

IRON MOUNTAIN CONNECT™ RECORDS MANAGEMENT SHIPPING ADDRESS QUICK START GUIDE



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IRON MOUNTAIN / GLOBAL SOLUTIONS

Document/File information

Iron Mountain Connect Records Management
Shipping Address Quick Start
March 2019

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Select Option 1 (Records Management) then Option 3 (Customer Support)

Email address: askcustomerservice@IronMountain.com

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INTRODUCTION

The personal address book has been replaced with improved centralized address functionality that system administrators control.

WHERE CAN I FIND MY PERSONAL ADDRESS BOOK?

- Personal address books have been removed.
- System administrators now create, edit and delete addresses, and enable/disable user access to addresses from within **Records Management | Administration | Manage Addresses**.
- Users review and select an address from within the Details step in the order wizard.
- Users with the proper permissions are able to create addresses while placing orders.
 - Once an address is created, it is available for use and can be set as a default address or favorite address by a user for ease of use.

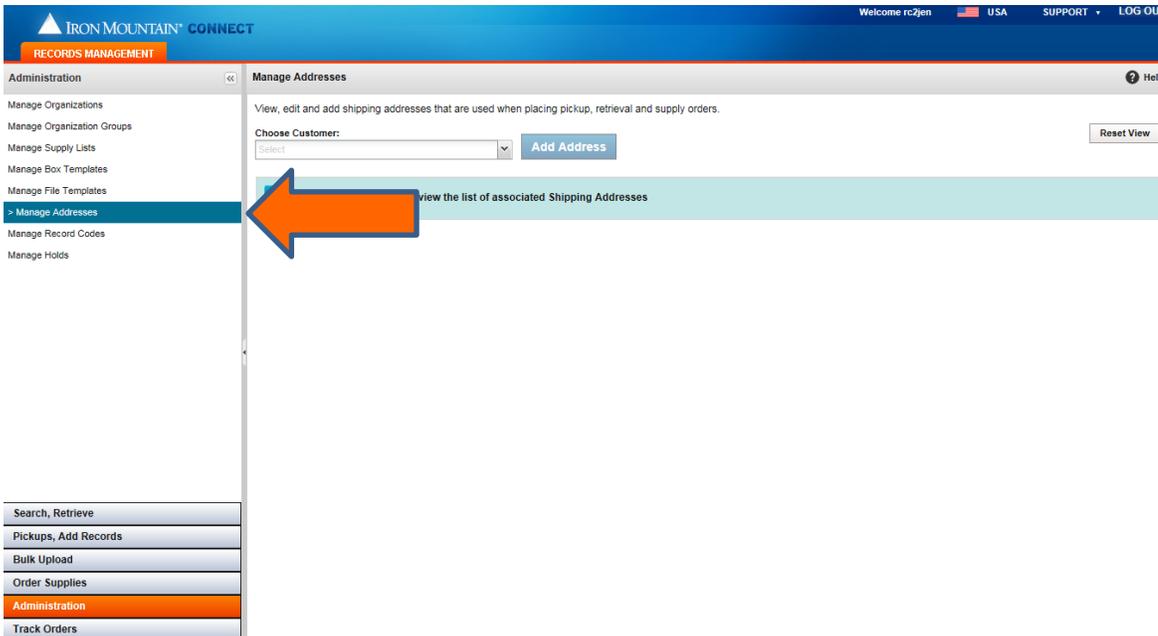
WHY WAS ADDRESS FUNCTIONALITY CHANGED?

- Multiple address repositories led to inconsistency and errors.
- One centralized repository means addresses are synchronized SYSTEM-WIDE.
- Default and favorite addresses automate processes and eliminate errors.
- Simpler workflow.
- Less time spent looking up and copying addresses to the personal address book.

SYSTEM ADMINISTRATOR SECTION

WHERE CAN I FIND THE NEW ADDRESS FUNCTIONALITY?

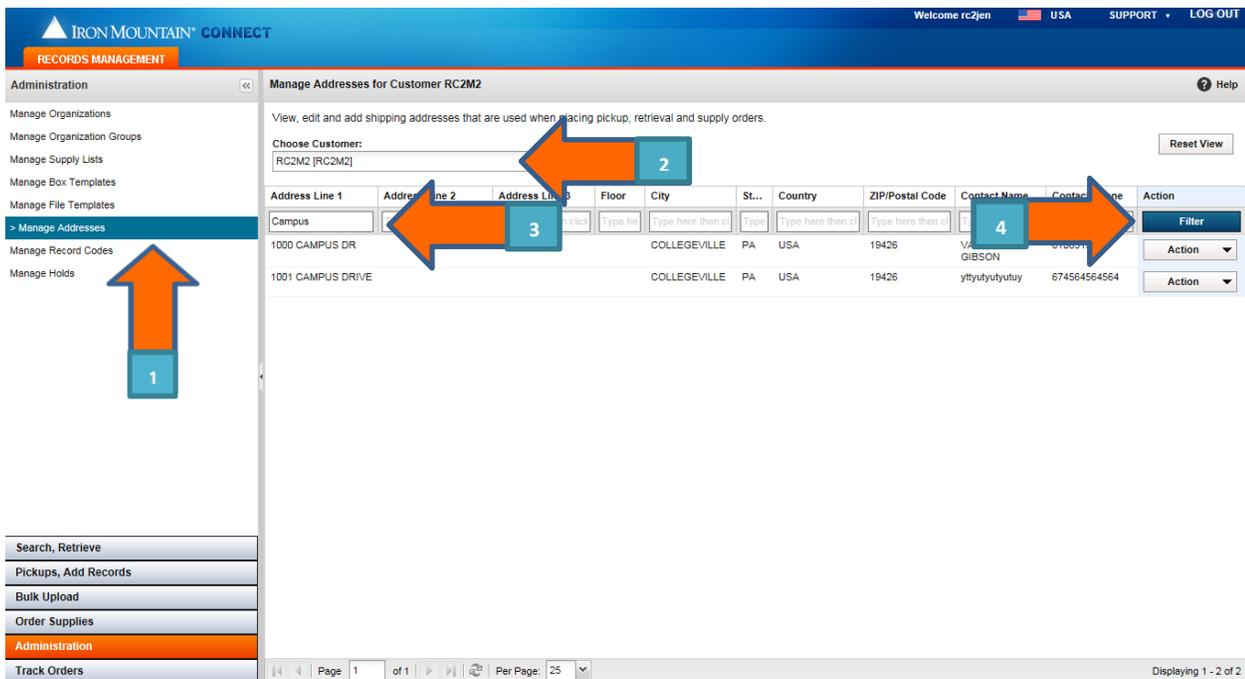
System administrators now create, edit, delete and enable user access to addresses from within **Administration | Manage Addresses**.



