

Crest Portal Naming Rules

General Rules for all Libraries as everything is viewable to the public:

- Name and Title should always be the same
- Please use the proper capitalization rules. For example, “Articles of Incorporation” or “Deed to Reserves D and E” or “Holt and Young Legal Agreement”. Do not use all caps or all lower case.
- Please make sure your spelling is correct.
- Do not include the communities name in the title.
- All fields must be filled in unless otherwise specified.

Libraries:

Community Information –

Content Type – Community Information

Items that fall under Community Information: Common Area, Commercial, Community Correspondence, Board Correspondence, Community Maps (ex. Landscape Map), Internal Forms, Public Forms

- Name and Title should be the date of the document (if applicable) and the name of the document. For example: “20140608 Garage Sale Mail out” (Community Correspondence) or “Landscape Map” (Community Maps) or “20140508 Board Discussion about adding a park” (Board Correspondence) or “2014 Gate Access Form” (Public Form) or “20150102 Theresa Cox Resignation from the Board” (Board Correspondence)

Content Type – Inspection Report

- Name and Title should be the date of the inspection and the document type. For example: “20140929 Inspection Report”

Content Type – Public Forms – MUST BE IN PDF FORMAT!!

- Name and Title should be exactly how you want the form to appear to the public.

Contracts –

Content Type – Contracts – This should include the vendor’s certificate of insurance as well.

- Name and Title should be the Inception Date, Vendor Name, and type of Contract. For example, “20140612 Holt and Young Legal Agreement” or “20141231 IMS Landscape Contract” or “20140801 Startex Electricity Contract” or “20140631 Crest Administrative Agreement”

- The insurance policy for the Contractor should be scanned in the Contract Content Type and named accordingly. For example: “20141231 IMS Landscape Certificate of Insurance”
- Choose your type of contract from the drop down list or specify what type in the other field.
- Fill in the remaining fields accordingly.

Content Type – Bids – This should include the vendor’s certificate of insurance as well.

- Name and Title of approved bid should be the Vendor Name, Bid Type and Month and Year the bid was approved. For Example, “McKenna Construction Shade Structures July 2014”
- Name and Title of rejected bids should be Bid Type and Month and Year the bid was rejected. For Example, “Shade Structures July 2014”
- Fill in the remaining fields accordingly.

Content Type – Permits

- Name and Title of permits should be the date signed, permit type and vendor name. For Example, “20130408 Storm Water Permit with Storm Water Solutions”
- Fill in the remaining fields accordingly

Corporate Records –

Content Type – Governing Documents:

Items that fall under Corporate Records: Articles of Incorporation, By-Laws, Deed, Policy/Resolution, Section Restrictions, Rules, Lawsuits, Architectural Guidelines, Management Certificate, Certification of Formation, Plat Map (Official **Recorded** Maps Only, all other maps are to be loaded in Community Information under Community Maps)

- Name the file the title of the document. However since it will be uploaded to the certain community site the name of the community is not necessary. For example, you will title the document “By-Laws” not “Governor’s Place By-Laws”
- In the “Recorded Date” Column please enter the Date Recorded if the document does not have a recorded date on it please enter the Date Signed.
- If a document is for a specific section you may select it from a list. If the document is for all sections – just leave blank. If a document is for multiple sections but not all, it needs to be loaded and tagged for all sections that apply. This will require the document to be loaded multiple times.

Financial Records –

Content Type – Monthly Financials:

Items that fall under Financial Records: Balance Sheet, Income Statement, Accounts Payable, Accounts Receivable, General Ledger, Bank Statement, Check Register, Management Report

- Name should be the date and the report type. For example, “ 20140531 Balance Sheet” and/or “ 20140531 Accounts Receivable”
- Date should be the date for the accounting period it represents – the date on the report. The fill the remaining information – in regards to the date again enter the information from the report (not your current date – should be last day of the month)

Content Type – Audit

- Name and Title should be the date the audit was completed and the name of the company who performed the audit. For example “20150206 Audit completed by Barry Wuntch”
- Date Completed should be the date that the audit took place or date on the report
- Audit Year should be the year that the audit was of. For example, “2008 – 2009” or “2010”

Content Type – Reserve Study:

