



**TitleFlex**  
by Data Trace

# FILTER CATALOG FOR FARMING

Rev. 201801

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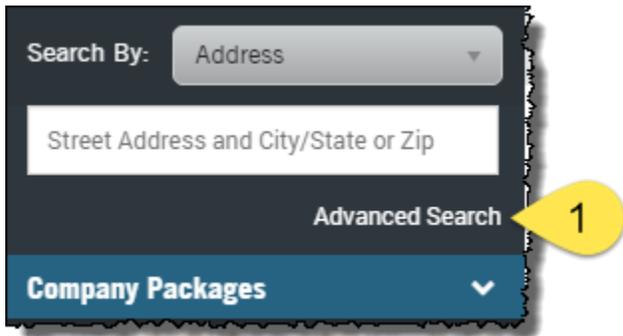
## Overview

TitleFlex has a comprehensive filter functionality that allows clients to create custom searches for mailing lists and farms. This guide will provide details on how each filter works as well as functionality tips within the advanced filters.

Basic navigation, general, and common information is at the beginning of this document. The document lists the individual groups and fields in the same order as in the filter panel.

## Getting Started

Access the filters through the Advanced Search link shown here:



## Basic Navigation and General Features:

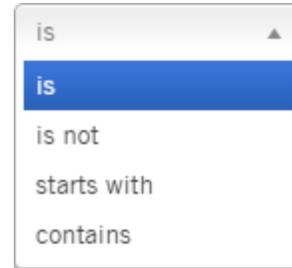
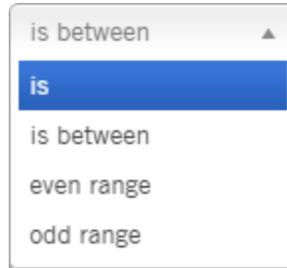
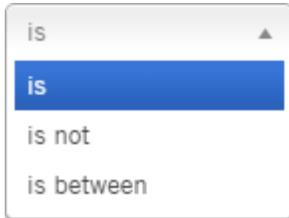
Below is a general key of the features and layout of the Advanced Search panel.

The screenshot shows the 'ADVANCED SEARCH' interface. Callout 1 points to the 'Jump to:' dropdown menu. Callout 2 points to the 'Create Custom Forms' button. Callout 3 points to the 'Clear All' button. Callout 4 points to the '0 results' counter and 'View Results'/'Get Count' buttons. Callout 5 points to the filter categories on the left. Callout 6 points to the 'Add to Search' button. Callout 7 points to the 'STATE & COUNTY BUNDLE' panel. Callout 8 points to the 'ADDRESS BUNDLE' panel. Callout 9 points to the 'Listing Status' dropdown. Callout 10 points to the 'Listing Price' dropdown.

- 1. Jump To:** Use to jump to a specific group of filters. You can also use the scroll bar to the right of the filters to scroll through the whole list.
- 2. Create Custom Forms and Form Drop Down List:** You can create and save custom forms by removing the filters that you do not use and retaining commonly used filters based upon your use cases.
- 3. Clear All:** Removes all entries in a filter.
- 4. Results counter, View Results and Get Count.** Results will display the number of records matching your current filter set. Get Count refreshes the counter. View Results pulls the list of records.
- 5. Filter Groups:** Shown both collapsed and open. Click the triangle next to the Group name to open or close the group.
- 6. Add to Search:** Certain areas of the filters function as a bundle (Address Bundle, State & County Bundle, etc). When entering information into these bundles, click Add to Search to add the information to the query.
- 7. Query Builder Panel:** Shows the currently selected filters and current record count. Note this example shows two bundles, the State and County bundle and the Address bundle.
- 8. Edit (pencil) and Delete (x):** Click on either option to edit or delete the bundle.

9. **Select All | Deselect All:** Certain fields will include the option to select every available entry (such as Counties, Mortgage Types, Listing Status, etc.).

10. **Filter Modifiers:** Many fields have a drop down list of filter options to allow for inclusion or exclusion of specific ranges of data. Shown below are a few of the examples; others will be discussed in the sections below.



A field with denoted with:  is a premium field. Additional charges will apply.

Finally, do not include punctuation, such as dollar signs, percent signs, or commas in fields.

## Filter Menu Functionality:

The filter fields fall into three general types:

Example:

Range:



A range filter interface for 'Year Built'. It consists of a text input field containing 'Year Built', a dropdown menu with 'is between' selected, two numeric input fields containing '1965' and '1975', and the word 'and' between them.

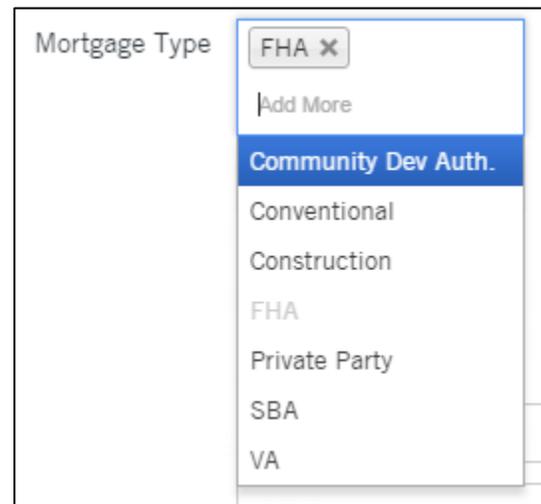
1. Operators with user defined entries

Single Entry:



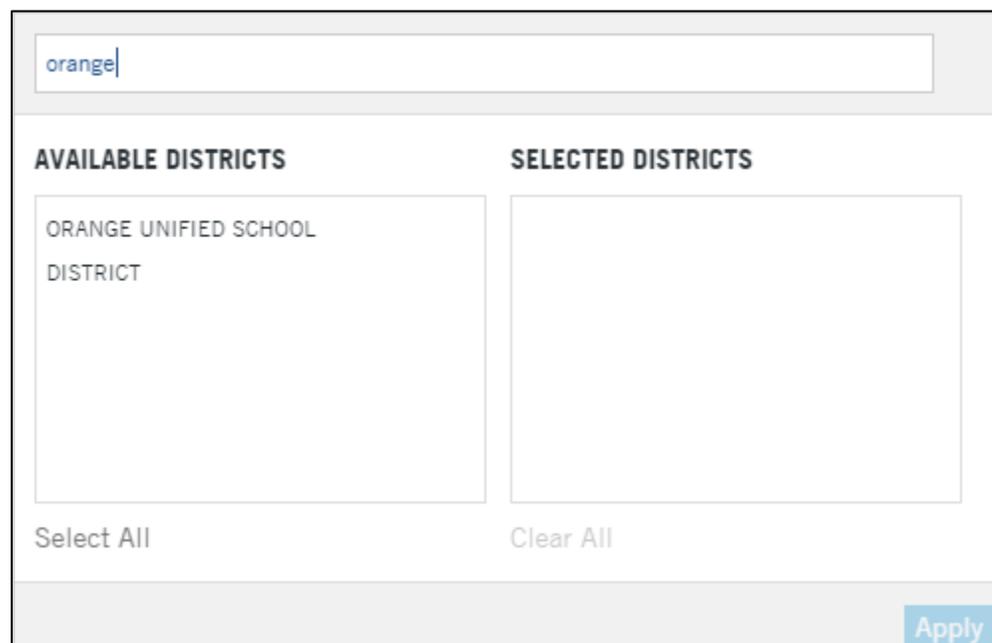
A single entry filter interface for 'Year Built'. It consists of a text input field containing 'Year Built', a dropdown menu with 'is' selected, and a numeric input field containing '1975'.

