HOW TO: Use HITS (Home Inventory Tracking System)

A. Location of HITS

1. Log into ManageAmerica.
2. Go to OpCenter Button, located on the bottom left of the QUICKACCESS screen.
3. Select Home Tracking
4. The Home Tracking Screen will open. The list of inventory for your community will be listed.
5. The Home Tracking screen is divided into three tabs. They are (1) the **Tracking Tab** that shows a listing of your current inventory, (2) the **Archive Tab** that shows a listing of all the sales and asset disposals that occurred at your community and (3) the **Reports Tab** that gives you options for running various reports on community inventory.

B. The Tracking Tab

1. This tab gives a complete listing of home inventory at your community. There are two types of inventory: I (Inventory owned by the community) or 3P (inventory for sale by a third party).

   The Home Inventory list is based on the SOS code input in QuickSet 1.0. In order to accurately reflect the inventory at your community, SOS codes/occupancy changes should be performed in real time.

2. Columns in the Home Tracking Screen: The Tracking screen displays a summary of information on the home inventory. Inventory may be sorted by each of the columns by clicking on the column title. For example, to see a listing of inventory sorted in sequence by the site #, click on the site # column. The following columns appear in the Home Tracking Sheet:

Home Rehab Status	For inventory homes, the ready or make ready status as currently reflected in the Home Record.
Type	This stands for the type of inventory. I = community owned inventory, 3P = third party inventory for sale.
Community Name	The name of the Community.
Space	The site # where the home is located.
SOS	This is the SOS (Site Occupancy Status) code that has been input in QuickSet 1.0 for this site #.
Year	The year taken off the title
Manufacturer	The manufacturer taken off the title
Acquisition Cost	For inventory, only. The amount paid to acquire the home.
Total Cost	For inventory, only. The total amount paid to acquire and rehab the home.
Listing Price	The current sales price of the home.
Days on Market	The total # of days the home has been listed for sale

3. Using the "GoTo" field: Should you want to find the home record for a specific serial number or Home Approval Code/HAC (if that code is in use by your company), enter the number in the "GoTo" field and click on the Community Name in the "Filter" field.

4. Using the "Filter" field: users that require viewing of multiple communities may select needed communities from the drop down menu in the filter field.

5. Adding a home to HITS: When a site is coded to Company Owned or Pending Resale in the QuickSet 1.0, it is automatically listed in HITS. You may then open the Home Record and add additional data. If you wish to add a home manually, you will do so by clicking the ADD HOME button on the Tracking screen. Select the community and site number. If it is inventory, enter the data into the Home Record and save. If it is 3P, be sure to select the "Third Party Sales" button before entering the home record data.

6. The Home Record: To obtain and input additional information about an individual home, click on the line for any individual Home Record (the line will be highlighted). This will bring up a window with detailed information about the home.
    i. Select Home: These fields will indicate the location of the home you are viewing. While in this window, you may change the Home Record you are viewing by using the drop down menu for site # or using the GoTo field.
    ii. Home Information: These fields will provide detailed general information on the home. Input of information by the community in this section includes: Year, Manufacturer, Model, Size and Date Entered the Community. Click the Additional Home Info link to add additional information such as length, width, home serial #, number of bed and bathrooms. Note that this information will auto-populate the QuickSet 1.0 Home Details screen and vice versa. Save any data entry by clicking the SAVE button at the bottom of the screen.
        1. Uploading digital photos: format your photo on your computer and save as a .jpeg or .jpg. The recommended size is 400 x 300 pixels. Click the Add Photo Link. Use the Browse button to find the file on your computer. Enter a caption. Use the calendar to select the date the photo was taken. Click SAVE. The home record will refresh to show the photo. Add additional photos by repeating the process. Click on the photo to see all photos uploaded and to delete.
        2. Uploading documents:
    iii. Third Party Sales Information: These fields will provide detailed information on the seller and eventually the buyer. Click the additional info link to add seller, agent and buyer information. To save any entry, click the "Update Sale Info" button.
    iv. Inventory Tracking: These fields are used to track the home from the point it is acquired by the company to the time it is sold. Enter any of the data and save it by clicking the "Update Home Inventory Tracking Info" button.
        1. Acquisition: this section shows date of purchase, purchase price, seller information, etc.
        2. Home Costs: expand the additional data section to reveal tracking fields of budgeted vs. actual expenses to rehab and/or set up the home. You may also use this section to track rehab status.
        3. Expenses of Sale: use this section to enter any money spent on broker's fees, escrow title or flooring (line of credit/home financing costs).
        4. Disposition: use this section to enter the sales information before, during and after the home is sold. It includes an "Estimated Monthly Payment Calculator." Once the home is sold, the sales price and buyer information should be entered before the home is archived.

v. Notes: At the bottom of each Home Record is a notes section. This is an area where additional notes on the home may be input. Items might include carpet color, appliance serial #s, vendor names, etc. With input of information, a date and initials is useful in tracking comments in the system.