WHAT IF I CANNOT FIND AN ADDRESS?

If you cannot find an address that existed in a personal address book in Record Center, you have two options:

- **FILTER:** Apply column FILTERS to reduce the number of addresses displayed:
 1. Select **Records Management | Administration | Manage Addresses**.
 2. Select a customer.
 3. Enter a keyword from the address in one or more of the column filter fields.
 4. Click **Filter**. Addresses that match your criteria display.



IRON MOUNTAIN CONNECT | Welcome rc2jen | USA | SUPPORT | LOG OUT

RECORDS MANAGEMENT

Administration | Manage Addresses for Customer RC2M2

View, edit and add shipping addresses that are used when placing pickup, retrieval and supply orders.

Choose Customer: RC2M2 [RC2M2] [Reset View]

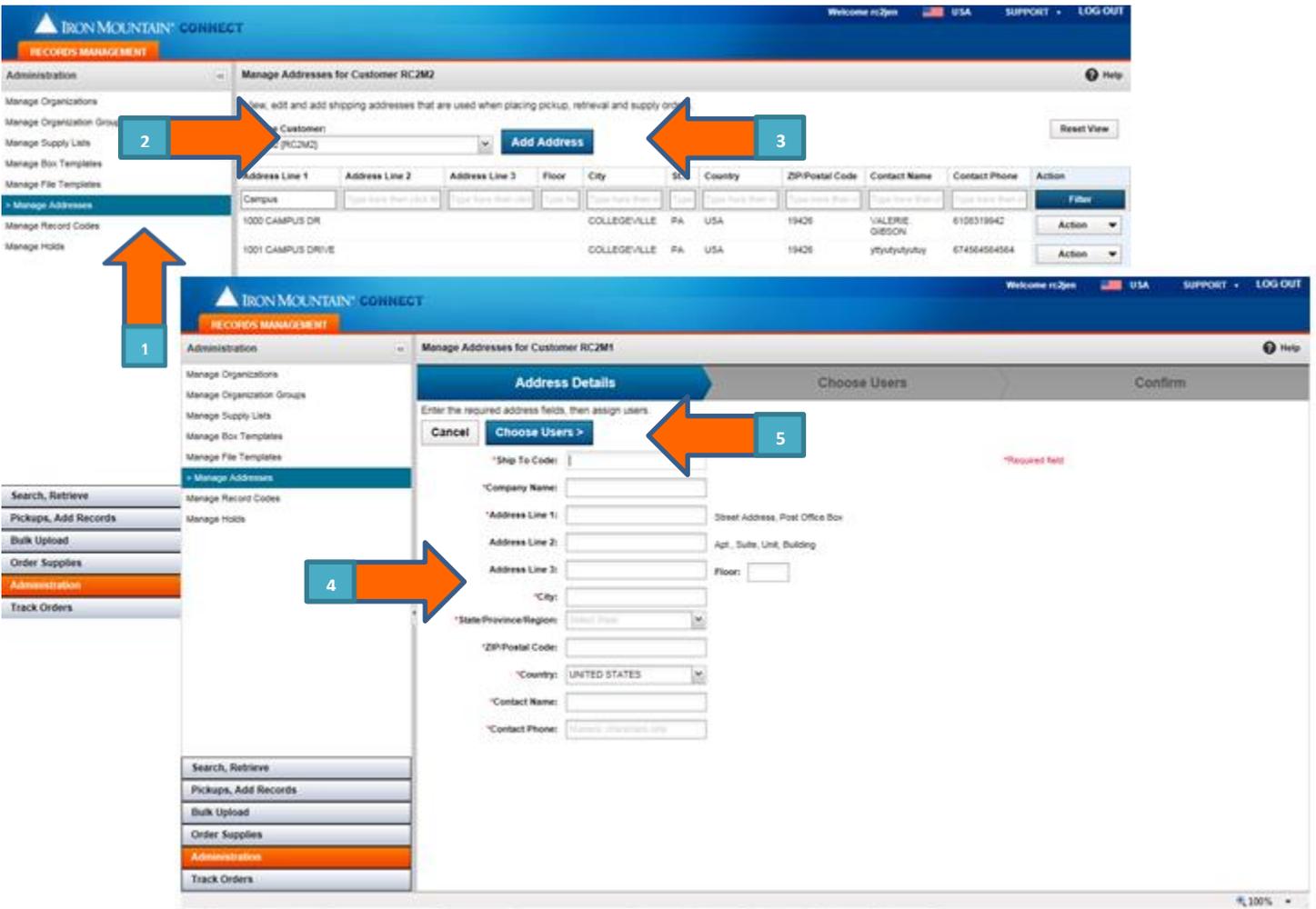
Address Line 1	Address Line 2	Address Line 3	Floor	City	St..	Country	ZIP/Postal Code	Contact Name	Contact Phone	Action
Campus										Filter
1000 CAMPUS DR				COLLEGEVILLE	PA	USA	19426	V. GIBSON		Action
1001 CAMPUS DRIVE				COLLEGEVILLE	PA	USA	19426	ytytyutyutyuty	674564564564	Action

Search, Retrieve | Pickups, Add Records | Bulk Upload | Order Supplies | **Administration** | Track Orders

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- **CREATE:** Create any addresses that your search does not find:
 1. Select **Records Management | Administration | Manage Addresses.**
 2. Select the Customer.
 3. Click **Add Address.** The shipping address wizard opens.
 4. Enter all required shipping address details.
 5. Click **Choose Users.**

NOTE: If a standard user needs access to the same address for different customers, system administrators use the steps above to manually create the address in each customer record.



6. Control which users will see and use this address when ordering:

- Allow user to see and use this address
- Restrict user from seeing and using this address

By default, all users are granted access to ALL new addresses unless the system administrator manually deselects the user during this step.