2. Drop Selection menus



A drop selection menu for 'Mortgage Type'. The menu is open, showing a list of options: 'FHA' (with a close button 'x'), 'Add More', 'Community Dev Auth.' (highlighted in blue), 'Conventional', 'Construction', 'FHA', 'Private Party', 'SBA', and 'VA'.

2. Search to Pick lists



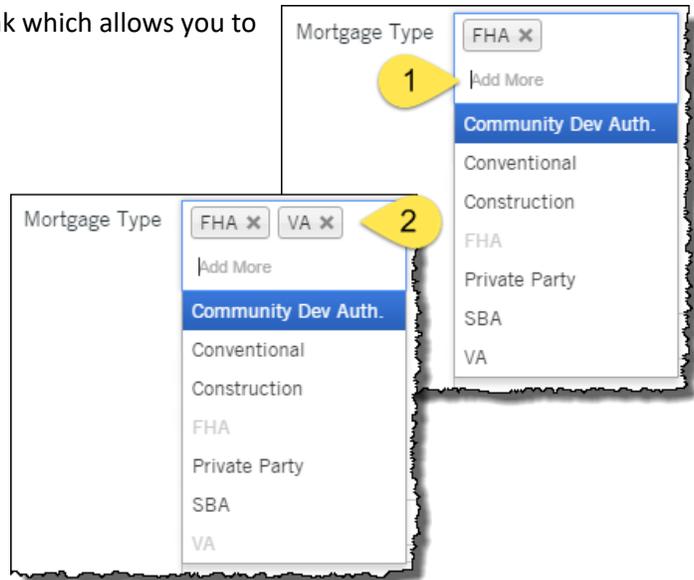
A search to pick lists interface. At the top is a search input field containing 'orange'. Below it are two columns: 'AVAILABLE DISTRICTS' and 'SELECTED DISTRICTS'. The 'AVAILABLE DISTRICTS' column contains a single entry: 'ORANGE UNIFIED SCHOOL DISTRICT'. Below this column is a 'Select All' button. The 'SELECTED DISTRICTS' column is empty. Below this column is a 'Clear All' button. At the bottom right is an 'Apply' button.

The second and third menu types have specific functionality reviewed below.

## Drop Selection Menus

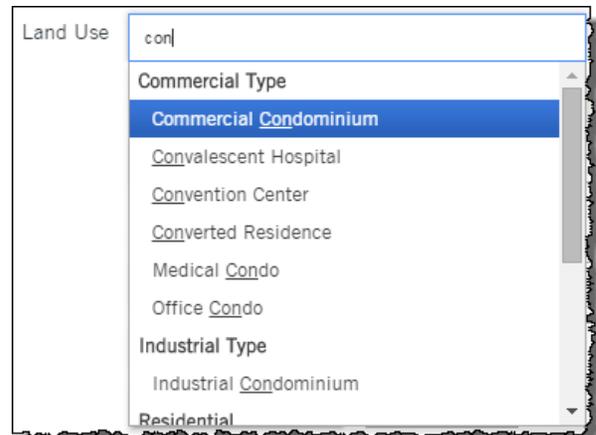
Drop Selection menus will include an “Add More” link which allows you to add multiple entries from the list into the filter.

In the example at right, this allows the selection of more than one mortgage type, not just a single entry, by clicking Add More. To remove a selection, click the “x”.



Additionally, these fields allow you to type directly into the field and the filter will search for matches as you type.

In this example, entering “con” in the Land Use field results in the following matches (underlined). Scroll down through the list to see additional suggestions.



## Search to Pick Lists

Search to Pick Lists allow for broader searches in fields with more diverse data. Examples where this filter is used include the Lender name, Title Company name, Subdivision, HOA name, etc.

The screenshot shows a 'Subdivision' filter interface. At the top left, the label 'Subdivision' is followed by an 'Add More' button. Below this is a search input field with the placeholder text 'Type to search'. The main area is divided into two columns: 'AVAILABLE SUBDIVISIONS' on the left and 'SELECTED SUBDIVISIONS' on the right. Both columns are currently empty. At the bottom of the 'AVAILABLE SUBDIVISIONS' column is a 'Select All' button, and at the bottom of the 'SELECTED SUBDIVISIONS' column is a 'Clear All' button. A blue 'Apply' button is located at the bottom right of the entire filter panel.

Enter the first few letters of the item (Subdivision, HOA, etc.) you are looking for (1) and the filter will provide matching entries (2). Click on an entry to move it to "Selected..." (3) and click Apply (4) when you are ready to add these to the query.

This screenshot shows the same 'Subdivision' filter interface as above, but with annotations. A yellow callout bubble with the number '1' points to the search input field, which now contains the text 'villa'. A second yellow callout bubble with the number '2' points to the 'AVAILABLE SUBDIVISIONS' list, which now contains several entries: '13796 CORTE VILLA CONDO', '16 CERRO VILLA HEIGHTS', '166 CERRO VILLA HEIGHTS', '789 SPANISH VILLAGE', '795/SAN CLEMENTE SPANISH VILLAGE', and 'VILLAGE'. A third yellow callout bubble with the number '3' points to the '16 CERRO VILLA HEIGHTS' entry in the 'AVAILABLE SUBDIVISIONS' list, which has been moved to the 'SELECTED SUBDIVISIONS' column. The 'SELECTED SUBDIVISIONS' column now contains '16 CERRO VILLA HEIGHTS' with a small 'x' icon to its right. A fourth yellow callout bubble with the number '4' points to the 'Apply' button at the bottom right.

