS**
- Customer ID
- Division ID (if division enabled)
- Department ID (if department enabled)
- Barcode Label

**OPTIONAL FIELDS**
- Using the optional fields makes it easier to locate and manage your records. Please complete all optional fields as appropriate.
- Depending upon how your account is set up (by Division ID or Department ID, for example), your organization may be required to complete some of these optional fields. If you need assistance in learning whether yours does, please contact Customer Care.

**SEE REVERSE SIDE**
- for more information about these optional fields.

### STEP 3

**WRITE YOUR CUSTOMER ID ON THE LABELS AND AFFIX LABELS TO THE TRANSMITTAL SHEET**

**OPTION 1**
- For RFID-ready boxes, peel the smaller, identically numbered barcode label from the larger RFID label on the box and place on the Transmittal Sheet.

**OPTION 2**
- For all other labels and non-RFID-ready boxes, place the large peel-off barcode label on the box info panel as shown below.

### STEP 4

**PLACE YOUR PICKUP ORDER**
- It’s easy, and there are four convenient ways:
  - **ONLINE:** Iron Mountain Connect™
    - www2.ironmountainconnect.com
  - **PHONE:**
    - US: 1 800 934 3453
    - CANADA: 1 800 FASTFILE®
  - **EMAIL:** order@ironmountain.com
  - **FAX:** 1 800 934 5348

When placing an order, you will need to have the following information available:

- Customer ID
- Division (if division enabled)
- Department (if department enabled)
- Box count and box size
- Special instructions for the driver

### STEP 5

**READY FOR PICKUP**
- The driver will come to your site to pick up your boxes.
- Hand all transmittals to the driver. **Please do not place transmittals inside the boxes.** The driver will scan and take the boxes.
- Next, sign the scanner and your order is complete.

### TO ORDER SUPPLIES

**ONLINE:** Iron Mountain Connect™
- www2.ironmountainconnect.com
- US: 1 800 934 3453
- CANADA: 1 800 FASTFILE®

### YOUR FINAL CHECKLIST
- Are the boxes completely full?
- Are the labels/transmittals complete and in their proper location?
- Are your transmittals ready to hand to the driver? (And remember: **DO NOT** tape, staple or place the transmittals inside the boxes.)
- Did you advise Iron Mountain of any special instructions for the pickup (steps, lack of an elevator, dock access, hours, etc.)?

### HAVE QUESTIONS?

Call Customer Care at
- US: 1 800 934 3453 or
- CANADA: 1 800 FASTFILE®
## HOW TO Fill Out the Transmittal Sheet

### CUSTOMER ID (REQUIRED)
Write the four- or five-digit number on the transmittal sheet and on the large peel-off barcode label.

### CUSTOMER NAME
Write your customer name here.

### DIVISION ID
If your account is set up by division, use up to 12 alphanumeric characters to enter the Division ID of the department here. Note: You will use this field only if you are specifically set up to use divisions.

### DEPARTMENT ID
If your account is set up by department, use up to 12 alphanumeric characters to enter the Department ID.

### CUSTOMER BOX NUMBER
If, for internal tracking purposes, you assigned a carton number other than the SafeKeeper PLUS barcode number, write that number here.

### RECORD CODE
If you are set up to use extended record codes, complete blocks 7 through 10. Use up to 10 alphanumeric characters.

### DATE RANGE FROM/TO
Enter the earliest date and the most recent date (mm/dd/yyyy) of the records in the carton so that retention can be calculated.

### ALPHANUMERIC RANGE FROM/TO
- Name range (Jones through Smith)
- A numeric field range (20450 through 20567)
- An alphanumeric file ID range (AD123 through BZ784)

### CREATE DATE
This date (enter as mm/dd/yyyy) shows when the materials were packaged and labeled for storage or when the records were originally created. Retention can be calculated from this date.

### EVENT DATE
If applicable, write the date (mm/dd/yyyy) of the contents in the carton. Retention will be calculated from this date.

### DESTRUCTION ELIGIBILITY
- Check one of the destruction indicators: permanent or undefined.
- If your account is not set up to use record codes, it’s important that you provide either a destruction date or a destruction indicator to show which cartons are eligible for destruction and which should remain in storage.

### HOLD CODE
This code extends the carton’s retention period and needs to be set up in the system before using if you want the records to be kept permanently. Check the box under Destruction Eligibility.

### MAJOR DESCRIPTION
To make identification easier, describe what’s in the carton.

### MINOR DESCRIPTION
For additional ease of identification, you can enter more details about the contents of the carton here.

### REFERENCE #1
Use this field for any additional cross-reference information about the carton.

### PREPARER’S FULL NAME/DATE/DIVISION ID/DEPARTMENT ID/TELEPHONE NUMBER (WITH EXTENSION)/FLOOR
Fill in all of these fields.

### SafeKeeper PLUS® Barcode Labels
- Place large label on carton info panel
- Place small label on transmittal sheet

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