

Overview

FileBRIDGE Records is a faster, smarter client web interface for customers to use when viewing their Destruction Bin inventory and requesting tip or swap services for the existing bin inventory.

Requesting Bin Services

After logging into the FileBRIDGE Records, customers can access the **Bin Service** menu option or **<Bin Service>** button right on the Home page (Fig. 1).

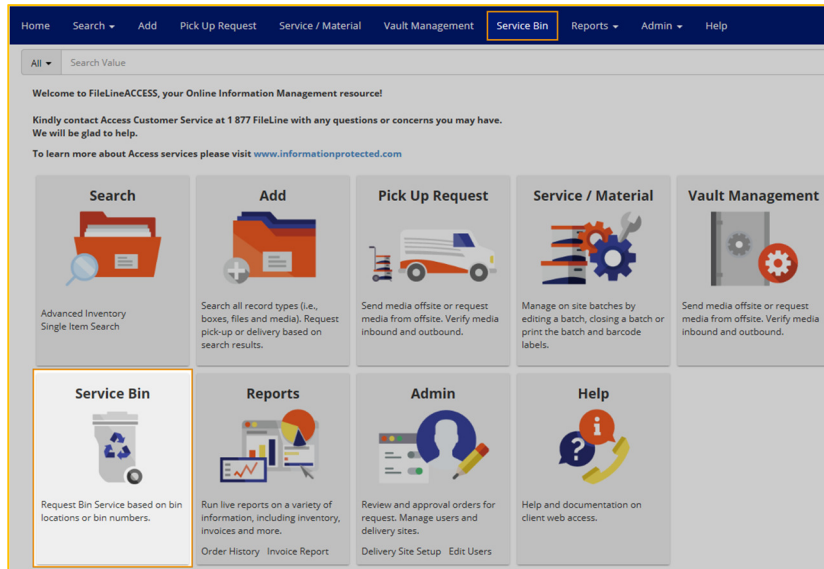


Fig. 1

The Bins Service screen is displayed (Fig. 2).

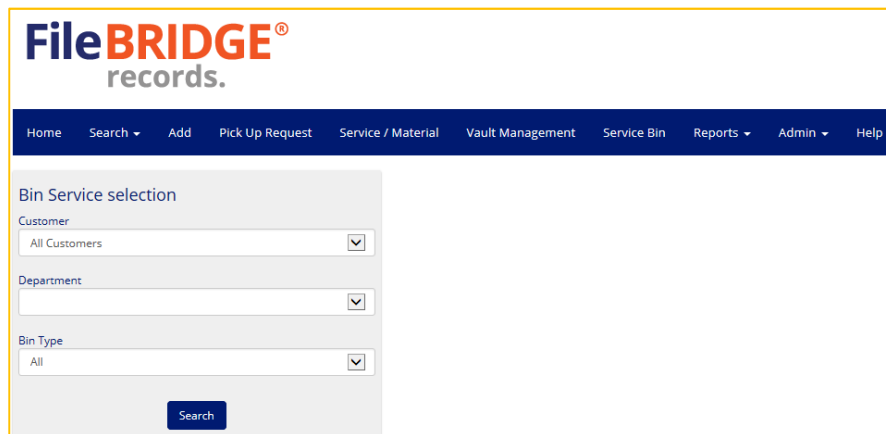


Fig. 2

Use the Search criteria at the left to indicate for which account bin service will be requested, for which department (if applicable) and for which type of bin will service be requested.

After entering the parameters in the Bin Service selection, press the **<Search>** button (Fig. 3).

Bin Service selection

Customer
All Customers

Department

Bin Type
All

Search

Fig. 3

The search results are displayed in the section at the right (Fig. 4).