## Working with Bundles:

Certain filters are grouped in Bundles. Bundles are sets of filters treated as a single unit. As an example: A farm requires 500-650 E Washington Street and another range of addresses on Firestone Drive. Bundles allow you to add and manage these two street number ranges and street names as discreet entries.

Bundles will remain in Edit mode, meaning you can continue to adjust the filters in that bundle, adding or removing options, as required. As you build the bundle, the filter will build the information in the query filter panel at right. When you have the first bundle ready, click Add to Search. This will complete the bundle and clear the selection area, allowing you add your next bundle.

Example: Figure 1, shows the Washington Avenue bundle in edit mode, allowing you to continue to add or modify the filter entries. When the information for this first bundle is complete, click Add to Search.

Figure 1:

The screenshot displays a web interface for building search filters. On the left, a panel titled 'LOCATION' contains an 'Address Bundle' in edit mode. The bundle includes the following filters: 'Street #' (is between 500 and 650), 'Pre Direction' (Add More), 'Street Name' (is Washington), 'Street Type' (Common Types: Avenue), and 'Post Direction' (Add More). A 'Unit #' filter is also present but empty. An 'Add to Search' button is at the bottom right of this panel. On the right, a 'STATE & COUNTY BUNDLE' shows 'State' as California and 'County' as Orange. Below it, a 'LOCATION' section contains an 'ADDRESS BUNDLE' with 'Street #' as 500 - 650, 'Street Name' as Washington, and 'Street Type' as Avenue.

Figure 2, shows the bundle after clicking Add to Search. The form has cleared and you can now add another bundle.

Figure 2:

The screenshot shows a web interface for filtering data. On the left, under the 'LOCATION' section, there is an 'Address Bundle' form with the following fields: 'Street #' (set to 'is between'), 'Pre Direction' (set to 'Add More'), 'Street Name' (set to 'is'), 'Street Type' (set to 'Add More'), 'Post Direction' (set to 'Add More'), and 'Unit #' (set to 'is between'). There are 'Select all' and 'Deselect all' links for the Pre and Post Direction fields. An 'Add to Search' button is at the bottom right of this section. On the right, there are two summary panels. The top one is 'STATE & COUNTY BUNDLE' with 'State' set to 'California' and 'County' set to 'Orange'. The bottom one is 'LOCATION' with an 'ADDRESS BUNDLE' containing 'Street #' (500 - 650), 'Street Name' (Washington), and 'Street Type' (Avenue).

Figure 3 shows the entry of the next address bundle. Again, note that the address information is still editable. Click Add to Search when the Firestone Drive bundle is complete.

Figure 3

The screenshot shows the same web interface as Figure 2, but with the 'Address Bundle' form populated. The 'Street #' field is now '200 and 700', 'Street Name' is 'Firestone', and 'Street Type' is 'Common Types : Drive'. The 'Add More' button for 'Street Type' is highlighted. Below the 'Address Bundle' form, there are 'City' and 'ZIP Code' fields, both set to 'is'. The 'STATE & COUNTY BUNDLE' panel remains the same. The 'LOCATION' summary panel now contains two 'ADDRESS BUNDLE' entries: the first one is identical to the one in Figure 2, and the second one has 'Street #' (200 - 700), 'Street Name' (Firestone), and 'Street Type' (Drive).

Figure 4 shows the final set of address bundles after click Add to Search.

Figure 4

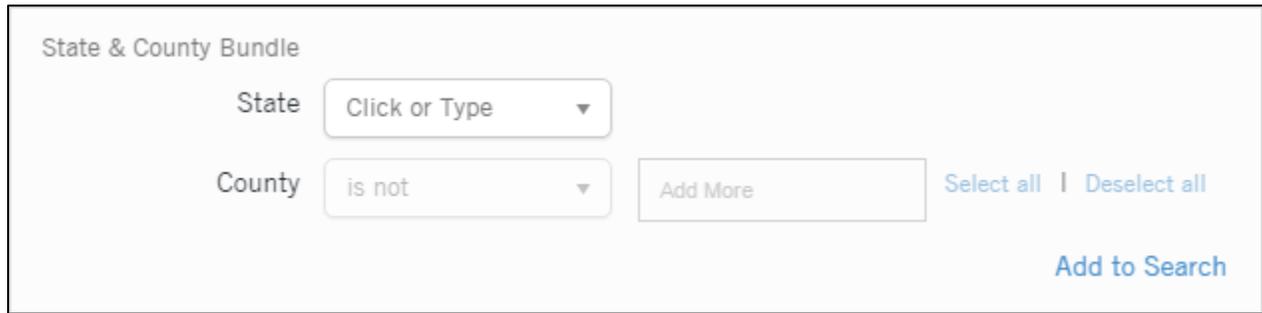
The screenshot displays a search interface for address bundles. On the left, under the 'LOCATION' section, there are several filter categories: 'Address Bundle' (with a video icon), 'Street #' (is between), 'Pre Direction' (Add More, Select all, Deselect all), 'Street Name' (is), 'Street Type' (Add More, Select all, Deselect all), 'Post Direction' (Add More, Select all, Deselect all), and 'Unit #' (is between). Below these are 'City', 'ZIP Code', and 'APN' filters, each with an 'is' dropdown and a plus sign. An 'Add to Search' button is located at the bottom right of the filter section. On the right side, the results are shown in a list. The first result is a 'STATE & COUNTY BUNDLE' with 'State' set to 'California' and 'County' set to 'not Contra Costa'. Below it are two 'ADDRESS BUNDLE' entries. The first 'ADDRESS BUNDLE' has 'Street #' '500 - 650', 'Street Name' 'Washington', and 'Street Type' 'Avenue'. The second 'ADDRESS BUNDLE' has 'Street #' '200 - 700', 'Street Name' 'Firestone', and 'Street Type' 'Drive'. Each bundle entry has edit (pencil) and delete (x) icons.

Edit or remove a completed bundle by clicking on the pencil or “x”, respectively.



## State and County Bundle

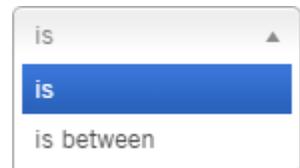
This is a stand-alone bundle at the top of the list.



The screenshot shows a filter bundle titled "State & County Bundle". It contains two dropdown menus: "State" with the text "Click or Type" and a downward arrow, and "County" with the text "is not" and a downward arrow. To the right of the "County" dropdown is a button labeled "Add More". Further right are two links: "Select all" and "Deselect all", separated by a vertical bar. At the bottom right of the bundle is a blue button labeled "Add to Search".