IRON MOUNTAIN CONNECT Welcome rc2jen USA SUPPORT LOG OUT

RECORDS MANAGEMENT

Administration Manage Addresses for Customer RC2M1 Help

Address Details Choose Users Confirm

Add or remove user access to this address, then click Confirm to review summary data and create this address. Reset View

< Address Details Cancel Confirm > 7

Assign All Users Unassign All Users

<input type="checkbox"/>	First Name	Last Name	Email	Username	Action
<input type="checkbox"/>	Type here then click filter	Type here then click filter	Type here then click filter	Type here then click filter	Filter
<input type="checkbox"/>	Limited	Access	talimited@imm.com	talimited	
<input checked="" type="checkbox"/>	Testim6	Adam15	testTZ11OCT6@imtn.com	testTZ1_25	
<input checked="" type="checkbox"/>	Testim6	Adam15	lkarthik16@imtn.com	lkarthik_25	
<input checked="" type="checkbox"/>	Testim6	Adam15	testTZOCT6@imtn.com	testTZ_6	
<input checked="" type="checkbox"/>	Testim6	Adam15	testTZ1OCT6@imtn.com	testTZ1_6	
<input type="checkbox"/>	IMC	Admin	autoAdvSearch3ff11@ironmountain.com	autoAdvSearch3ff11	
<input type="checkbox"/>	IMC	Admin	autoAdvSearch7ff11@ironmountain.com	autoAdvSearch7ff11	
<input type="checkbox"/>	IMC	Admin	holdcodeuser1ff11@ironmountain.com	holdcodeuser1ff11	
<input checked="" type="checkbox"/>	Ent	Admin	rc2syncpratap7@imm.com	rc2syncpratap7	
<input checked="" type="checkbox"/>	IMC	Admin	autoAdvSearch9ie9@ironmountain.com	autoAdvSearch9ie9	
<input type="checkbox"/>	IMC	Admin	autoRetrieval1ff11@ironmountain.com	autoRetrieval1ff11	
<input type="checkbox"/>	IMC	Admin	autoBoxEdit1ff11@ironmountain.com	autoBoxEdit1ff11	
<input checked="" type="checkbox"/>	autoAdvSearch5ie9	admin	autoAdvSearch5ie9@ironmountain.com	autoAdvSearch5ie9	
<input checked="" type="checkbox"/>	Annamalayar	Admin	Annamalayar@imm.com	Annamalayar	

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TIP: Use the **Assign All Users** or **Unassign All Users** link to update users in bulk.

7. Click **Confirm**, and then **Finish**.

NOTE: There may be a short delay before new addresses display on the Shipping Address List screen.

ADDRESS ACCESS INFO BY ROLE

Administrators:

Automatically have access to all addresses for the companies they are assigned to.

Standard Users:

- **New address:** Standard users are automatically granted access to new addresses. As a system administrator, you must manually deselect a user that should not have access to a new address.
- **Existing address:** Standard users do not automatically receive access to existing addresses. As a system administrator, you must review the addresses and manually grant user access to existing addresses.

Role Changes:

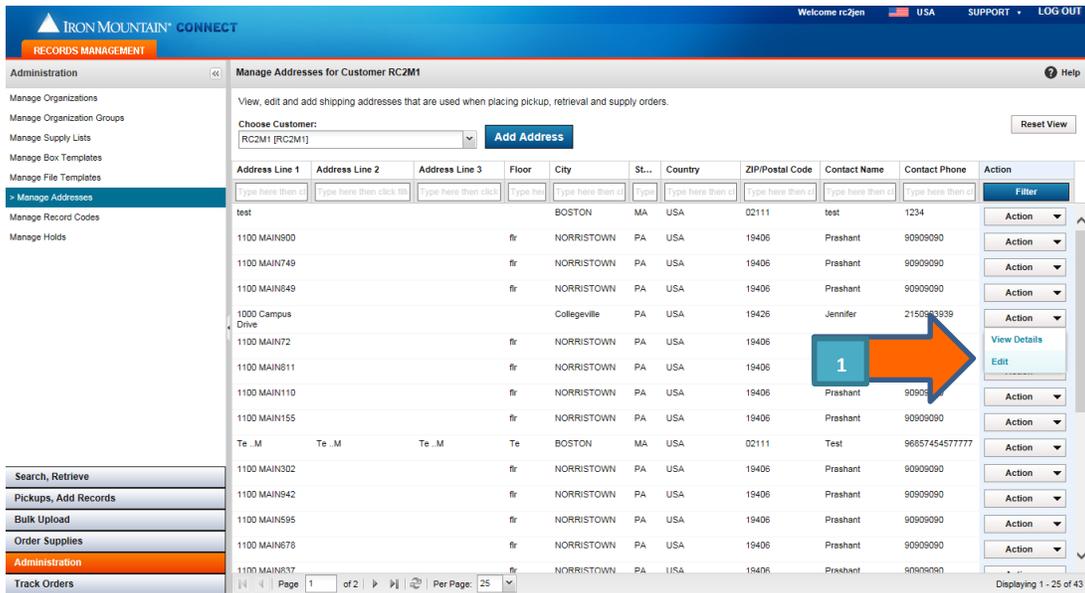
Administrators that have been converted to standard users lose all address access and must be manually granted access by their system administrator.

WHAT IF I SEE OUTDATED ADDRESSES?

As a system administrator, if outdated shipping addresses display, you have two options:

- **EDIT: Edit the address** and unassign all users associated with it. The address remains in Iron Mountain Connect Records Management; however, users no longer see the outdated address.

1. Select **Edit** from the **Action** dropdown to the right of the address.



Manage Addresses for Customer RC2M1

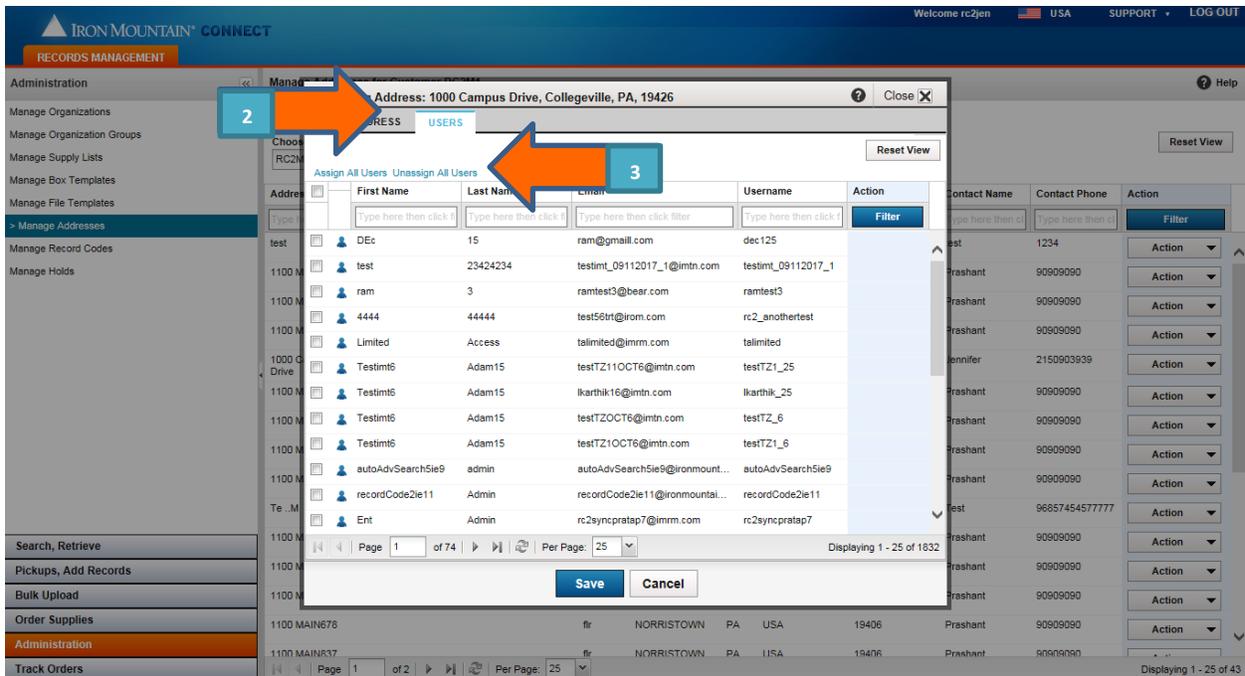
View, edit and add shipping addresses that are used when placing pickup, retrieval and supply orders.

