

QUICK REFERENCE GUIDE

Iron Mountain understands that you may need to change your regularly scheduled services for the next few weeks. The fastest and easiest way to make changes is through Iron Mountain Connect™, our online hub.

TO CANCEL A RECORDS ORDER THROUGH IRON MOUNTAIN CONNECT

You can cancel orders submitted to Iron Mountain but have not yet been processed (orders with a status of Submitted for Processing). You CANNOT cancel orders that were processed, are on hold, or have any status other than Submitted for Processing.

Note: Cancelled orders are permanently removed and cannot be restored. You will need to create a new order to request a future pickup or delivery.

1. Login in the Iron Mountain Connect and select the Records Management tab.
2. Within Records Management, select [Track Orders](#).
3. Click the Order Number link for the order you wish to change. The Order page opens with the Order Information tab displayed
4. Click [Cancel](#) from either the Order Information or Order History tab screen.
5. You are asked to confirm the cancellation. Click [Cancel](#) to continue.
6. The order is cancelled. You are returned to the Order List page. A banner message at the top of the page indicates the order was successfully deleted and the status of the order is set to [Cancelled](#).

EDITING COMPLETED ORDERS & REMOVING ORDER ITEMS (RETRIEVAL, PICKUP, SUPPLY)

Editing a completed order enables you to update the order details, such as delivery and address information, shipping priority and order instructions, as well as update and remove line items on the order. You are able to edit orders that:

- ▶ YOU submitted
- ▶ Have a status of Submitted for Processing

You are able to edit the following order types:

- ▶ Retrieval Orders: Image on Demand (IOD)
- ▶ Pickup Orders
- ▶ Supply Orders
- ▶ Permanent Withdrawals

Edit an order from four selections within Iron Mountain Connect Records Management:

- ▶ The **Completion** step in the Retrieval Order, Supply Order and Pickup Order wizards
- ▶ [Records Management | Track Orders](#)

NOTE – YOU CANNOT:

- ▶ Edit orders that have been processed, are on hold, or have any status other than [Submitted for Processing](#).
 - ▶ Add items to an existing order. You must create a new order to add items.
1. From the **Completion** step in any of the order wizards, click the **Order Number** link or the **View Order** button. Or, from within [Records Management | Track Orders](#), search for the order. The Order screen opens with the Order Information tab displayed.
 2. Click **Edit Order**.
 3. Update the following order details:
 - Pickup/Delivery address
 - Contact
 - Shipping Priority
 - Carrier

- Order Instructions
 - Internal Routing Address
4. Edit the billing information and instructions. The billing fields vary based on your company's records management hierarchy and service levels.
 5. Update order items:
 - Click to the right of the item you need to edit:
 - Requested For
 - Chargeback Code
 - Item Instructions
 - Click **Update** to save your changes.
 6. Remove order items:
 - Click to the right of the item you need to remove. The item is removed from this order.
 7. Click **Save**. The order is updated, and the change is noted in the **Order History**.
 8. Click **Close** to exit from the Order screen. A confirmation email is sent to the primary contact and other contacts entered on the **Order Details** screen.

TO CHANGE YOUR SHREDDING FREQUENCY THROUGH IRON MOUNTAIN CONNECT

1. Login in the Iron Mountain Connect and select the **Shredding** tab.
2. Within **Shredding Center**, select *Change my shredding frequency*.
3. Select the **Customer ID**, **Division** and **Department** from the drop-down list provided.
4. Enter your contact information in the fields provided (Requester Name, Email, Phone, Address, etc.).
5. Select a new frequency, for example, every 2 weeks or every 4 weeks, from the drop down list provided.
6. Enter a description of your request in the **Request Description** field.
7. Provide any additional instructions in the field provided.
8. Click *Submit the Request*. Iron Mountain receives your request for processing.

TO CHANGE YOUR SHREDDING SERVICE THROUGH IRON MOUNTAIN CONNECT

1. Login in the Iron Mountain Connect and select the **Shredding** tab.
2. Within **Shredding Center**, select *Change my shredding service*.
3. Select the **Customer ID**, **Division** and **Department** from the drop-down list provided.
4. Enter your contact information in the fields provided (Requester Name, Email, Phone, Address, etc.).
5. Enter a description of your request in the **Request Description** field.
6. Provide any additional instructions in the field provided.
7. Click *Submit the Request*. Iron Mountain receives your request for processing.

Need further assistance? Email AskCustomerService@ironmountain.com



[IRONMOUNTAIN.CA/GETCONNECTED](https://www.ironmountain.ca/getconnected)