**State:** A drop select field. All 50 states plus the District of Columbia. Nationwide option is also included.

**County:** A drop select field. Will display the counties for the state selected. Uses the IS/IS NOT operator.



The screenshot shows a dropdown menu for the County field. The menu is open, displaying three options: "is", "is", and "is between". The first "is" option is highlighted with a blue background.

# Location Filters

## Address Bundle

▼ LOCATION

Address Bundle 

Street #  and

Pre Direction  [Select all](#) | [Deselect all](#)

Street Name

Street Type  [Select all](#) | [Deselect all](#)

Post Direction  [Select all](#) | [Deselect all](#)

Unit #

[Add to Search](#)

### Field (in form order):

**Street Number:** Includes the operators for single numbers, ranges and odd/even ranges.

**Pre Direction and Post Direction:** A drop down list selection for all compass points (N, NE, E, SE, etc).

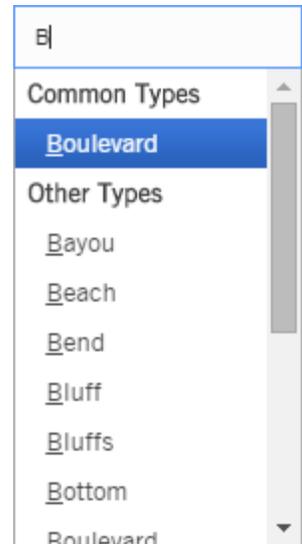
**Street Name:** Do not include pre- or post-directionals.

### Additional Information:

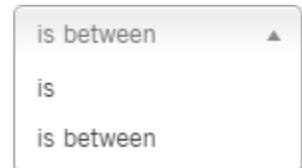
- is between ▲
- is
- is between
- even range
- odd range

- is ▲
- is**
- is not
- starts with
- contains

**Street Type:** Drop down selection list of street types, such as Avenue, Boulevard, Court, etc. The list is text sensitive. Enter the first letter or letters of the type you are looking for and the list will attempt to suggest options.



**Unit #:** Uses an exact match (Is) and a range match (Is Between).



## Location (Continued)

City	is	<input type="text"/>	+
ZIP Code	is	<input type="text"/>	+
APN	is	<input type="text"/>	+
Tax Area	is	<input type="text"/>	+
Subdivision	Please select a single county		
Neighborhood Code	Please select a single county		+
HOA Name	Please select a single county		
School District	Please select a single county		
Carrier Route	<input type="text"/>		+

Tract Block Lot Bundle

Tract	is	Please select a single county
Block	is	Please select a single county
Lot	is	Please select a single county

[Add to Search](#)

### Field (in form order):

**City:** Text entry only; operators will allow for partial matches.

**Zip Code:** Numeric entry; operators will allow for ranges and exclusions.

### Additional Information:

is ▲

**is**

is not

starts with

contains

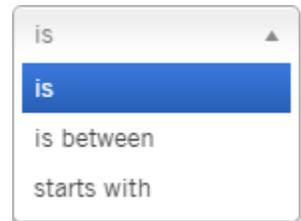
is ▲

**is**

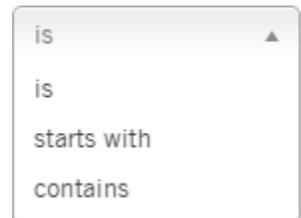
is not

is between

**APN:** Text and numeric entry; the APN can be formatted or unformatted and the field will search the alternate APNs.

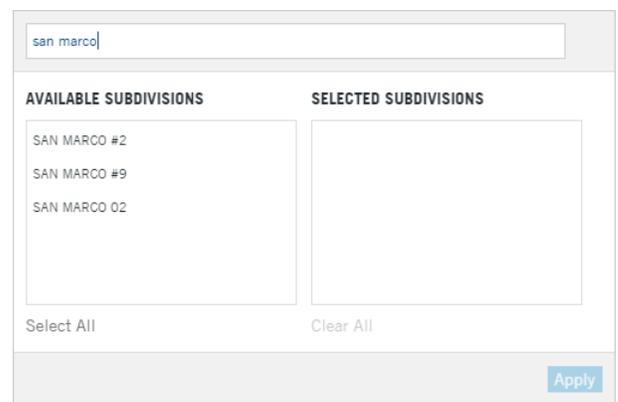


**Tax Area:** Text and numeric entry.



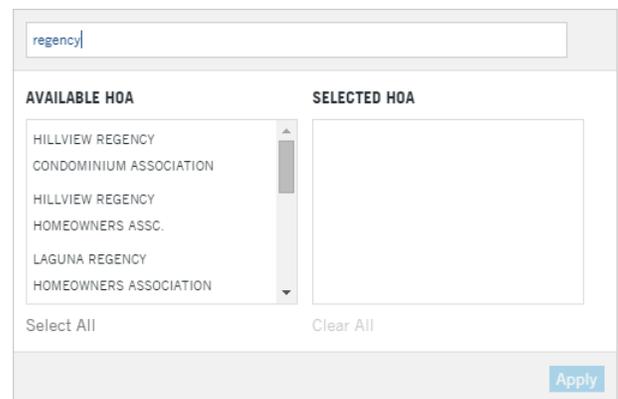
**Subdivision:** Search to pick list. Requires a State and County selection.

NOTE: Not all counties populate the subdivision field.



**Neighborhood Code:** No drop down list; primarily for King County, WA. Accepts numeric values.

**HOA Name:** Search to pick list. Requires a State and County selection.



**School District:** Search to pick list. Requires a State and County selection.

orange

**AVAILABLE DISTRICTS**

ORANGE UNIFIED SCHOOL DISTRICT

Select All

**SELECTED DISTRICTS**

Clear All

Apply

**Carrier Route:** Enter the post office carrier route.

**Tract, Block, Lot:** Text and numeric field. This is a bundle field. Click Add to Search to add additional bundles.

## Characteristics Filters

**▼ CHARACTERISTICS**

Land Use  [Select all](#) | [Deselect all](#)

County Land Use

Zoning Code  ▼  and  +

Site Influence  [Select all](#) | [Deselect all](#)

Year Built  ▼  and

Living Area (Sq. Ft.)  ▼  and

Bedrooms  ▼  and

Bathrooms  ▼  and

Total Rooms  ▼  and

Lot Area  ▼  and

Lot Acreage  ▼  and

Stories  ▼  and

Pool  ▼

Garage Spaces  ▼  and

# of Units  ▼  and

NOTE: Where provided, all filters use the Is / Is Between modifier.

