



Customer Handbook

Company & Department Codes

Company Code

Department Code

How to place a retrieval order via fax:

Fax order to 615-781-0637 with the following information:

Company Code & Department Code(s)

Your first and last name and phone number

Delivery type – half or next (all stats must be phoned in)

Items you are requesting – carton number(s). These numbers are Security Archives, Inc.'s carton numbers and not the temporary numbers assigned by you in the beginning. If you do not know or cannot find the Security Archives, Inc. number, please send all available information for the carton you will need. A representative of Security Archives, Inc. will contact you if there is any difficulty in locating it.

How to place a pick-up order via fax:

Fax order to 615-781-0637 with the following information:

Company Code & Department Code(s)

Your first and last name and phone number

Pick-up type – number of re-files or new storage and number of cartons or files per Department

Size of cartons per Department

Carton sales orders via fax:

Fax order to 615-781-0637 with the following information:

Company code & Department code(s)

Your first and last name and phone number

Number of cartons requested per Department

Size of cartons requested (only sell 01's and 02's) per Department

All orders are placed with Customer Service.

Security Archives, Inc. requests that **ALL** orders are placed through Customer Service department or via our Web Application. Normal (Nextday and Halfday) orders may be ordered via phone, Web Application or fax. Please understand that fax machines are prone to error. If you place an order via fax, please call to let someone know that it is coming or should have arrived. Whenever using a fax to place an order please type or print your request. Also print or type your first and last name as well as signing your request. Using this method will insure that your order is received and placed in a timely manner.

Security Archives, Inc. does not accept faxed or e-mailed STAT requests. If you feel you need to fax a request, please call Customer Service first and let them know that your STAT information is on its way. The time for the stat begins when we have all information necessary to process the order as well as confirmation from you, the person placing the order. That means we have received the information and we have had verbal communication with you confirming that the order is to be delivered STAT. The person ordering must sign all STAT faxes.

Any change made to an order means the time for that order begins anew with each change. For example: You call on Tuesday morning before 11:30 to request a terminated employee file for Bob Jones terminated in 1998 for a Nextday delivery. When we call on Wednesday morning to let you know it was a no match, you request that we look in 1999. The original delivery time is changed from Wednesday morning to Thursday morning.

While we at Security Archives, Inc. appreciate the bond you may form with our Customer Care Representative, Sales or our Chief Operating Officer, all orders should be placed through customer service to guarantee your delivery in a timely manner. Other personnel are often away from their desks and this delays order processing and although they may know and understand certain aspects of our business, our customer service representatives are trained to deal with your request in ways they may not be. Keeping that in mind, we request that all* orders come through our Customer Service Department or the Web Application. Of course, from time to time, you may need to place an order that is unusual and Customer Service will be happy to forward the order information to the appropriate party.

You may place an order with the driver delivering to you under certain circumstances. If you are placing an order for an item, it must come from the department you've had an item delivered to you at that time. You must write the item on the work order and sign it. If you do not know the specific item number or carton number, you must call customer service. Please understand that if you choose this method of ordering the turnaround time is 48 hours or two business days from the time the driver's paperwork is processed when he returns to the office rather than 24 hours. You may not request Stat or Halfday deliveries from your driver.

*The exceptions to orders coming through Customer Service are destruction orders and orders placed with the driver. The preferred method of sending a destruction order is via email to the COO at dstacey@securityarchives.com. It is best if they are in Excel or Crystal format.

Common Standard Office Cartons sizes:

Security Archives, Inc. types (Purchased at office supply stores)	Dimensions
AN01	10"x12"x15"
AN02	10"x12"x24"
03	10"x15"x24"
04	14"x13"x14"
19	11 1/2"x14"x25" drawer
26	5"x8"x12" check box
29	5"x12"x24" check box
34	11 1/2"x17"x25" drawer
Security Archives Supplied Cartons	
SA01	Letter/Legal Carton
SA02	Letter Long Carton

Security Archives, Inc. will accept any carton for delivery; however we may find it necessary to re-box your carton into a **standard office carton**. Most cartons you purchase from a public vendor such as Office Max are acceptable to us. A few of their cartons, for example any carton that attaches to another with metal or any other material, are not usable in our warehouse environment without special arrangement having been made. Cartons that are made for shipping are not standard office cartons. The carton cannot require the use of tape to keep it closed. The carton must be lidded or use the flap closure with the button and rope. Of course, anytime we re-box a carton you do incur charges, both the price of the box and our re-boxing fee. If you are uncertain if your carton meets the requirement, you may call your customer service or Sales.