7. Quick Reports: There are seven key reports that may be run from the Tracking Tab in HITS. To access Quick Reports, scroll to the far upper right hand corner of the Tracking Tab of the Home Tracking Screen. There will be a drop down box for all Quick Reports available for a community. The reports may be sorted by column header, exported to excel or printed directly from the web by "right clicking with your mouse on the web report. The reports include:

Report Name	Description
Community Inventory Report	Provides a complete listing of all inventory ("I") homes at a community.
Community Inventory Report – 3rd Party	Provides a complete listing of all third party homes for sale ("3P") homes at a community.
Vacant Home Report	Provides a complete listing of all vacant inventory homes at a community.
Sales Report Standard	Provides a complete listing of all funded sales at a community in a specified time period.
Sales Report – Homes Sold by Type	Provides a complete listing of all funded sales at a community organized by type of home (if there is more than one type).
Occupancy Changes for Inventory SOS	Provides all SOS changes on inventory records at a community for a specified time period.
Homes and Vacant Sites	Provides a complete listing of all sites with SOS Vacant and any others that also have HITS entries.

C. <u>The Archive Tab</u>

1. The Archive Tab includes all sales and asset disposals at the community selected. Like the Tracking Tab, the Archive Tab may be sorted by each of the columns appearing in the tab. When the Date Sold Field and Sales Price field are completed and saved and the ARCHIVE button pressed, the Home Record will automatically be removed from the Tracking Tab and placed in the Archive Tab.
2. Like the Tracking Tab, each individual Home Record may be reviewed by clicking on the Home Record Line. Input of information into the Home Record is no longer possible once it is in the Archive Tab.

D. <u>The Reports Tab</u>

1. The Reports Tab is a tool for users to run reports with greater detail. While the Quick Reports will provide the majority of daily information needed at the community, the Reports Tab will allow specific reports to run by home type, purchase and sold date, listing prices, etc.
2. Be sure to select the type of homes you wish to see on your report: all homes, only inventory ("I") or only third party ("3P").
3. Use the selectors to customize your report criteria. If you wish to save this report as template to use again, enter the name of the template in the Create Template field (for example, "Make Ready Report"), then click the CREATE button. Each time you return to the Reports Tab, you will be able to select that report from your Report Templates menu.
4. After selecting your report criteria, click the Create Web Report button to open as a web page (this version may also be converted to excel. If you wish to open your report directly in excel, click the Create Excel Report button.
5. You may reset the criteria at any time by clicking the Reset button.

E. <u>HITS QuickTips:</u>

1. Sites with the SOS codes Company Owned and Pending Resale will AUTOMATICALLY create HITS entries.
2. Changing an SOS from Company Owned or Pending Resale to any other SOS code will generate this prompt: "Warning: this site has an active HITS entry. Changing its SOS does NOT automatically archive the home in HITS."
3. If your community is just starting to use HITS and there are no home records on the Tracking Tab, review your Rent Roll. Are there sites coded to "Resident Occupied" that are (for example) actually "Pending Resale?" If so, follow the instructions in item 7 below, then return to HITS to populate the Home Record.
4. The only way to archive a home is in HITS. Be sure to enter the relevant data (sales price, date sold, buyer info, etc.) before archiving the home.
5. If you find a home on the tracking tab that is not listed on your Quick Reports, it is due to lack of data. Open the Home Record, enter all of the details and SAVE.
6. The Tracking Tab and all reports will only be accurate if the data is maintained in a timely fashion: process occupancy changes in real time. When you have a new inventory home, enter the data in HITS. When it is sold or removed, do the archiving in HITS.
7. If an SOS code in HITS is incorrect, perform the required change. For example, if your HITS entry says Resident Occupied and should be Pending Resale,
    - i. Go to Resident Admin
    - ii. Select the site/resident and click GO
    - iii. Open the QuickSet 1.0
    - iv. Change the SOS to Pending Resale.
    - v. Click Save and Close
    - vi. Return to HITS and update the Home Record with all additional data.