

HOW TO ACCESS DOCUMENTS IN THE CALIBER PORTAL



Elliott Merrill

COMMUNITY MANAGEMENT



Home



Profile



Accounting



Compliance



Maintenance



Architectural



Web



Documents



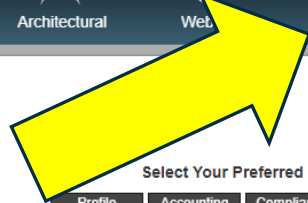
Directory



Notifications

Primary Account - Primary

Balance: \$250.00



Select Your Preferred Owner QuickView

Profile 	Accounting 	Compliance 	Maintenance 	Architectural
Web Links 		Directory 	Notifications 	

Select Your Preferred Owner QuickView

Profile 	Accounting 	Compliance 	Maintenance 	Architectural
Web Links 		Directory 	Notifications 	

- First Select the **Documents** icon at the top of the screen to access the documents menu.

**The documents icon located in the 'Owner Quick View' area will show a consolidated documents list with folder names on the left side of the screen. For more complete navigation the documents should be accessed through the documents link at the top of the screen.



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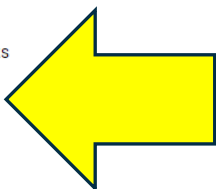
Directory



Notifications

Document Folders

- Forms
- Contracts
- Governing Documents
- Public Documents
- Meeting Minutes



Show 10 items per page

Available Documents

Document Name	Size	Upload Date	View Options
How to Access the Directory.pdf	795.8 KB	10/16/2020	PDF
Owner Portal Guide.pdf	1.9 MB	10/16/2020	PDF
Caliber Portal Registration.pdf	1.0 MB	10/16/2020	PDF
How To Submit Work Orders.pdf	1.3 MB	10/16/2020	PDF

- Next make sure to select the folder on the left hand side of the screen for the type of documents you wish to access.

On the right side of the screen you will see all available documents that pertain to that folder. Under 'View Options' you will see 'PDF' which will access the document using the settings on your browser which may either view the document in browser or download the document. If you select the icon this will open the document in browser. If you select the icon the document will be downloaded to your computer, which typically defaults to your 'downloads' folder in windows.



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- Please also be aware that if you have more than [10] documents in a folder you will need to change the number in the “Show [10] items per page” section to a larger number so that all the documents will be displayed.
- Also be aware that the “Public Documents” folder is utilized to categorize any documents that are displayed on the public landing page for your community on the Elliott Merrill website, these documents may also be present in other document folders.

IN CONCLUSION

The benefits of the Caliber Documents System are as follows:

- ▶ Provides easy to navigate folders for each type of document.
- ▶ Provides options for displaying the document in browser or downloading the documents.
- ▶ Provides the ability to display public documents to community landing pages in real-time using the Caliber Cloud.