When new cartons are sent to Security Archives, Inc. you will incur a fee for Receiving & Indexing. This is the cost to give the carton a bar code address (assigning it a location in the warehouse) as well as entering the carton and its description into our database. Transmittal sheets are provided free of charge so that you may keep track of the description you want entered. You may obtain the Transmittals Sheets from our website (www.securityarchives.com) under **FORMS**. When new storage is picked up you should supply the original (white) page of the transmittal sheet to the driver to attach to the work order. Cartons that come in without transmittal incur a man-hour charge for us to write the description for customer service to enter into the computer. The cost for Receiving and Indexing is by Cubic Foot with a one cube minimum. If you send four (4) standard one point one (1.1) cubic foot cartons and four (4) other point nine (.9) cubic foot cartons, you will incur charges for eight point four (8.4) cubic feet of Receiving & Indexing.

How to pack a carton:

First choose a quality standard office carton. We suggest two hundred pound (200#) test. Cartons wear out quickly so it is important that you choose a quality box to reduce the re-boxing and carton replacement fees.

Leave one and a half to two (1 ½"-2") inches in back of carton.

Input items in an alpha or numeric range or a range that makes sense to your company.

Keep like items together in same carton.

Items in the carton should face the same direction, and be right side up. Multiple items of the same should be kept together when possible. When we search for a file in an un-indexed carton, we will stop when we locate the first file. If you have multiple files for *Jim Jones*, please let us know when ordering that *Jim Jones* has four files for our retrieval from that carton. Also let us know if the file requested is a red well folder holding multiple files.

If we file index and the files are not upright facing the front of the carton we will correct this. Doing so may incur additional carton packing fees and more cartons added to your storage.

Do not mix destruction eligibility dates in same carton.

How to label a carton:

Put the year first always – this helps you in your search efforts.

Alpha or numeric range

Type of contents (e.g. A/R, HR, etc.)

Always put a destruct date on the carton. The carton will not be destroyed until someone from your company & department on the list requests a destruction eligibility report and/or provides a list of items and then signs off on the destruction. If the carton is never to be destroyed note that as well, in our data base we will show the destruction date as 12/31/9999 as well as checking the Do Not Destroy box in our system.

Do not use miscellaneous or “Bob’s” desk – years from now you will have no idea what is in this carton.

Write on the carton in the space provided that says description. Keep in mind that Carton descriptions are only eighty (80) characters. We at Security Archives, Inc. as a general rule do not adjust your description to fit. The description begins with your first word and ends when we finish inputting your description or we run out of space, whichever comes first.

Always leave room on the face of the carton for Security Archives, Inc. to apply the barcode label. Our barcode is approximately 2” x 4”.

Under no circumstances should you put your description on the lid or side. The lid is not a permanent part of the carton and can be lost.

Filling out your transmittal sheets:

Enter your customer code and department code on transmittal in the space provided.

Start with year in description – type – alpha/numeric range and date range if any or misc. info. Each carton is only allotted eighty (80) characters. The shaded or white area (containing two (2) lines of data) is one carton description. There is space for 10 carton description on each transmittal sheet.

Enter your destruction date in the appropriate box. If the destroy date is never – put NEVER. It will show on your report as 12/31/9999.

There are areas on the transmittal sheets that are designated for Security Archives, Inc. use only. Please leave those spaces blank unless you've cleared it with us to use them. In most cases Security Archives, Inc. numbers your cartons. In the few cases that you the client number them, we would expect you to use the larger of the reserved spaces for the carton number. Please realize that just because you number the cartons one through ten does not mean that is the number used in our data base to track your carton. In many cases those numbers are a guide for your purposes and are used multiple times in your database. Space permitting, we will include your *box* number in the description of your carton.

If you have multiple departments in your facility that are kept in separate databases at Security Archives, Inc. we require that you find a way to designate cartons in different departments. We at Security Archives, Inc. can not assure that the cartons are received into the correct department if cartons are not labeled clearly. All cartons are placed together on the truck or van and need to be labeled in such a way as is easily identified when unloaded at our facility.

Reports:

Carton list report:

Lists vary by size. Reports are in email. We format all reports in description order unless requested otherwise. If your report is too large to email we will save it to a CD with a \$5.00 fee. A STAT request of this report will come at the STAT rate listed on your pricing profile.

This report is free to our online Web Application clients when they view, save or print.

Destruction eligibility report:

Customer requests report by date range either for monthly, quarterly and annual destruction. In some cases, a client may request in advance that a destruction eligibility report be sent (for example: Twice a year in January and July).

Security Archives, Inc. will send report and request that you sign off on the report and send back to Security Archives, Inc. We will ***not*** destroy without written authorization unless items fall under contract default by the customer. Just because your cartons says to destroy in 2009, that does not mean we automatically destroy those cartons. The law may have changed, or your corporate requirements may have changed. All requests must be made in writing by an authorized agent of your company.

