



HomeKeeper Features

Follow homebuyers every step of the way, from inquiry through resale!

- Manage inquiries and waitlists
- Keep track of demographics and individual information for each household member
- Document gross and eligibility income by individual source
- Applicant Assets and Debts tracking
- Document referral and reference information
- Purchase and Resale Transaction Details (HUD-1 data, appraisal information)
- Documents details of homebuyer purchase and refinance loans
- Itemize purchase funding sources, including loans from program funds to homebuyers
- Counseling and Education tracking and HUD 9902 reporting for counseling agencies
- Homebuyer post-purchase monitoring and annual compliance tracking
- Exit Survey documentation

Service File
Jones Homeownership

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#)

[Back to List: Services](#)

[Service File History \[5+\]](#) |
 [Open Activities \[0\]](#) |
 [Activity History \[3\]](#) |
 [Monitoring Events \[5+\]](#) |
 [Application Household Members \[4\]](#) |
 [Income Sources \[4\]](#) |
 [Assets \[2\]](#) |
 [Debt \[0\]](#) |
 [Funding Sources \[3\]](#) |
 [References \[0\]](#) |
 [Appraisals \[1\]](#) |
 [Improvements/Adjustments \[1\]](#) |
 [Counseling/Education \[1\]](#) |
 [Pricing Snapshots \[4\]](#) |
 [Notes & Attachments \[0\]](#)

Service File Detail [Edit](#) [Delete](#) [Clone](#) [Sync Buyer/Seller Data](#) [Certify Income](#) [Certify Purchase](#) [Seal Record](#)

Service File Name	Jones Homeownership	Property	555 Main Street
Applicant	John Jones	Initial Purchase	<input checked="" type="checkbox"/> Yes
Co-Applicant	Debbie Jones	Record Type	Homeownership [Change]
Program		Status	Current Owner
Staff Notes	<input checked="" type="checkbox"/> Hard File Missing Copies of original credit report		
		Initial Contact Date	<input checked="" type="checkbox"/> 1/1/2000
		Income Certification Date	<input checked="" type="checkbox"/> 10/21/2011
		Purchase Certification Date	<input checked="" type="checkbox"/>
		File Sealed Date	<input checked="" type="checkbox"/>

Application Workflow

Watched DVD	<input checked="" type="checkbox"/>	Credit Report Fee Paid	
Within the Income Range	<input checked="" type="checkbox"/>	Credit Report Obtained	<input checked="" type="checkbox"/>
Work Documentation	<input checked="" type="checkbox"/>	Credit Score	720

Everything you've always wanted to know about your properties, at your fingertips!

- Document property details and characteristics
- Retain neighborhood details and characteristics
- Track changes in HOA dues and lease payments owed
- Keep track of development costs, and construction/rehab scopes by contract, use, and/or vendor, and date
- Preserve property appraisal data over time

- Record annual assessed values and tax assessment histories
- Itemize repair & property improvements made by homebuyers over time
- Accessibility and Green building feature tracking
- Track monitoring events associated with the property
- Itemize grants, subsidies and loans allocated to each property

Property
 **99 Main Street**

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this](#)

[← Back to List: Services](#)

[Appraisals \[0\]](#) | [Assessed Values - Property Taxes \[0\]](#) | [Services \[1\]](#) | [Fees \[0\]](#) | [Development Costs \[1\]](#) | [Improvements & Adjustments \[0\]](#) | [Housing Opportunity Allocations \[1\]](#) | [Notes & Attachments \[0\]](#) | [Monitoring Events \[0\]](#)

Property Detail [Edit](#) [Delete](#)

Property Address	99 Main Street	Purchase Price	\$1,000,000.00
City	Newport	Planned Number of Units	1
State	RI	Total Development Costs	\$50,000.00
Zip/Postal Code	02840	Total Improvements & Adjustments	\$0.00
Source of Home	New construction	Total Allocations	\$50,000.00

Improve your program by implementing effective practice strategies!