Choose Customer: RC2M1 [RC2M1] [Add Address](#) [Reset View](#)

Address Line 1	Address Line 2	Address Line 3	Floor	City	St...	Country	ZIP/Postal Code	Contact Name	Contact Phone	Action
test				BOSTON	MA	USA	02111	test	1234	Action
1100 MAIN900			fir	NORRISTOWN	PA	USA	19406	Prashant	90909090	Action
1100 MAIN749			fir	NORRISTOWN	PA	USA	19406	Prashant	90909090	Action
1100 MAIN849			fir	NORRISTOWN	PA	USA	19406	Prashant	90909090	Action
1000 Campus Drive				Collegeville	PA	USA	19426	Jennifer	215093939	Action
1100 MAIN72			fir	NORRISTOWN	PA	USA	19406	Prashant	90909090	Action
1100 MAIN811			fir	NORRISTOWN	PA	USA	19406	Prashant	90909090	Action
1100 MAIN110			fir	NORRISTOWN	PA	USA	19406	Prashant	90909090	Action
1100 MAIN155			fir	NORRISTOWN	PA	USA	19406	Prashant	90909090	Action
Te .M	Te .M	Te .M	Te	BOSTON	MA	USA	02111	Test	9665745457777	Action
1100 MAIN302			fir	NORRISTOWN	PA	USA	19406	Prashant	90909090	Action
1100 MAIN942			fir	NORRISTOWN	PA	USA	19406	Prashant	90909090	Action
1100 MAIN595			fir	NORRISTOWN	PA	USA	19406	Prashant	90909090	Action
1100 MAIN678			fir	NORRISTOWN	PA	USA	19406	Prashant	90909090	Action
1100 MAIN837			fir	NORRISTOWN	PA	USA	19406	Prashant	90909090	Action

2. Click the Users tab.

3. Click the **Unassign All Users** link. Users will no longer see this address.



Address: 1000 Campus Drive, Collegeville, PA, 19426

Assign All Users Unassign All Users

First Name	Last Name	Email	Username	Action
DEc	15	ram@gmail.com	dec125	
test	23424234	testimt_09112017_1@imtn.com	testimt_09112017_1	
ram	3	ramtest3@bear.com	ramtest3	
4444	44444	test56trt@iron.com	rc2_anotherstest	
Limited	Access	talimited@immm.com	talimited	
Testim6	Adam15	testT211OCT6@imtn.com	testT21_25	
Testim6	Adam15	ikarthik16@imtn.com	ikarthik_25	
Testim6	Adam15	testT2OCT6@imtn.com	testT2_6	
Testim6	Adam15	testT21OCT6@imtn.com	testT21_6	
autoAdvSearch5ie9	admin	autoAdvSearch5ie9@ironmount...	autoAdvSearch5ie9	
recordCode2ie11	Admin	recordCode2ie11@ironmountal...	recordCode2ie11	
Ent	Admin	rc2syncpratp7@immm.com	rc2syncpratp7	

- **REMOVE: Remove the address.** Be aware that removing an address will permanently delete the address. No backup or audit records will be available. Only System Administrators can remove an address.
 1. Select **Records Management | Administration | Manage Addresses**. The Manage Addresses screen opens.
 2. Select **Remove** from the **Action** dropdown to the right of the shipping address you need to delete.
 3. Click **Remove** to confirm that you wish to remove the shipping address. The address is removed from Iron Mountain Connect Records Management.

Users who place phone orders rather than using Iron Mountain Connect Records Management may experience a temporary delay before the address is removed.

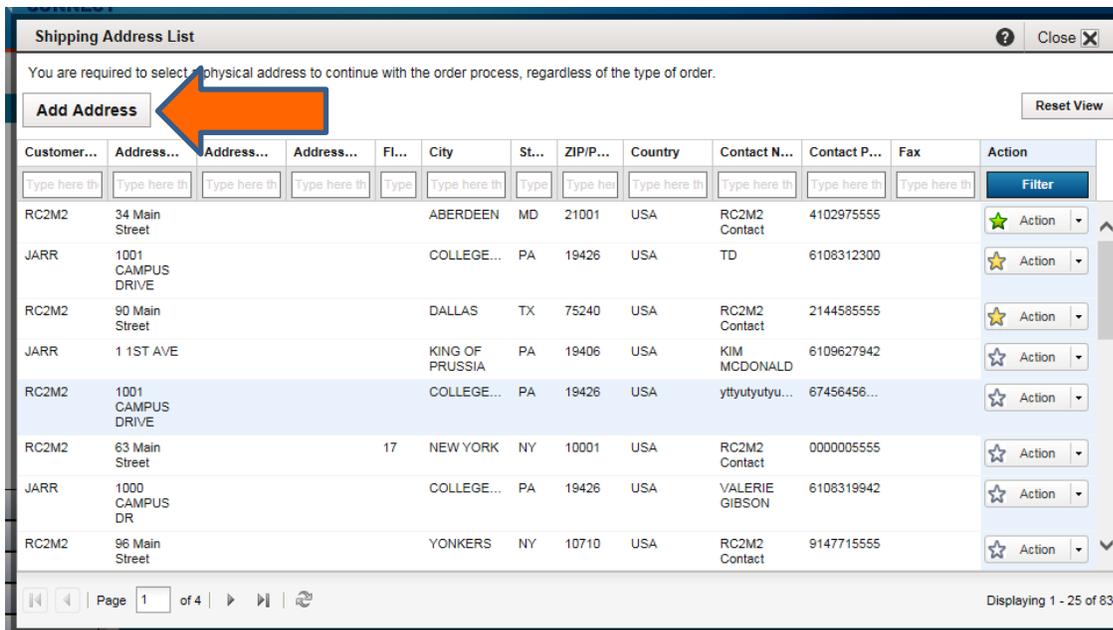
You CANNOT remove a shipping address if:

- It is the only address assigned to a user or to this customer
- It has been used on an order within the last 13 months
- It is associated with a recurring order
- It is associated with a shredding profile
- It is a department's default Ship To or Attention To address

CAN USERS CREATE ADDRESSES?