Year Built  ▼

- ▲
- 
-

**Field (In form order);**

**Land Use:** Drop-selection of choices from Agriculture Types to Vacant Land Types. Each Type selection contains subgroups in a cascading menu.

**County Land Use:** Numeric value input in the assessment of property for tax purposes.

**Zone Code** takes numeric and alpha values.

**TIP:** Zone codes are county specific. Check the Property Detail Report in the Site Information Section, Zoning field for examples.

**Site Influence** Is a drop selection. Each selection has more types in a cascade menu.

**TIP:** The data in the Site Influence field is from County Assessor’s records. To verify how a county is coding the Site Influence field, pull a property detail report for a parcel and check the Site Influence field in the Site Information section of the report.

**Year Built:** Four character numeric field.

**Living Area (SQFT):** Numeric value input. This value is in the Property Characteristics section of the Property Detail report.

**Additional Information:**

RES|

Commercial Type

Converted Residence

Office & Residential

Restaurant Building

Restaurant Drive In

Stores & Residential

Residential

Cabin

Condominium

Cooperative

10|

AVAILABLE USE CODES

103-RELIGIOUS

104-RESEARCH & DEVELOPMENT

105-RESIDENTIAL

110-RESTAURANT

Select All

SELECTED USE CODES

Clear All

Apply

water|

Lot Location

ISLAND NO WATERFRONT

View

INLAND WATERWAY

INTERCOASTAL WATERWAY

WATER

WATER VIEW

Water

BAY

BAY ACCESS

**Bedrooms, Bathrooms, Total Rooms:** All take numeric input values that can also be done as a range search

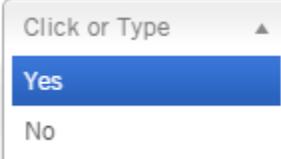
**Lot Area:** A numeric value.

**Lot Acreage:** Takes a numeric value. Values can be in decimal form.

**Stories:** Takes a numeric value.

**Garage Spaces:** Takes a numeric value.

**Pool:** Drop-selection between Yes and No; leave blank if you have no preference.



A drop-down menu with a light gray background and a thin border. At the top, it says "Click or Type" with a small upward-pointing triangle to its right. Below this, there are two options: "Yes" and "No". The "Yes" option is highlighted with a blue background, while "No" has a white background. The text is in a simple, sans-serif font.

**# of Units:** Takes a numeric value.

## Owner

▼ OWNER

Owner Last Name   +

Owner First Name   +

Owners (All)   +

Owner Ethnicity  [Select all](#) | [Deselect all](#)

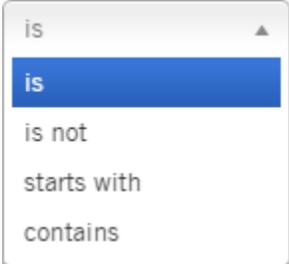
Exemption  [Select all](#) | [Deselect all](#)

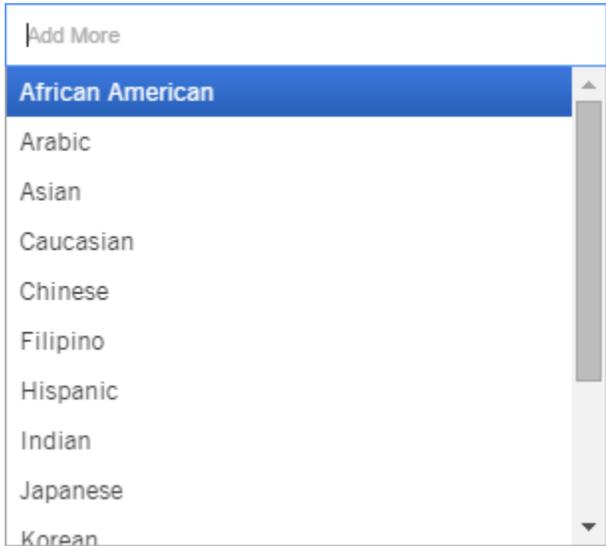
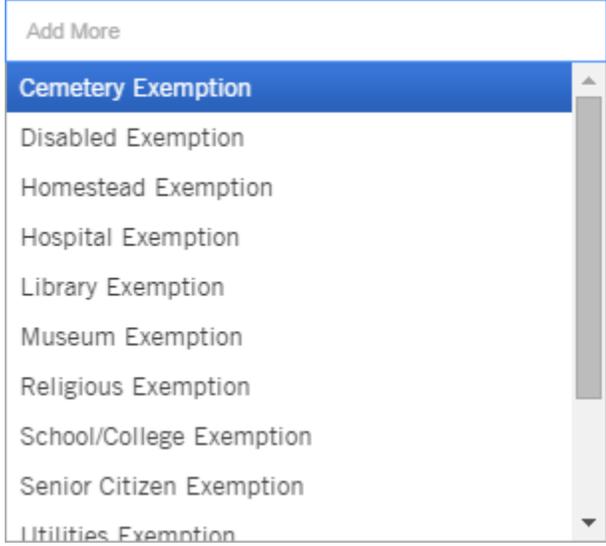
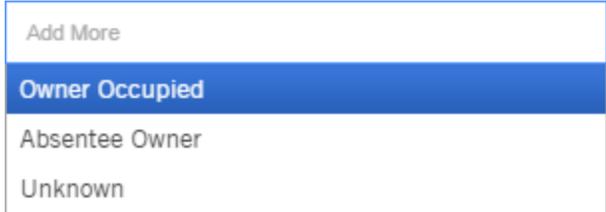
Owner Occupied  [Select all](#) | [Deselect all](#)

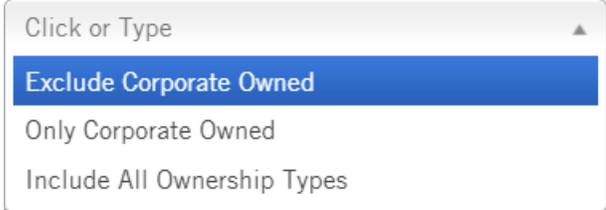
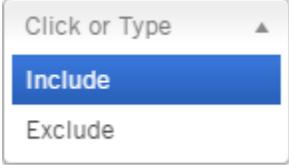
 Properties Owned   and

Corporate Owned

Do Not Mail

Fields (in form order)	Additional Notes:
<p><b>Owner Last Name, Owner First Name and Owner (Other):</b> Alpha characters.</p>	