FileBRIDGE records. Hello MATT HERRON Log Out

All Customers

Items On Order (18)

Home Search Add Pick Up Request Service / Material Vault Management Service Bin Reports Admin Help

Bin Service selection

Customer: All Customers

Department:

Bin Type: All

Showing 1 - 8 of 8

Sort by: Bin Code: Ascending Service All

	Customer: NY/NJ/PA-NYMetro.ACCESS DEMO/TEST ACCOUNT - NY METRO Placement / Description: petes office Bin type: Standard Cabinet	Department: 101.ZZZNYM - LEGAL
	Customer: NY/NJ/PA-NYMetro.ACCESS DEMO/TEST ACCOUNT - NY METRO Placement / Description: X-Ray Room Bin type: Standard Cabinet	Department: 101.ZZZNYM - LEGAL
	Customer: NY/NJ/PA-NYMetro.ACCESS DEMO/TEST ACCOUNT - NY METRO Placement / Description: room 2 Bin type: Standard Cabinet	Department: 101.ZZZNYM - LEGAL
	Customer: NY/NJ/PA-NYMetro.ACCESS DEMO/TEST ACCOUNT - NY METRO Bin type: 96 GALLON BIN	Placement / Description: Bin 1

Fig. 4

Use the Sort By selection to sort the bin results by bin barcode number or placement/description in either ascending or descending order.

The action menu contains the Service Bin option (Fig. 5).

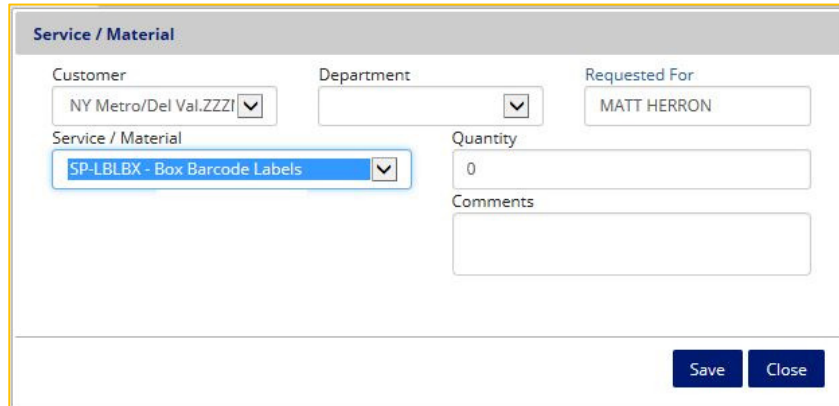


Fig. 5

Service Bin – Click on this option to add the bin service to the shopping cart as a request for either **Tip** or **Swap** service, depending on the destruction bin type settings.

Miscellaneous Service / Material Requests

Use the **Service / Material** menu option to easily request miscellaneous services and/or material sales from the destruction operation. The Service / Material screen will appear (Fig. 6).



The screenshot shows a web form titled "Service / Material". It includes the following fields and controls:

- Customer:** A dropdown menu with "NY Metro/Del Val.ZZZI" selected.
- Department:** A dropdown menu.
- Requested For:** A text input field containing "MATT HERRON".
- Service / Material:** A dropdown menu with "SP-LBLBX - Box Barcode Labels" selected.
- Quantity:** A text input field containing "0".
- Comments:** A large text area for notes.
- Buttons:** "Save" and "Close" buttons at the bottom right.

Fig. 6

Select the type of service/ material requested and the billing department, if applicable. Enter the quantity for each service/ material requested. Use the Comment's field to enter any relevant notes for this request, if needed.

Press the **<Save>** button to add a new service / material request line to the web order.

Press the **<Close>** button to exit the Service / Material screen and return to the shopping cart.

Submitting the Web Order

After all bin service requests have been added to the web order, view the shopping cart by clicking the **Items on Order** option at the top of the screen, under the logged in user name at the right (Fig. 7).

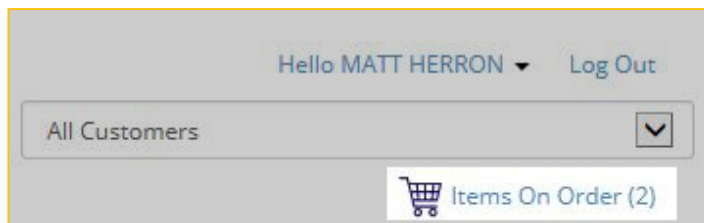


Fig. 7

PLEASE NOTE: The shopping cart will also be made visible after exiting the Service / Materials screen.