System administrators can enable users to create and edit addresses – and assign users to the addresses - on the fly while placing an order.

1. Check the **Create / edit shipping address** user permission on the System Permissions screen in Manage Users.
2. Users with this permission will see the Add Address button on the Shipping Address List screen. Users without this permission will not see this button.



Shipping Address List

You are required to select a physical address to continue with the order process, regardless of the type of order.

Add Address Reset View

Customer...	Address...	Address...	Address...	Fl...	City	St...	ZIP/P...	Country	Contact N...	Contact P...	Fax	Action
RC2M2	34 Main Street				ABERDEEN	MD	21001	USA	RC2M2 Contact	4102975555		★ Action
JARR	1001 CAMPUS DRIVE				COLLEGE...	PA	19426	USA	TD	6108312300		★ Action
RC2M2	90 Main Street				DALLAS	TX	75240	USA	RC2M2 Contact	2144585555		★ Action
JARR	1 1ST AVE				KING OF PRUSSIA	PA	19406	USA	KIM MCDONALD	6109627942		★ Action
RC2M2	1001 CAMPUS DRIVE				COLLEGE...	PA	19426	USA	ytytyutyu...	67456456...		★ Action
RC2M2	63 Main Street			17	NEW YORK	NY	10001	USA	RC2M2 Contact	0000005555		★ Action
JARR	1000 CAMPUS DR				COLLEGE...	PA	19426	USA	VALERIE GIBSON	6108319942		★ Action
RC2M2	96 Main Street				YONKERS	NY	10710	USA	RC2M2 Contact	9147715555		★ Action

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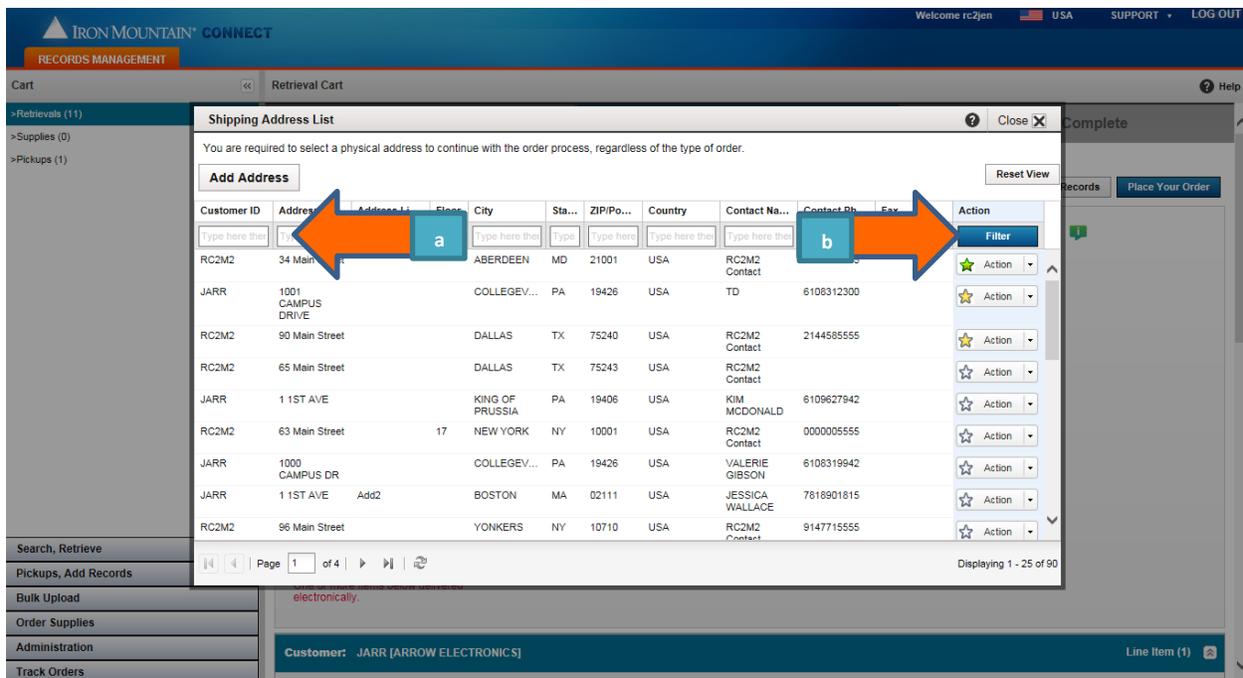
USER SECTION

WHERE CAN I FIND THE NEW ADDRESS FUNCTIONALITY?

Users review, select or enter an address from within the Details step in any order wizard.

First Time Users / Users Who Have Not Set a Default Address

1. If you have not set a Default address, the Shipping Address List screen opens every time you get to the Details step in the order process.
2. Select an address.
3. If you cannot find an address, apply column FILTERS to reduce the number of addresses displayed.
 - a. Enter a keyword from the address in one or more of the column filter fields.
 - b. Click **Filter**. Addresses that match your criteria display.