<p><b>Owner Ethnicity:</b> Drop-selection of 14 ethnic types.</p>	
<p><b>Exemption</b> is a drop-selection of 13 exemption types.</p>	
<p><b>Owner Occupied:</b> Drop select field. Leave blank to include Owner Occupied, Absentee and Unknown occupancy.</p>	
<p><b>Properties Owned:</b> Specific number or range.</p>	<p>Enter the number of properties or the range of properties to search for. Designed to create mailing lists for individuals that own more than one property.</p>

<p><b>Corporate Owned:</b> Drop selection field.</p>	 <p>A dropdown menu with a light gray header containing the text "Click or Type" and a small upward-pointing triangle. Below the header, three options are listed: "Exclude Corporate Owned" (highlighted in blue), "Only Corporate Owned", and "Include All Ownership Types".</p>
<p><b>Do Not Mail:</b> Drop-selection; leave blank to include all records regardless of Do Not Mail flag.</p>	 <p>A dropdown menu with a light gray header containing the text "Click or Type" and a small upward-pointing triangle. Below the header, two options are listed: "Include" (highlighted in blue) and "Exclude".</p>

## Owner – Mailing State and County Bundle

Mailing State & County Bundle

Mailing State

Mailing County   [Select all](#) | [Deselect all](#)

[Add to Search](#)

**Fields (in form order)**

**Mailing State:** Drop-selection of States.

**Mailing County:** Drop-selection of available counties. Select the State to activate this field.

**Additional Notes:**

## Owner – Mailing Address Bundle

Functionality and field definition is the same as the Address Bundle describe above. The only difference is that these fields filter against the mailing addresses.

Mailing Address Bundle

Mailing Street #  and

Mailing Pre Direction  [Select all](#) | [Deselect all](#)

Mailing Street Name

Mailing Street Type  [Select all](#) | [Deselect all](#)

Mailing Post Direction  [Select all](#) | [Deselect all](#)

Mailing Unit #

[Add to Search](#)

### Field (in form order):

**Mailing Street #:** Includes the operators for single numbers, ranges and odd/even ranges.

**Mailing Pre Direction and Mailing Post Direction:** A drop selection for all compass points (N, NE, E, SE, etc).

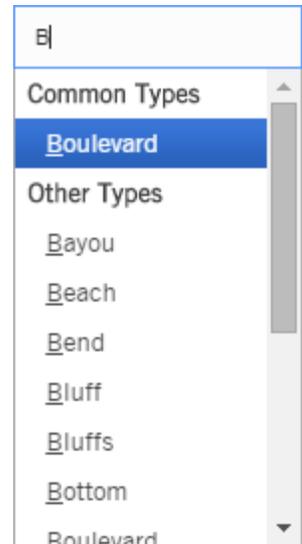
**Mailing Street Name:** Do not include pre- or post-directionals in this field.

### Additional Information:

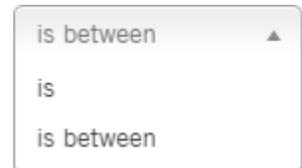
▲  
is  
is between  
even range  
odd range

▲  
is  
**is**  
is not  
starts with  
contains

**Mailing Street Type:** Drop select list of street types, such as Avenue, Boulevard, Court, etc.



**Mailing Unit #:** Numeric input field.



### Owner – Mailing City and Zip Code

These two fields are separated from the Mailing Address Bundle should you wish to filter only by mailing city or zip code.

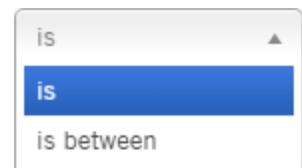
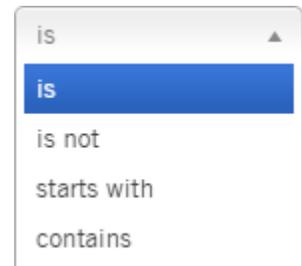
Mailing City	is	<input type="text"/>	+
Mailing ZIP Code	is	<input type="text"/>	+

**Field (in form order):**

**City:** Text entry only.

**Zip Code:** Numeric entry.

**Additional Information:**



## Owner – International Mailing Bundle

International Mailing Bundle

Mailing Country  [Select all](#) | [Deselect all](#)

Canadian Mailing Province   [Select all](#) | [Deselect all](#)

Canadian Mailing City

Canadian Mailing Postal Code

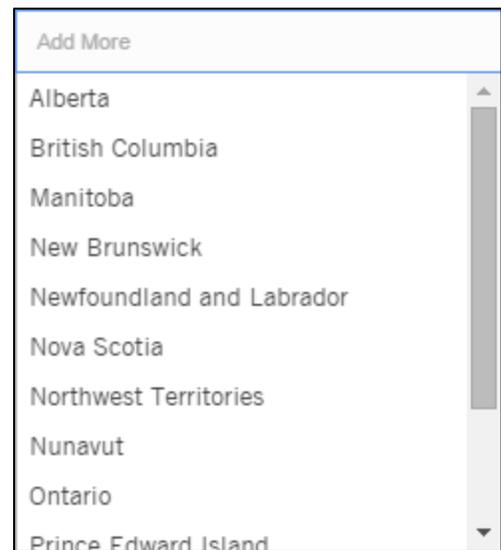
[Add to Search](#)

### Field (in form order)

**Mailing Country:** A drop select of countries. In order to use the Canadian address, make sure to select “Canada”. Not all records have complete mailing addresses for other countries.

### Additional Information:

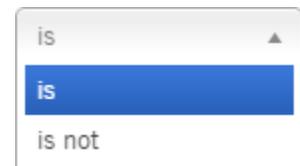
**Canadian Mailing Provinces:** Drop select list.



**Canadian Mailing City:** Enter the city name.

**Canadian Mailing Postal Code:** Enter the postal code

**Note:** All three Canadian Mailing fields Is/Is Not filter modifier.



## Sale Information:

▼ **SALE INFORMATION**

Transaction Type

Sale Price  and

Sale Price Type  [Select all](#) | [Deselect all](#)

Last Sale Date  and

Last Sale Recording Date  and

Recording Month

Seller Name   +

Transaction Deed Type  [Select all](#) | [Deselect all](#)

### Field (in form order)

**Transaction Type:** Drop selection.

- Sale (Arms-Length): Full value transfer between unrelated parties.
- Ownership Transfer (Non-Arms Length): Vesting changes, such as a quit claim deed or interspousal transfer.
- Latest Transaction: Any of the above.