The shopping cart will display all web order line items that have not been submitted to the destruction operation at this time, including all previous bin service requests and any other miscellaneous services or material sales requests (Fig. 8).

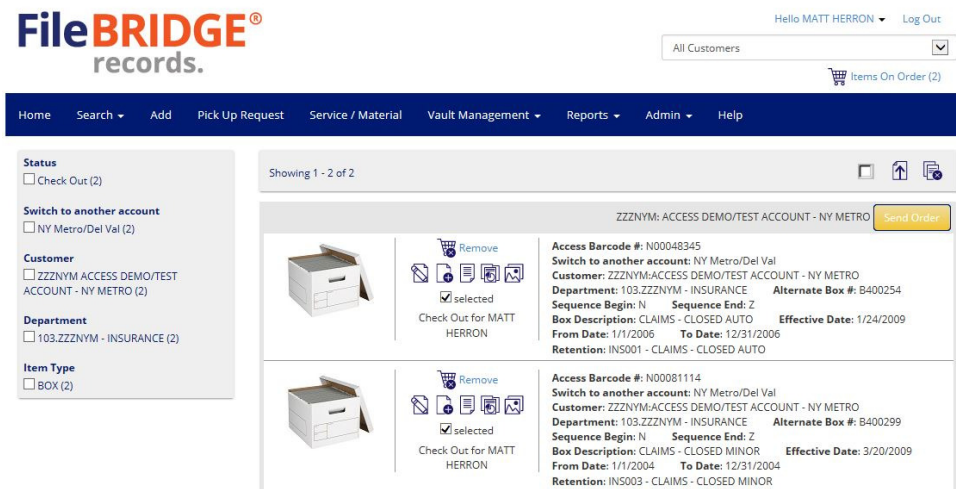


Fig. 8

The menu at the left of the shopping cart can be used to apply filters to the shopping cart for further processing web order lines using a combination of line status (Service Bin, Service / Materials, etc.), customers or departments, if applicable. (Fig. 9).

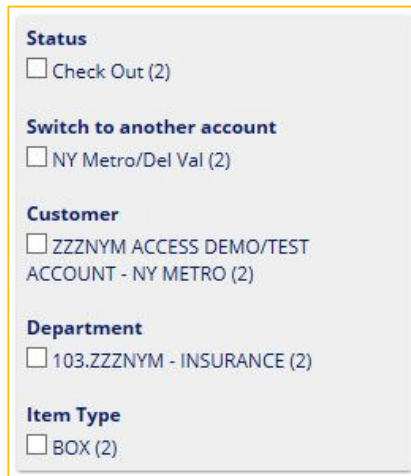


Fig. 9

Use the action menu to select the appropriate action for the appropriate record in the search results (Fig. 10).

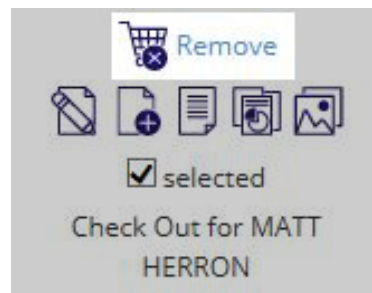


Fig. 10

PLEASE NOTE: Permissions granted to the web user, the settings for the item type in inventory and the inventory status will determine which actions are available in the action menu for any record in the search results.

Remove – Click on this option to remove the single item from the shopping cart at this time.



Edit Item – Press this button to edit the miscellaneous service / material sales line item on the web order. This will display the Service / Material screen for the selected line item (Fig. 11).

Fig. 11

Press the **<Save>** button to update the miscellaneous service / material sales line item. The Service / Material screen will be closed after saving. Press the **<Close>** button at any time to discard any changes made to the web order line item and return to the shopping cart without changing any information.

Use the **<Remove All>** button to remove all listed items from the shopping cart, if needed (Fig. 12).

Fig. 12

Once the shopping cart has been reviewed and all line items are confirmed for action, use the Submit Order button at the right to submit the web order to the records center (Fig. 13).