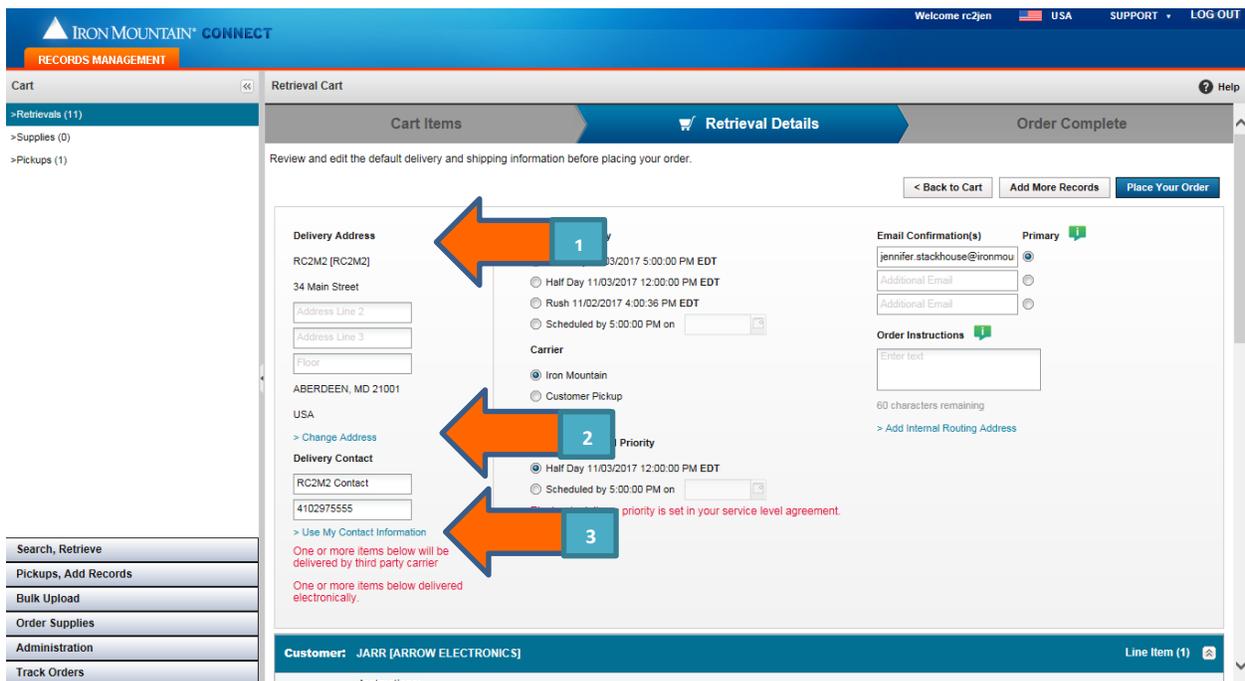
The screenshot displays the 'Shipping Address List' window in the Iron Mountain Connect system. The window title is 'Shipping Address List' and it includes a 'Close' button. Below the title bar, there is a message: 'You are required to select a physical address to continue with the order process, regardless of the type of order.' Below this message is an 'Add Address' button and a 'Reset View' button. The main content is a table with the following columns: Customer ID, Address, City, Sta..., ZIP/Po..., Country, Contact Na..., Contact Ph..., and Action. The table contains several rows of address data. Two orange arrows labeled 'a' and 'b' point to the filter input fields and the Filter button respectively. The table data is as follows:

Customer ID	Address	City	Sta...	ZIP/Po...	Country	Contact Na...	Contact Ph...	Action
RC2M2	34 Main Street	ABERDEEN	MD	21001	USA	RC2M2 Contact		Action
JARR	1001 CAMPUS DRIVE	COLLEGEV...	PA	19426	USA	TD	6108312300	Action
RC2M2	90 Main Street	DALLAS	TX	75240	USA	RC2M2 Contact	2144585555	Action
RC2M2	65 Main Street	DALLAS	TX	75243	USA	RC2M2 Contact		Action
JARR	1 1ST AVE	KING OF PRUSSIA	PA	19406	USA	KIM MCDONALD	6109627942	Action
RC2M2	63 Main Street	17 NEW YORK	NY	10001	USA	RC2M2 Contact	0000005555	Action
JARR	1000 CAMPUS DR	COLLEGEV...	PA	19426	USA	VALERIE GIBSON	6108319942	Action
JARR	1 1ST AVE Add2	BOSTON	MA	02111	USA	JESSICA WALLACE	7818901815	Action
RC2M2	96 Main Street	YONKERS	NY	10710	USA	RC2M2 Contact	9147715555	Action

At the bottom of the window, there is a 'Page 1 of 4' indicator and a 'Displaying 1 - 25 of 90' message. The background shows the 'Records Management' section of the Iron Mountain Connect interface.

Users Who Have Set a Default Address

1. If you have set a Default address, it displays on the Details screen. Enter additional information in the address fields if you have it.
2. To select a different address, click the **>Change Address** link, then select an address from the Shipping Address list screen.
3. To use contact information from your user profile, click the **>Use My Contact Information** link.



The screenshot displays the 'Retrieval Details' page in the Iron Mountain Connect system. The page is titled 'Retrieval Cart' and includes a navigation bar with 'Cart Items', 'Retrieval Details', and 'Order Complete'. The main content area is divided into several sections:

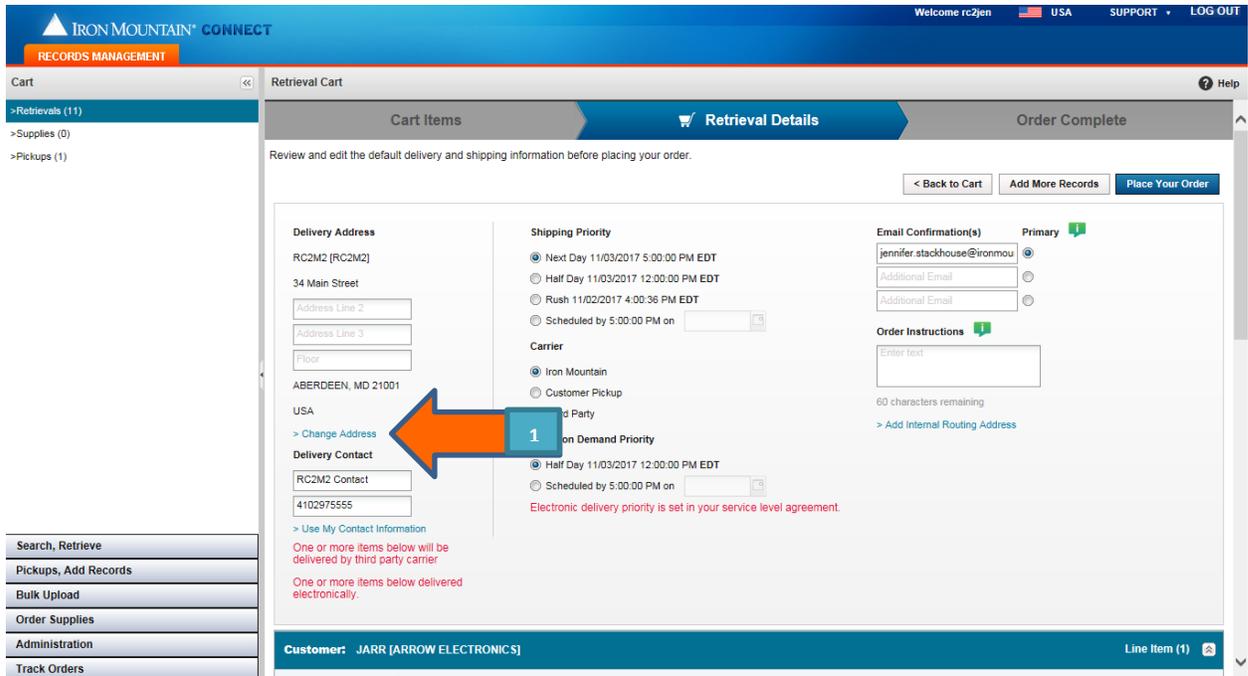
- Delivery Address:** Shows the current address (RC2M2 [RC2M2], 34 Main Street, ABERDEEN, MD 21001, USA) and a '> Change Address' link. An orange arrow labeled '1' points to this link.
- Delivery Contact:** Shows the current contact (RC2M2 Contact, 4102975555) and a '> Use My Contact Information' link. An orange arrow labeled '3' points to this link.
- Shipping Options:** Includes radio buttons for 'Half Day', 'Rush', and 'Scheduled by' with a time selector. A note states 'priority is set in your service level agreement.' An orange arrow labeled '2' points to the 'Change Address' link.
- Carrier:** Shows 'Iron Mountain' as the selected carrier and 'Customer Pickup' as an alternative.
- Email Confirmation(s):** Shows a primary email (jennifer.stackhouse@ironmou) and two additional email fields.
- Order Instructions:** Includes a text input field and a note '60 characters remaining'.