**Sales Price:** Numeric value input.

### Additional Information

Click or Type ▲

Sale (Arms-length)

Ownership Transfer (Non-arms-length)

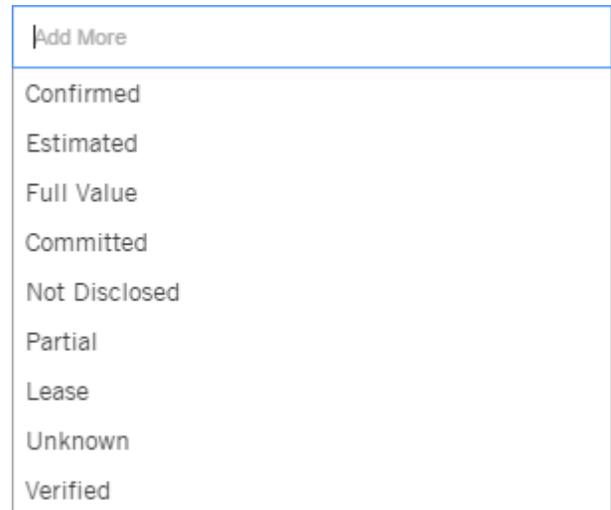
Latest Transaction

is ▲

is

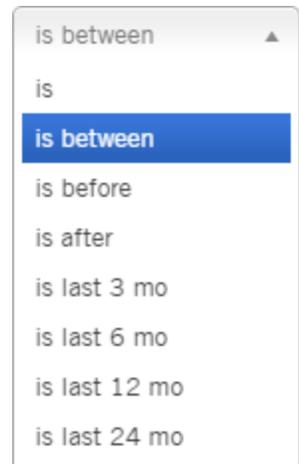
is between

**Sales Price Type:** A drop-selection of various sales price types from Confirmed to Verified.



A dropdown menu with a white background and a blue border. The top item is "Add More" in a smaller font. Below it are the following options: Confirmed, Estimated, Full Value, Committed, Not Disclosed, Partial, Lease, Unknown, and Verified.

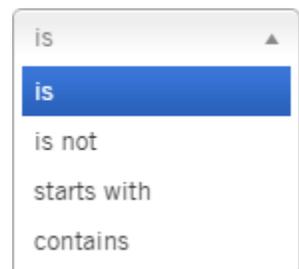
**Last Sale Date and Last Sale Recording Date:** Drop-selections for the Last 3, 6, 12 and 24 Months. Custom dates are allowed.



A dropdown menu with a white background and a blue border. The top item is "is between" with a small upward-pointing triangle. Below it are the following options: is, is between (highlighted in blue), is before, is after, is last 3 mo, is last 6 mo, is last 12 mo, and is last 24 mo.

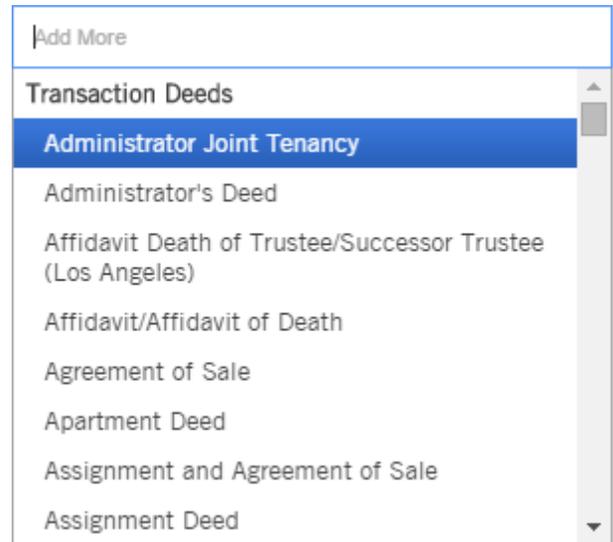
**Recording Month:** Drop-selection of any one of twelve months.

**Seller Name:** Enter the last name of the seller. Include, exclude, starts with and contains for broader search options.



A dropdown menu with a white background and a blue border. The top item is "is" with a small upward-pointing triangle. Below it are the following options: is (highlighted in blue), is not, starts with, and contains.

**Transaction Deed Type:** Drop-selection from Deed, Quitclaim, Trust Deed/Mortgage, Foreclosure, and many others.



A screenshot of a web application's drop-down menu. The menu is titled "Transaction Deeds" and is currently open, showing a list of deed types. The first item, "Administrator Joint Tenancy", is highlighted in blue. Below it are "Administrator's Deed", "Affidavit Death of Trustee/Successor Trustee (Los Angeles)", "Affidavit/Affidavit of Death", "Agreement of Sale", "Apartment Deed", "Assignment and Agreement of Sale", and "Assignment Deed". At the top of the menu, there is a link that says "Add More". The menu has a scroll bar on the right side.

- Add More
- Transaction Deeds
- Administrator Joint Tenancy
- Administrator's Deed
- Affidavit Death of Trustee/Successor Trustee (Los Angeles)
- Affidavit/Affidavit of Death
- Agreement of Sale
- Apartment Deed
- Assignment and Agreement of Sale
- Assignment Deed

## Financing Information

**▼ FINANCING INFORMATION**

Mortgage Amount  and

Mortgage Recording Date  and

Mortgage Type  [Select all](#) | [Deselect all](#)

Seller Carryback

Interest Rate  and

Financing Deed Type  [Select all](#) | [Deselect all](#)

Interest Rate Type  [Select all](#) | [Deselect all](#)

Original Lender Name

Title Company

### Fields (in form order)

**Mortgage Amount:** Takes a numeric input value.

**TIP:** This is the mortgage origination amount, as specified on the origination document. Current balances are not available in DataTree.