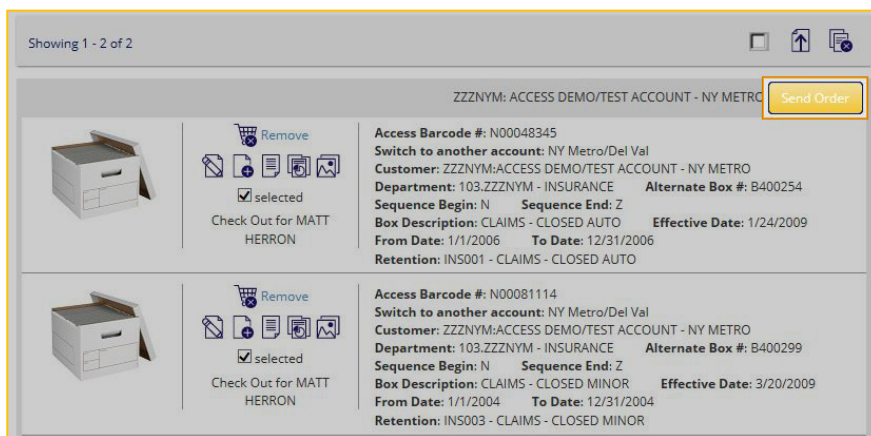


Fig. 13

The Send Order screen will appear (Fig. 14).

Complete Send Order

ZZZNYM ACCESS DEMO/TEST ACCOUNT - NY METRO

Delivery Address

<input type="text" value="Default Delivery Address"/>	<input type="text" value="25 HOME NEWS ROW"/>
Select Delivery Address	Address
<input type="text"/>	<input type="text" value="NEW BRUNSWICK"/>
Building/Floor/Room/Suite/Dept	City
<input type="text" value="NJ"/>	<input type="text" value="08901"/>
State	Zip

Order Information

<input type="text"/>	<input type="text"/>
Customer Order Reference	Select Delivery Priority
<input type="text"/>	<input type="text"/>
Delivery Date	Charge to Department
<input type="text"/>	<input type="text"/>

Comments

Fig. 14

Select or set the appropriate service address, additional order information, the delivery priority to determine the service date and any comments relevant for this order that the destruction operation should be made aware.

Use the Delivery Date field to select a valid delivery date, based on the applicable delivery schedule for the delivery priority selected.

Press the **<Send>** button to submit the web order at this time.

If necessary to send the web order at a later date, press the **<Cancel>** button instead to cancel the send order request and return to the shopping cart. No order will be sent at this time.

The web order confirmation screen will be displayed with the summary of the submitted order, which can be printed or exported to PDF, Image, Word, Excel or HTML format (Fig. 15).

FileBRIDGE records. Hello MATT HERRON Log Out
All Customers
Items On Order (0)

Home Search Add Pick Up Request Service / Material Vault Management Reports Admin Help

Customer: ZZNYM: ACCESS DEMO/TEST ACCOUNT - NY METRO PDF Report

7/19/2016 6:24 AM

OnSite Batch Detail
ACCESS DEMO/TEST ACCOUNT - NY METRO

Customer: ZZNYM - ACCESS DEMO/TEST ACCOUNT - NY METRO
Phone: Requested For: MATT HERRON
Address: 25 HOME NEWS ROW
NEW BRUNSWICK, NJ 08901
Batch Number: 00000019
Requested Date/Time: 7/19/2016 6:24 AM
Due Date:

Notes:
Requested For: MATT HERRON
Item Type: BOX

Access Barcode #	Parent Code	Alternate Box #	Reference 2	Sequence Begin	Sequence End	Action	Location
N00048345		B400254		N	Z	Check In	
N00081114		B400299		N	Z	Check In	

Customer Print Customer Signature Date/Time

Web_OnSiteBatch_01 Rev: 20160508 2:3:16 Page 1 of 1

Fig. 15

Printing and Previewing Reports

Use the **Reports** menu option to print or preview Work Order or Invoice reports from the web (Fig. 16).