At the bottom of the page, the customer is identified as 'JARR [ARROW ELECTRONICS]' and the line item is 'Line Item (1)'.

Users Who Can Create Addresses

If your system administrator has enabled you to create and edit addresses, the **Add Address** button is on the Shipping Address List screen.

1. Click the **<Change Address** link from the Details step in the order wizard to open the Shipping Address List screen.



The screenshot displays the 'Retrieval Details' screen in the Iron Mountain Connect system. The page is titled 'Retrieval Cart' and shows a 'Retrieval Details' step. The main content area is a form for editing delivery and shipping information. A blue arrow points to the '> Change Address' link in the 'Delivery Address' section. The form includes fields for address, contact information, shipping priority, carrier, and email confirmation. The 'Delivery Address' section shows 'RC2M2 [RC2M2]' and '34 Main Street'. The 'Shipping Priority' section shows 'Next Day 11/03/2017 5:00:00 PM EDT' selected. The 'Carrier' section shows 'Iron Mountain' selected. The 'Email Confirmation(s)' section shows 'jennifer.stackhouse@ironmou' as the primary email. The 'Order Instructions' section shows 'Enter text' and '60 characters remaining'. The bottom of the screen shows 'Customer: JARR [ARROW ELECTRONICS]' and 'Line Item (1)'.

2. Click **Add Address**.

Shipping Address List Close X

You are required to select a physical address to continue with the order process, regardless of the type of order.

Add Address Reset View

Customer...	Address...	Address...	Address...	Fl...	City	St...	ZIP/P...	Country	Contact N...	Contact P...	Fax	Action
Type here th	Type here th	Type here th	Type here th	Type	Type here th	Type	Type he	Type here th	Type here th	Type here th	Type here th	Filter
RC2M2	34 Main Street				ABERDEEN	MD	21001	USA	RC2M2 Contact	4102975555		★ Action
JARR	1001 CAMPUS DRIVE				COLLEGE...	PA	19426	USA	TD	6108312300		★ Action
RC2M2	90 Main Street				DALLAS	TX	75240	USA	RC2M2 Contact	2144585555		★ Action
JARR	1 1ST AVE				KING OF PRUSSIA	PA	19406	USA	KIM MCDONALD	6109627942		★ Action
RC2M2	1001 CAMPUS DRIVE				COLLEGE...	PA	19426	USA	ytytyutyu...	67456456...		★ Action
RC2M2	63 Main Street	17			NEW YORK	NY	10001	USA	RC2M2 Contact	0000005555		★ Action
JARR	1000 CAMPUS DR				COLLEGE...	PA	19426	USA	VALERIE GIBSON	6108319942		★ Action
RC2M2	96 Main Street				YONKERS	NY	10710	USA	RC2M2 Contact	9147715555		★ Action

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3. Enter all required shipping address details.

Add Shipping Address Close X

Address Details Choose Users Confirm

Enter the required address fields, then assign users.

3 Choose Users **4**

*Choose Customer: RC2M2 (RC2M2) *Required field

*Ship To Code: NST

*Company Name: JayCo

*Address Line 1: 1000 Campus Drive Street Address, Post Office Box

Address Line 2: Apt., Suite, Unit, Building

Address Line 3: Floor: 4

*City: Collegeville

*State/Province/Region: PENNSYLVANIA

*ZIP/Postal Code: 19426

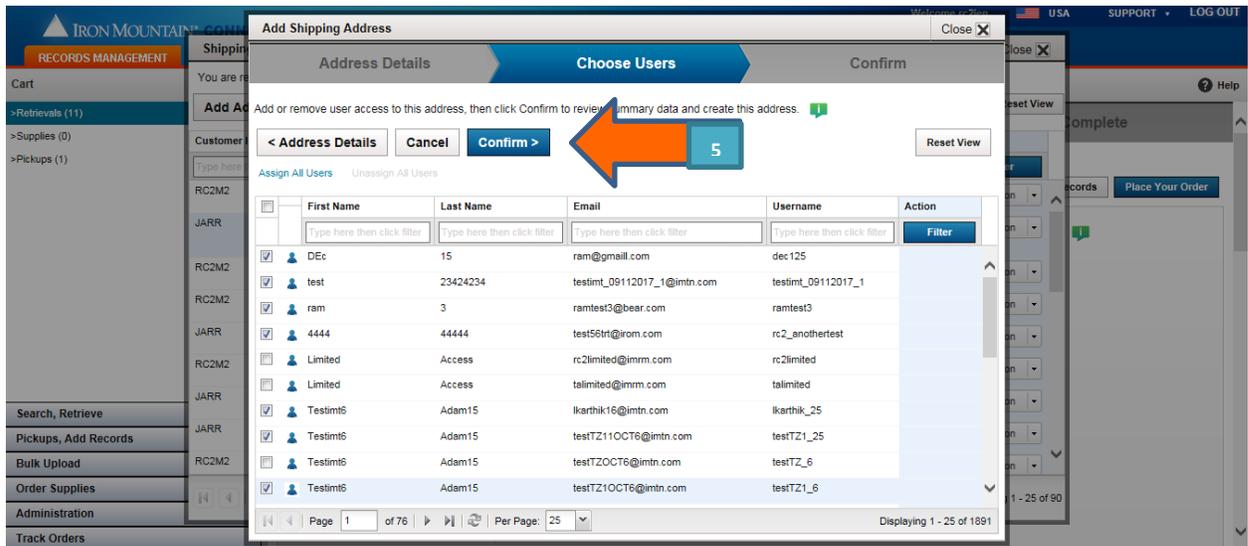
*Country: UNITED STATES

*Contact Name: Jennifer Smythe

*Contact Phone: 2153909966

4. Click **Choose Users**. Control which users will see and use this address when ordering:

- Allow user to see and use this address
- Restrict user from seeing and using this address



TIP: Use the **Assign All Users** or **Unassign All Users** link to update users in bulk.

By default, all users are granted access to ALL new addresses unless you manually deselect the user during this step.

5. Click **Confirm**, and then **Use This Address**.

NOTE: There may be a short delay before new addresses display on the Shipping Address List screen.