- Name and Title should be the name of the company and the association name. For example “Reserve Study completed by Reserve Advisors”
- Date Completed should be the date that the reserve study took place or date on the report

Content Type – Tax:

Items that fall under Tax: Franchise Tax Return, Income Tax Return, Form 990, Change of Address, Change of Agent, Form 990Z, Form 1120H, Correspondence – IRS, Correspondence – Board

Content Type – Bank Information:

Items that fall under Bank Information: Signature Cards, CD Information, Account Set-Up, Credit Card Processing Form

Content Type – Budget:

Items that fall under Bank Information: Excel Spreadsheet, Pie Chart, Billing Insert, Other

- Name and Title should be the year and the name of the budget document. For example, “2014 Approved Budget” or “2013 Billing Insert”
- Fill out remaining fields

Content Type – Promissory Note/Loan Information:

- Name and Title should be the signed date of the document and the name of the document. “For example, “20140703 Promissory Note” or “20120806 Loan Information”
- Fill out remaining fields

Homeowner Files –

Content Type – Homeowner Correspondence:

Items that fall under Homeowner Correspondence: Correspondence (this is where a Change of Address is added), Legal Correspondence, Collections, Change of Ownership

- Correspondence, Legal Correspondence, Change of Ownership and Collections:
 - Name and Title – Address, Type of Correspondence, Date Submitted, with the date format: 03.03.2014 (you cannot use slashes or colons in the name field) Make the Type of Correspondence descriptive. For example, “12345 Main Street Variance Letter for Storage Shed 03.03.2014” (Homeowner Correspondence), “45678 Happy Lane DR Extension for Mildew on Home 03.03.2014” (Homeowner Correspondence), “11223 Right Blvd. Letter from Homeowner in regards to DR Weeds in the flowerbed 03.03.2014” (Homeowner Correspondence) “77889 Crest Drive Settlement Statement 03.03.2014” (Change of Ownership)
 - Date – Date of the correspondence
 - Homeowner Document Type – Correspondence, Legal Correspondence, Change of Ownership and Collections
 - Start typing the address and it will auto populate

Content Type – Exterior Modification Requests:

- All EMR’s are to be scanned through Paper Stream and directly into Crest.
 - The naming governance should still be Last Name of Homeowner, Modification Type and Date submitted. For example: “Smith Storage Building 03.05.2015”
 - If you have multiple attachments you may describe it in the middle section. For example: “Smith Storage Building Board Decision 03.05.2015”

Insurance – This is only association insurance not vendor insurance.

- Name and Title should be the valid dates, the company who the policy is with and the name of the document as it appears. For example, “082015-082016 BCH Statement of Values” or “082015-082016 BCH Certificate of Insurance”
- Fill in the remaining fields accordingly.

Legal –

Content Type – Legal Correspondence

Items that fall under Community Information: Legal Status Report, Legal Opinion, Legal Correspondence, Litigation Report

- Name and Title should be the date of the document and the name of the document. For example: “2011 Legal Opinion on Garage Sales” or “20140831 Legal Status Report” or “20140831 Litigation Report”
- On the Litigation Reports mark when they are Active and Archive.

Meetings –

Content Type – Minutes:

Items that fall under Minutes: Annual, Board, Special, Executive Session, General

- Name should be the day of the meeting type of meeting. For example, “20140501 Board Meeting” and “20130105 Annual Meeting”
- Fill out remaining fields

Content Type – Annual Meeting:

Items that fall under Annual Meeting: Meeting Notice, Sign-In Sheet, Original Ballot, Signed Ballots, Tabulation Results, Confirmation of Location, Mailing List, Other

- Name should be year of the meeting and annual meeting document type. For example, “2013 Original Ballot” or “2013 Sign-in Sheet” or “2013 Email Confirmation of Rental of Lamkin Elementary”
- Fill out the remaining fields.

Content Type – Board Meeting – **Your agenda must be loaded for the board meeting notices to be sent to the homeowner 96 hours prior to the meeting.**

- Name and Title should be meeting date and board meeting document type. For example “20140206 Board Packet” or “20140106 Agenda”

Content Type – Special Meeting:

- Name and Title should be meeting date and special meeting document type. For example “20140305 Board Packet” or “20131115 Agenda”