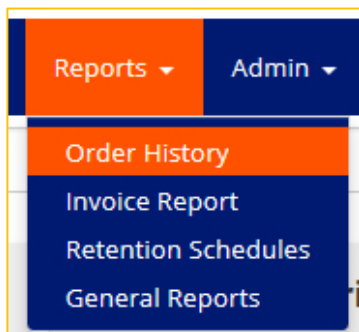


Fig. 16

Work Orders

Select the **Reports > Order History** menu option to search for work orders and/or delivery receipt reports to be printed or previewed. The Order History Search screen will appear (Fig. 17).

Fig. 17

Customer – If needed, select the appropriate customer for printing or previewing work order or delivery receipt reports. Use the <All Customers> option to search across all customers to which the web user has access.

Department – If the Customer selected is departmentalized, use the Department dropdown menu to select the appropriate department.

WO Code Range – Use the Begin and End fields to define the work order range for which to search. Leave the End WO Code field blank to search for only the work order entered in the Begin WO Code field. Leave the Begin WO Code field blank to search for all work orders up to and including the End WO Code value provided.

Due Date Range – Use the calendars in the Begin and End date fields to define the date range for which to search work orders. Leave the End Due Date field blank to search for all work orders due on the Begin Due Date entered. Leave the Begin Due Date field blank to search for all work orders up to and including the End Due Date value provided.

When searching for work orders, use any combination of WO Code range and/or Due Date range as needed. Leaving all WO code range and Due Date range fields blank will return all work orders for the selected customer(s) throughout history.

Search – Press the **<Search>** button after setting the search parameters to return all appropriate work orders that meet the search criteria (Fig. 18).

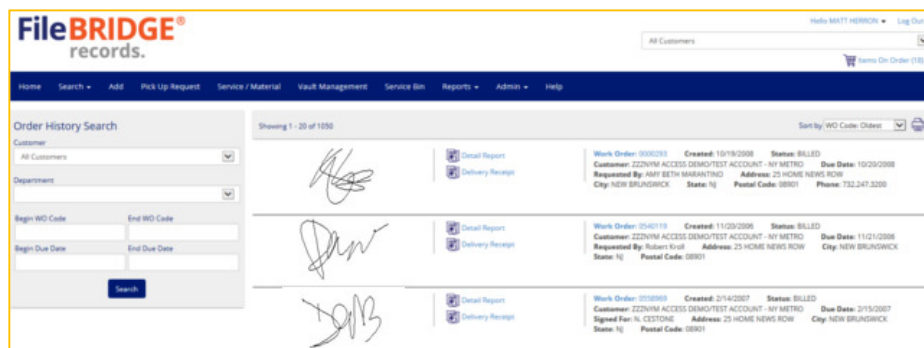


Fig. 18

If the work order has been serviced on site and signed for, the signature will appear at the left.

Work Order detail appears at the right

Detail Report

Click in the **Detail Report** option to view the work order detail report. This is similar to the work order report that is previewed after submitting a work order on the web. Select the format with which to preview the work order detail report (Fig. 19).

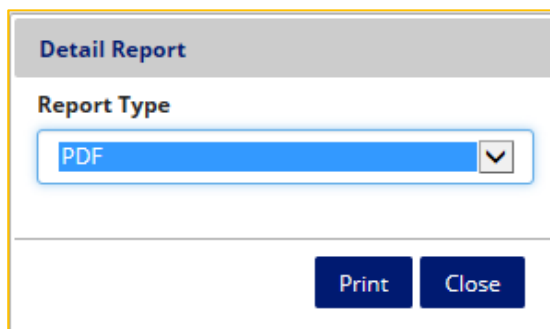


Fig. 19

The default format is PDF. Select either PDF, Image, Word, Excel or HTML formats. Press **<Print>** to preview the work order detail report in the selected format (Fig. 20).