HOW DO I SET DEFAULT AND FAVORITE ADDRESSES?

Users set Default and Favorite Addresses from the Shipping Address List screen.

The Shipping Address List screen opens automatically each time a user places an order UNTIL a Default address is set.

Customer...	Address...	Address...	Address...	Fl...	City	St...	ZIP/P...	Country	Contact N...	Contact P...	Fax	Action
Type here th	Type here th	Type here th	Type here th	Type	Type here th	Type	Type he	Type here th	Type here th	Type here th	Type here th	Filter
RC2M2	34 Main Street				ABERDEEN	MD	21001	USA	RC2M2 Contact			★ Action
JARR	1001 CAMPUS DRIVE				COLLEGE...	PA	19426	USA	TD	6108312300		★ Action
RC2M2	90 Main Street				DALLAS	TX	75240	USA	RC2M2 Contact			★ Action
JARR	1 1ST AVE				KING OF PRUSSIA	PA	19406	USA	KIM MCDONALD	6109627942		★ Action
RC2M2	1001 CAMPUS DRIVE				COLLEGE...	PA	19426	USA	ytytytytyu...	67456456...		★ Action
RC2M2	63 Main Street		17		NEW YORK	NY	10001	USA	RC2M2 Contact	0000005555		★ Action
JARR	1000 CAMPUS DR				COLLEGE...	PA	19426	USA	VALERIE GIBSON	6108319942		★ Action
RC2M2	96 Main Street				YONKERS	NY	10710	USA	RC2M2 Contact	9147715555		★ Action

1. Default Address:

- Marked with green star ★
- One default address
- Automatically populates the address fields in the Detail step when placing an order
- Displays at top of Shipping Address screen

2. Favorite Address:

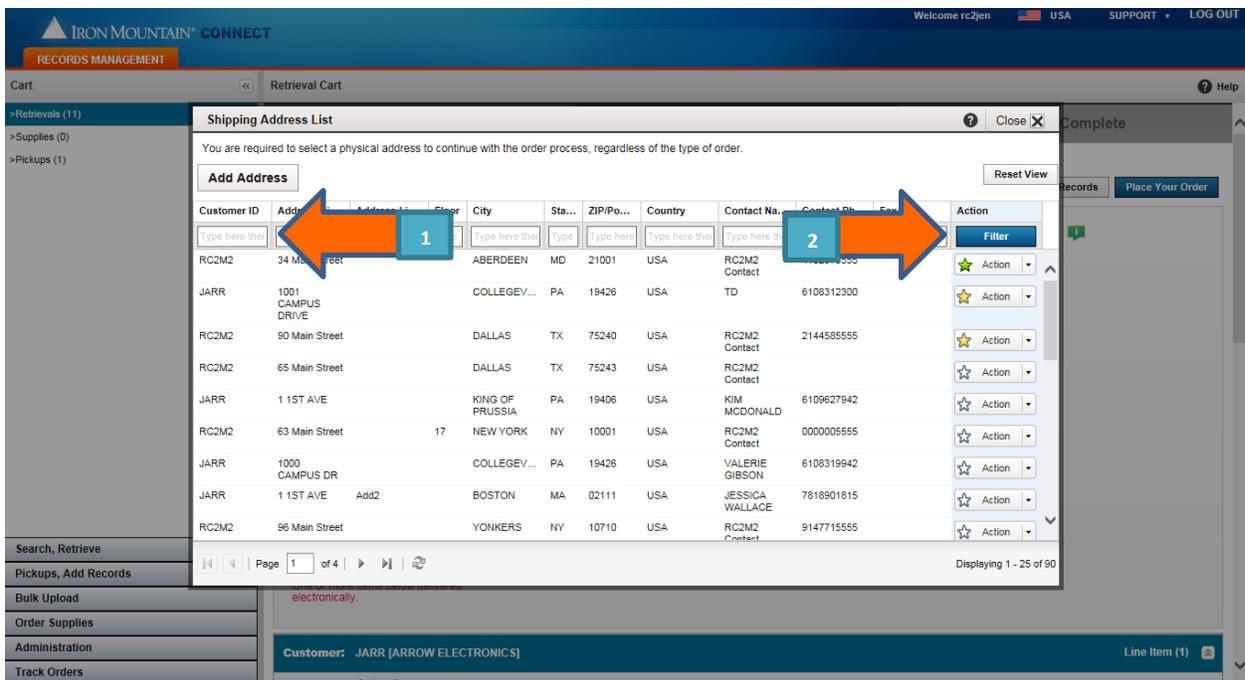
- Marked with gold star ★
- Multiple favorite addresses
- Displays at the top of the Shipping Address screen, or directly below the default address if a default address has been set

- Used to organize the address list; quickly find favorite addresses near the top of the address list

WHAT IF I CANNOT FIND AN ADDRESS?

If you cannot find an address, apply column FILTERS to reduce the number of addresses displayed.

1. Enter a keyword from the address in one or more of the column filter fields.
2. Click **Filter**. Addresses that match your criteria display.



The screenshot displays the 'Shipping Address List' window in the Iron Mountain Connect system. The window title is 'Shipping Address List' and it includes a 'Close' button. Below the title bar, there is a message: 'You are required to select a physical address to continue with the order process, regardless of the type of order.' Below this message is an 'Add Address' button and a 'Reset View' button. The main area is a table with the following columns: Customer ID, Address, City, Sta..., ZIP/Po..., Country, Contact Na..., and Contact ID. The table contains 10 rows of address data. Two orange arrows are overlaid on the image: arrow 1 points to the 'Address' filter input field, and arrow 2 points to the 'Filter' button. The bottom of the window shows a 'Page 1 of 4' indicator and a 'Displaying 1 - 25 of 90' message. The background shows the 'Records Management' sidebar and the 'Retrieval Cart' header.

Customer ID	Address	City	Sta...	ZIP/Po...	Country	Contact Na...	Contact ID
RC2M2	34 Main Street	ABERDEEN	MD	21001	USA	RC2M2 Contact	6108312300
JARR	1001 CAMPUS DRIVE	COLLEGEV...	PA	19426	USA	TD	6108312300
RC2M2	90 Main Street	DALLAS	TX	75240	USA	RC2M2 Contact	2144585555
RC2M2	65 Main Street	DALLAS	TX	75243	USA	RC2M2 Contact	
JARR	1 1ST AVE	KING OF PRUSSIA	PA	19406	USA	KIM MCDONALD	6109627942
RC2M2	63 Main Street	17 NEW YORK	NY	10001	USA	RC2M2 Contact	0000005555
JARR	1000 CAMPUS DR	COLLEGEV...	PA	19426	USA	VALERIE GIBSON	6108319942
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