



# CLIENT HANDBOOK




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## 1. PREPARING BOXES FOR STORAGE

### 1.1 GENERAL INFORMATION

- **Box bar-code label** to be placed on printed end of box in the designated area.
- The use of **good quality archive boxes** is imperative. Workplace Health & Safety do not allow us to store inferior boxes where the bottom falls out. Our high quality archive boxes come in packs of 25 and cost \$4.95 each + gst.
- **Do not over pack the box.** The box should be between 75-90% full. The lid must fit flat on top of the box with no humps and should not weigh more than 14kgs. **Over packed boxes will be re-boxed.**
- Boxes should be packed with the same type of records and if possible by destruction or review date.
- You must know the contents of each box.

This is where the box barcode will be placed.

| BOX CONTENTS     | BARCODE LABEL  |                  |
|------------------|--|------------------|
|                  |  <p>TOTAL<br/>RECORD<br/>MANAGEMENT<br/>Brisbane<br/>DEM-00180</p>                    |                  |
|                  | <table border="1"><thead><tr><th data-bbox="965 1541 1345 1603">DESTRUCTION DATE</th></tr></thead><tbody><tr><td data-bbox="965 1603 1345 1832"></td></tr></tbody></table> | DESTRUCTION DATE |
| DESTRUCTION DATE |  |                  |
|                  |  |                  |

This is where to write a brief description of the box contents & dates.

## 1.2 BOX IDENTIFICATION

You can use the **Box Bar-Code Label** as your numbering system, which ensures that both parties refer to the same number.

If you use your own box numbering system, you can cross-reference it against the Box Bar-Code eg.

| <b>Your Number</b> | <b>Box Bar Code</b> |
|--------------------|---------------------|
| Pro/96             | DEM-00180           |
| 459/1              | DEM-00181           |
| Accts Box 6        | DEM-00182           |

Each Box Bar-Code is unique and can never be duplicated in our system, this ensures that there will be no double ups of box numbers.

Your box number will be entered into TRM's database at a small charge if you do not have it recorded in your own system.

## 1.3 CATALOGUING

You can give the box a brief description on the printed end of the box in Box Contents area. You can use a date or sequence number either *'from & to'* or *'start & finish'*, which we will catalogue and charge accordingly.

If nothing is recorded on the outside of the box we will always assume that you know the contents.

If the box numbering or Box Barcode Label does not suit you application, and you are unsure of the contents of some or all your boxes, we do provide a cataloguing service which varies in price according to the detail required. We also offer a **File Inventory Service**, which consists of listing all files within a box.

You can speak to a customer service representative and arrange for any of the above services, preferably before the boxes are sent into storage. We also offer free consultancy on how to pack and record your box information.

## **2. RETRIEVAL, REFILING & LODGING OF BOXES & FILES**

### **2.1 GENERAL INFORMATION**

- For all requests  
**Phone 4032 2699 Fax 4032 2899**  
**Email cairns@totalrecords.com.au**
- Only persons on the Authorised Signature Access List can order boxes or files.
- We have 2 regular delivery runs a day. Orders received *after 2 pm and before 9 am* generally will make it on the **morning run**. Orders received *after 9 and before 2* will be on the **afternoon run**.
- Urgent Requests received up to 4.00 pm will be delivered within 1 hour.

### **2.2 RETREIVAL OF A BOX OR FILE FROM TRM**

You **place an order either by fax, email or over the Web**.

To order a BOX – simply request by Box Barcode Number, your box number, and description of box contents if you don't know the number.

To order a FILE – supply File No, File Name, Description and if your files are not inventoried supply the Box Number or Box Contents Description that the file will be found under.

### **2.3 REFILE / RETURN A BOX OR FILE TO TRM**

You can **phone, fax or email** that you have boxes or files to send back to us and we will organise our driver to pick up. It is a good idea to let us know the numbers especially boxes, so we have enough room in the van to complete the pickup.

You can also **INTERFILE** – which is archiving documents or files into boxes that are already in off-site. These items are not barcoded – but are registered in the system so we can advise you of what has been sent into TRM and we log what box it was returned to.

## **2.4 LODGING NEW BOXES**

You can request a pickup of new cartons from your office by fax, email or over the Web (if you have Web Access). You simply advise the approximate number of boxes for pickup, when they will be ready and pickup address.

A catalogue sheet can accompany the boxes (handed over with the new lodgement) or it can be sent via fax or email prior to the pickup.

If you are using Web Access these boxes will be added and catalogued in the PRE-ADD status – once the boxes arrive in the warehouse and scanned their status will change to IN.

## **3. OTHER SERVICES**

### **3.1 ORDERING ARCHIVE BOXES AND BARCODES**

Once again by phone, fax or email just let us know the quantity of boxes, they come in packs of 25.

Barcode labels are ordered over the phone or by fax with your ORDERS.

### **3.2 REBOX AND REPACK**

The contents of a box will be reboxed under the following circumstances, at our discretion:

1. **If the box is damaged** i.e. handles torn or damaged, no top, sides split, boxes taped to hold it together,
2. **If the box is overpacked** (boxes should be packed to no more than 85%)

A fee of \$6.95 will apply (\$2.00 repack; \$4.95 new box).

### **3.3 PERMANENT OUT**

This occurs when a box is permanently removed from the system never to be returned. Once we are advised, the box is marked PERMANENT REMOVAL and all storage charges cease. This is not to be confused with boxes Destroyed. The charge for this service relates to the proper accounting and data entry for the removal of the item from your holdings.

### **3.4 RETENTION**

It is vital that you know how long to keep your records and if your company does not have a Retention and Disposal Schedule in place, we can advise on some general retention rules for the keeping of records for operational, tax and

legal purposes. A retention period is set on the dates of records within the box, otherwise it is set from date of entry into our warehouse.

### **3.5 DESTRUCTION**

Our system allows for an automatic Destruction List, which is produced at set periods listing the boxes that have passed their retention date. A list can also be manually created if you decide you have boxes ready for destruction.

The list is sent to you for checking and authorisation and must be signed off by the appropriate person on the Authorised Signature Access List. You can edit and change retention dates on the list so when it is returned we can update our database.

Once the list is returned with authorisation the boxes will be destroyed by confidential document pulping / shredding and a Certificate of Destruction can be issued if required.

### **3.6 WEB ACCESS**

In order to use **EDCWeb** you must be authorised with TRM. This involves setting up an authorisation and licence with us. You will need a Username and Password.