- Certify gross and eligibility income and % of AMI
- Capture buyer's investment and seller's returns at resale
- Document annual occupancy certification and proof insurance verification
- Tracks property and homebuyer subsidies over time by source
- Track mortgage characteristics and refinancing activity
- Capture and seamlessly submit national performance data
- Create custom reports and dashboards to help improve your services and better manage properties, grants and loan activity

Activity History [Activity Histor](#)

[Log A Call](#) | [Mail Merge](#) | [Send An Email](#) | [View All](#)

Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Owner Occupancy Verification Form	John Jones	✓	11/10/2011	Laura Meerkatz	11/10/2011 12:36 PM
Edit Del	Owner Occupancy Verification Form	John Jones	✓	10/24/2011	Laura Meerkatz	10/24/2011 1:40 PM
Edit Del	Email: Annual Letter for 555 Main Street	John Jones	✓	10/24/2011	Laura Meerkatz	10/24/2011 11:24 AM

Monitoring Events [Monitoring Events](#)

[New Monitoring Event](#)

Action	Event Name	Monitoring Event Type	Date	Status
Edit Del	ME-000006	Request to Refinance	11/3/2011	Active
Edit Del	ME-000004	Late Payment	9/15/2011	Active
Edit Del	ME-000003	Request for Improvement	9/14/2011	Active
Edit Del	ME-000000	Occupancy Certification	6/15/2011	Resolved
Edit Del	ME-000002	Late Payment	4/15/2011	Resolved

Get the support you need anytime at the online [HomeKeeper forums and knowledge base!](#)

User Documentation »

Tips & Tricks (5) »

- Upload Attachments to Development Costs
- How to make sure you don't over allocate your funding sources
- Funding Sources - Keeping your data clean

How do I... (11) »

- How do I track deceased contacts?
- How do I know which fields are part of the National Roll-up?
- How do I edit the Help Text?

Behind The Scenes (5) »

- Current Homeowner and Current Co-Owner fields populated when Service F
- How "Current Service File" on the Property Object is Determined
- "Subsidy Beyond Market Value" in detail

Training Materials (1) »

- Intro to HomeKeeper - Seattle - October 2011 - Slides and Handouts

Task-Specific Instructions (12) »

- How To Change Picklist Values
- Overview of Merge Functions
- Install Connect for Office

User Manual (20) »

- Create a New Housing Opportunity
- Creating a New Dashboard
- Creating a New Property

Salesforce.com Resources (9) »

- Salesforce's Non Profit Starter Pack (NPSP)
- Reports and Dashboards
- Using In-line editing in Lists

Standard Salesforce Features

Take advantage of Salesforce.com's robust features!

- High Performance Scalable Database
- Flexible Search Engine
- Multiple Users, Simultaneous (and Mobile) Access, Anywhere in the World
- Each Organization Owns Its Database, Data and Relationship with Salesforce.com
- Microsoft Office & Outlook integration. Google Docs and Apps integration.
- Built-In mail merge and email merge
- Easy access to your data, with no vendor lock-in
- Shared calendars, task management, online document storage
- Customizable layouts, permissions, user profiles and access privileges
- Access to thousands of applications on Salesforce's [appexchange.com](#)



Centralize your organization's contact database!

- Track contact information (names, addresses, phone numbers, email addresses, etc.)
- Communication tracking, monitoring and delivery

- Business and interpersonal relationship tracking
- Duplicate contact and business removal tools
- Task, activity, and calendaring functionality

Manage your incoming grants, loans and donations!

- Track status, amount, date, reporting deadlines and requirements
- Record payments received

Open Activities [0] Activity History [0] Contact Roles [0] Payments [1] Allocations [2] Stage History [1] Notes & Attachments [0]			
Opportunity Detail Edit Delete			
Opportunity Name	Housing Fund Grant 2008	Opportunity Owner	Tiffany Eng [Change]
Account Name	City of Oakland	Opportunity Record Type	Housing Opportunity [Change]
Close Date	1/1/2008	Stage	Closed Won
Amount	\$200,000.00	Probability (%)	100%
Grant/Loan Extension Date		Type	Grant
Affordability Period (Months)		Type Detail	Local Government
Description	Pre-development Funds for Main Street Homes.		
Next Step			
Allocation Type(s)	Property		
▼ Payment Information			
Payments Made	\$200,000.00	Grant/Loan Number	08-2432423
Payments Scheduled	\$0.00	Grant/Loan Start Date	1/1/2008
Amount Outstanding	\$0.00	Grant/Loan End Date	12/31/2008
Next Payment Due		Reporting Requirements	
▼ Allocation Information			
Operating Funds	\$0.00	Outstanding Property Allocations	\$72,000.00
Cost of Funds	\$0.00	Outstanding Service File Allocations	\$0.00

Reporting and Dashboard Features

- Standardized, pre-configured reports
- Drag and drop, point-n-click report builders for fully customizable reporting
- Data export to comma delimited or Microsoft Excel files
- Printable views and formatting
- Programmable delivery schedules for reports-by-email
- Customizable dashboards and data visualization tools