All requests for destruction must be submitted a minimum of fifteen working days prior to the last working day of the month to be completed during that month. The request cannot be more than 500 cartons. Any requests outside of that time allotment or size could fall into the following month's destruction schedule resulting in another month of storage fees for you the customer.

Other fees:

Carton sales incur a delivery charge unless delivered with a retrieval or pick-up order. The delivery charge will be the Nextday trip charge (our least expensive fee) unless the request is made that the cartons be delivered on that day. In that case, the charge will be the Stat trip charge.

Stat pick-up fees are used when a pick-up must be done at a certain time or less than our forty-eight (48) hour schedule time. All regular pick-ups are done within forty-eight (48) hours at our discretion. Scheduled pick-ups more than forty-eight (48) hours in advance are scheduled with the Warehouse/ Fleet Supervisor at our normal delivery rates. A half day window is required in most cases. If you require a stat pick up and the call is made after 11:30, an after-hours stat pick-up will be charged.

Wait fees are incurred when we must wait at your site for someone to sign for a delivery or pick-up, or wait while you finish preparing an item, etc. Wait fees, also known as labor charges are also incurred when you request verbal information from a file or you must have information from a file faxed to you and must explain to us what that might be. Please remember that we do not necessarily know the specifics of your industry or what your specific forms might be called or what they look like.

Research fees are incurred when you request an item that we don't have or an item that is already out to you or someone else in your company.

When you call just to request information on a carton and/or file when either must be pulled from its warehouse location to provide you with that information you incur the usual retrieval and refile charges as well as labor charges. If the information is required immediately, stat charges will apply.

Hours of Operation:

Security Archives, Inc.'s regular hours of operation are from 8 am to 4:30 pm Monday through Friday. We reserve 8 days a year as Holidays and our Holiday list is provided at the beginning of each calendar year to our clients.

Delivery fees:

A Nextday delivery is ordered between 8am and 11:30am for the next business day's morning run for delivery by 1pm. If ordered between 11:30am and 4:30pm for the next business day's afternoon run for delivery by 5pm. If your business closes before our designated available delivery times, we can not guarantee that it will be delivered on that day unless you request a morning delivery or a stat delivery.

A Halfday delivery is ordered between 11:30am and 4:30pm for the next morning's delivery by 1pm. If ordered between 8am and 11:30am for the afternoon run by 5pm. Again if your business closes before our 5pm delivery cut off, we can not guarantee delivery on that day.

Stat** delivery is when an item is required at a certain time, within 2 hours in the greater metro Nashville area during normal business hours (2 hours inclusive of normal business hours), or same day (with varying parameters by client) outside greater metro Nashville (includes TN delivery only.)

After-hour stat** delivery is anything ordered after 2:30 pm (within greater metro Nashville) for same day delivery or delivery before 10am the following business day or delivery outside normal business hours. After-hour stats include items that are pulled for fax only, pick-up and/or delivery outside the normal scope of business. For after-hour stats we do not remove the delivery fee for pick-up or fax orders. Security Archives, Inc. must pay someone overtime and/or bring them in at unusual hours for your convenience, therefore the fee is set and non-negotiable. If you require access to our facility outside our normal business hours we will also add an hourly labor rate to the After-hour stat delivery fees.

Holiday Stats are anything ordered on official or designated Security Archives, Inc. holidays. Once again the fees are set and non-negotiable. Security Archives, Inc. must pull an employee away from his family on the holiday and pay them the usual fee as well as a premium for the holiday.

*****Stat and After-hour Stat requests can only be done in the time span mentioned previously if the order is a maximum 20 files and/or cartons.***

Tape Rotation Clients

Tape Rotations are done regularly in a pre-determined half day time frame. For instance, if your selected time frame is Tuesday afternoon, we will do the rotation every Tuesday between 1pm and 5pm. If your business closes prior to 5pm other rotation time may need to be considered or we will charge a larger fee for the service. All tapes and or cases must be labeled with an alpha-numeric character to exceed no more than 8 characters and must be unique. No other tape or case in a single department may have the same exact character identifier. Any tapes or cases repeating the same unique character identifier will be returned to the client to be changed. All tapes are ordered by that character and not by the description.

It is the client's responsibility to inform Security Archives, Inc. if they are closed on a holiday and would like the rotation moved to another day. With at least 24 hours notice, there will be no extra charge to move the rotation. If the rotation is moved after the 24 hour time period and before the end of business the previous day for a morning rotation or by 11:30 on the same day for an afternoon rotation, there will be a half day trip fee charged. If it is after the limits outlined above, it will be a stat charge or if after 2:30 on the same day, an after-hours stat charge. Once a year with price adjustment letters, Security Archives, Inc. encloses our Holiday Schedule. Please note that any rotation deliveries on Security Archives, Inc. scheduled Holidays are paid at the Holiday rate above the quoted Tape Rotation Charge.