Access/Northeast: NY/NJ/PA-New York Metro

Work Order: 0000293
Due Date: 10/20/2008 4:30 PM

Customer: ACCESS DEMOTEST ACCOUNT - NY METRO Requested By: AMY BETH MARANTINO
Address: 25 HOME NEWS ROW Phone: 732.247.3200
NEW BRUNSWICK, NJ 08901 Route: NYM 04

Priority: Next Day Delivery

Notes: THE INVENTORY ON THIS ACCOUNT DOES NOT EXIST / ITEMS HAVE BEEN ADDED TO TOTAL RECALL FOR THE PURPOSE OF DOING DEMOS OF THE TOTAL RECALL ONLINE PRODUCT

Requested For: AMY BETH MARANTINO

Quantity	Description	Dept	Action
0.00	BX-CSSTD - Case of Storage Boxes - Standard Complete / 25 per case		Miscellaneous
0.00	BX-CSSTD - Case of Storage Boxes - Standard Complete / 25 per case		Miscellaneous

Driver Signature Date / Time Customer Signature Date / Time Manager Signature Date / Time

Fig. 20

The work order detail report includes details for service address and date, relevant service notes entered, services performed, extra material collected, seal barcodes scanned, dump bin processes performed, and calculated bin or work order weight, when applicable. Driver, customer and/or manager signatures and the date/time that the signature was collected as well as any appropriate Certificate of Destruction verbiage are all printed on the report, when available.

Delivery Receipt

Click in the **Delivery Receipt** option to view a copy of the delivery receipt, after service has been performed and the scan data has been uploaded. Select the format with which to preview the delivery receipt (Fig. 21).

Delivery Receipt

Report Type

PDF ▼

Fig. 21

The default format is PDF. Select either PDF, Image, Word, Excel or HTML formats. Press **<Print>** to preview the delivery receipt in the selected format (Fig. 22).

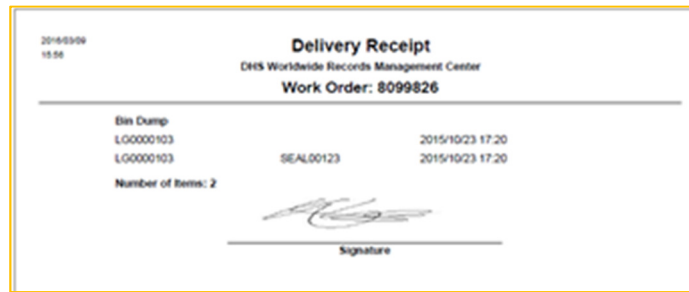


Fig. 22

The delivery receipt report will provide a summary of services provided. Customer signature is printed on the report, when available.

Invoice Report

Select the **Reports > Invoice Reports** menu option to search for invoices, re-print/print reports that have PDF images attached. Credit card payments can be applied to an invoice, when applicable (Fig. 23).

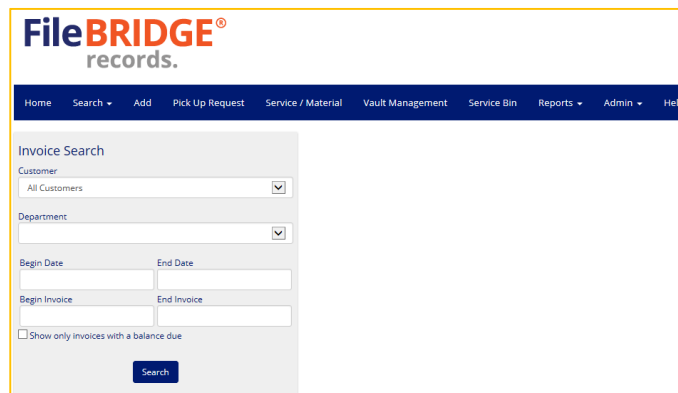


Fig. 23

Customer – If needed, select the appropriate customer for printing or previewing invoice reports. Use the <All Customers> option to search across all customers to which the web user has access.

Department – If the Customer selected is departmentalized, use the Department dropdown menu to select the appropriate department.

Invoice Date Range – Use the calendars in the Begin and End date fields to define the date range for which to search invoices. Leave the End Date field blank to search for all invoices due on the Begin Due Date entered. Leave the Begin Due Date field blank to search for all work orders up to and including the End Due Date value provided.

Invoice Range – Use the Begin and End fields to define the invoice range for which to search. Leave the End Invoice field blank to search for the only the invoice entered in the Begin Invoice field. Leave the Begin Invoice field blank to search for all invoices up to and including the End Invoice value provided.

Search – Press the **<Search>** button after setting the search parameters to return all appropriate invoices that meet the search criteria (Fig. 24).

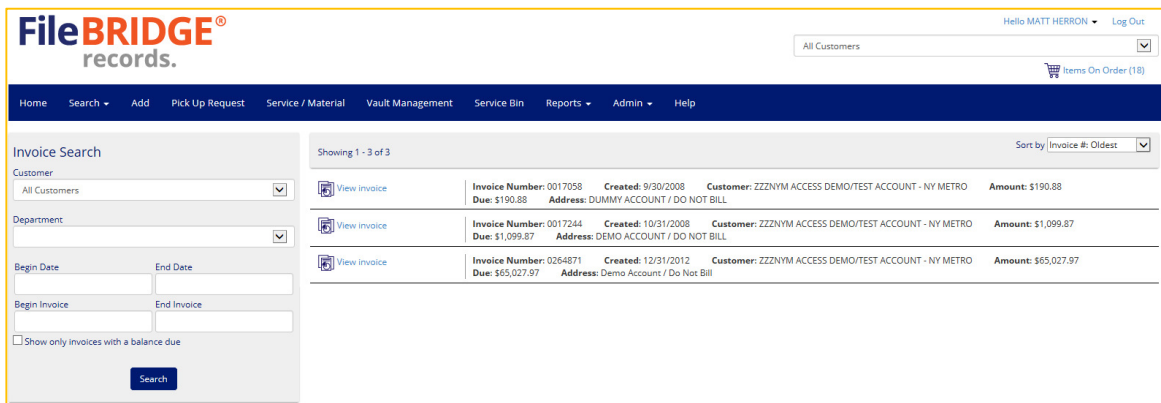


Fig. 24

Invoices that have PDF images attached will have the **View Invoice** option at the left.

If credit card payments are possible, the **Pay This Invoice** option is available at the left, as well as the **<Pay All Invoices>** button at the top. For more information on processing credit card payments, please refer to the *Processing Credit Card Payments* Quick Reference Guide

Invoice Report

Click in the **View Invoice** option to view the invoice report in PDF format (Fig. 25).

QTY	BOXES	SERVICE DESCRIPTION	QUANTITY	RATE	TAX	CHARGE
STORAGE						
Storage Period: 09/01/2008 - 09/30/2008						
1	1.2 cu ft - Standard Letter/Legal Box: Pro-Rata		1.20	\$0.2400	Y	0.29
Storage Period: 10/01/2008 - 10/31/2008						
1	Special Collections Library Storage		1.20	\$1.3400	Y	1.61
3	3.6 cu ft - Large Legal Box		10.80	\$0.2400	Y	2.59
2	2.4 cu ft - Large Letter Box		4.80	\$0.2400	Y	1.15
242	1.2 cu ft - Standard Letter/Legal Box		290.40	\$0.2400	Y	69.70
1	Special Collections Storage - Standard Box 1.2 cu ft		1.20	\$2.0800	Y	2.50
Storage Period: 11/01/2008 - 11/30/2008						
1	Special Collections Library Storage		1.20	\$1.3400	Y	1.61
3	3.6 cu ft - Large Legal Box		10.80	\$0.2400	Y	2.59
2	2.4 cu ft - Large Letter Box		4.80	\$0.2400	Y	1.15
242	1.2 cu ft - Standard Letter/Legal Box		290.40	\$0.2400	Y	69.70
1	Special Collections Storage - Standard Box 1.2 cu ft		1.20	\$2.0800	Y	2.50
Total for STORAGE						\$155.38
SUPPLIES						
	Case of Storage Boxes - Standard Complete / 25 per case		0.00	\$50.0000	Y	0.00
Total for SUPPLIES						\$0.00
TRANSPORTATION						
	Standard Transportation		1.00	\$23.0000	Y	23.00
Total for TRANSPORTATION						\$23.00

Fig. 25

The invoice report includes all billable line items for all work orders, services and applicable storage charges.