**Mortgage Recording Date:** Drop-selection from Last 3, 6, 12 and 24 Months. You can insert custom dates.

### Additional Information:

is ▲

is

is between

is between ▲

is

is between

is before

is after

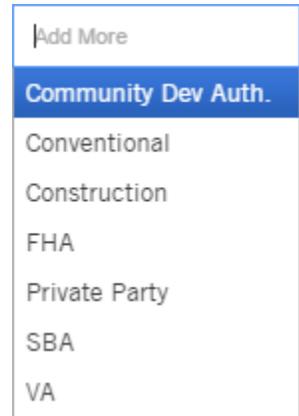
is last 3 mo

is last 6 mo

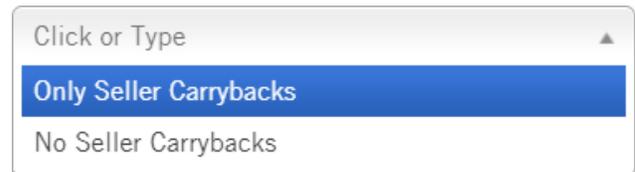
is last 12 mo

is last 24 mo

**Mortgage Type:** Drop-selection of seven mortgage types.

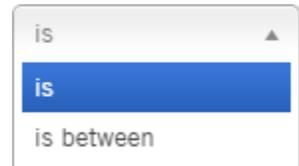


**Seller Carryback:** Drop selection.

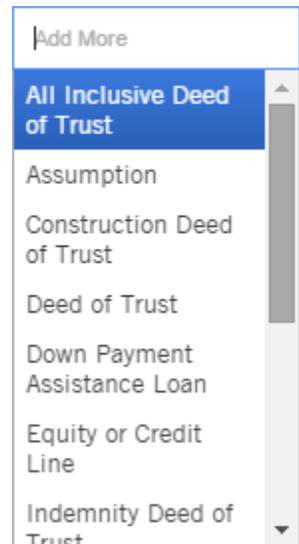


**Interest Rate:** Numeric input value.

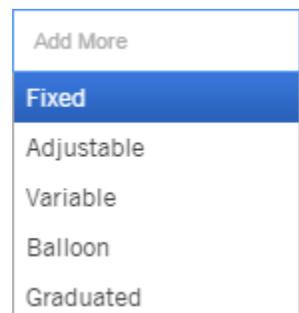
**TIP:** Interest rates are only available on properties with Adjustable Rate mortgages.



**Financing Deed Type:** Selections for the type of deed used. Includes options such as Construction Deeds, Loan Modifications, Deeds of Trust, Mortgages, Revolving Line of Credit, etc.



**Interest Rate Type:** Drop-selection of five interest types from Fixed to Graduated.



**Original Lender Name:** Search to pick list.

wells fargo

AVAILABLE LENDERS	SELECTED LENDERS
WELLS FARGO BANK NA	
WELLS FARGO #2005-CIBC11 (CE)	
WELLS FARGO #2006-CIBC16 (CE)	
WELLS FARGO #2007-CIBC18	

Select All Clear All

Apply

**Title Company:** Search to pick list.

new world

AVAILABLE TITLE COMPANIES	SELECTED TITLE COMPANIES
NEW WORLD	
NEW WORLD ABSTRACT	
NEW WORLD ABSTRACT CO	
NEW WORLD TITLE	
NEW WORLD TITLE & ESCROW	

Select All Clear All

Apply

## Finance Scores

Propensity score measuring the likelihood of a homeowner to seek a purchase or refinance mortgage.

FINANCE SCORES ?		
\$ Purchase Intel Score	Add More	Select all   Deselect all
\$ Refi Intel Score Conventional	Add More	Select all   Deselect all
\$ Refi Intel Score FHA	Add More	Select all   Deselect all
\$ Refi Intel Score Cash-out	Add More	Select all   Deselect all
\$ Equity Intel Score	Add More	Select all   Deselect all

### Field

Purchase Intel Score  
Refi Intel Score Conventional  
Refi Intel Score FHA  
Refi Intel Score Cash-out  
Equity Intel Score

Likelihood is within three to six months.

### Additional Information

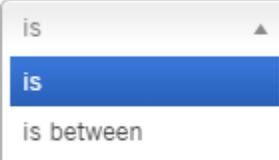
Add More
<b>Very High Likelihood</b>
High Likelihood
Above Average Likelihood

## Assessor Values

**NOTE:** The various County Assessor's offices provide the Assessed, Market and Appraised values. Counties do not necessarily populate each category. Check the Property Detail Report > Tax Information section to see if the selected county provides this information.

▼ ASSESSOR VALUES			
Assessed Total Value	is between ▼	<input type="text"/>	and <input type="text"/>
Assessed Land Value	is between ▼	<input type="text"/>	and <input type="text"/>
Assessed Improvement Value	is between ▼	<input type="text"/>	and <input type="text"/>
Assessed Improvement %	is between ▼	<input type="text"/>	and <input type="text"/>
Market Total Value	is between ▼	<input type="text"/>	and <input type="text"/>
Market Land Value	is between ▼	<input type="text"/>	and <input type="text"/>
Market Improvement Value	is between ▼	<input type="text"/>	and <input type="text"/>
Market Improvement %	is between ▼	<input type="text"/>	and <input type="text"/>
Appraised Total Value	is between ▼	<input type="text"/>	and <input type="text"/>
Appraised Land Value	is between ▼	<input type="text"/>	and <input type="text"/>
Appraised Improvement Value	is between ▼	<input type="text"/>	and <input type="text"/>
Appraised Improvement %	is between ▼	<input type="text"/>	and <input type="text"/>

All fields in the Values group use the Is/Is Between modifier.



A dropdown menu with a light gray background and a blue highlight on the selected item. The selected item is 'is', and the visible option below it is 'is between'. A small upward-pointing triangle is visible in the top right corner of the dropdown.

Values follow the same definitions:

### Fields (in form order):

**Total Value:** This is simply the sum of the Land Value and Improvement Value; numeric input value; can be done as a range search

**Land Value:** Value of the land only; numeric input value.

**Improvement Value:** Improvements to the property; numeric input value.

**Improvement %:** The improvement value expressed as a percentage; numeric input value.

## Equity

▼ EQUITY

Equity Value  and

Equity %  and

### Field (in form order)

### Additional Information

**Equity Value and Equity %:** Range or specific value using the Is/Is Between operators.

is ▲

is

is between

**Equity Value:** An internally derived estimated dollar value based upon the Estimated Current Value minus the sum of the origination amount of all open liens. Numeric input value.

**Equity %:** The Equity Value expressed as a percentage. Numeric input value.

**TIP:** It is easier to search for homeowners who have “70% - 100%” equity percent than by searching using a dollar range. Stated differently, is “\$500,000 to \$1,000,000” in Equity Value the same as 70% - 100% equity?

**NOTE:** Equity Value and Equity Percentage can be negative. To search for properties with negative equity use the following pattern for your range. The entry must be ascending order.

Equity Value   and

Equity %   and

## Market Value

▼ MARKET VALUE

Estimated Value  and

### Field (in form order)

**Estimated Value:** Enter the value or value range. Uses the Is/Is Between operator.

### Additional Information

The field uses the data from the First American AVM

## Listing Information

▼ LISTING INFORMATION

Listing Status  [Select all](#) | [Deselect all](#)

Listing Date  and

Listing Price  and

### Field (in form order)

**Listing Status:** Drop-selection of choices from Active, Pending, and Contingent.

**Listing Date:** Drop-selection from Last 3, 6, 12 and 24 Months plus option for specific date and custom date ranges.

**Listing Price:** Takes a numeric input value.

### Additional Information

Add More

Active

Pending

Contingent

is between ▲

is

**is between**

is before

is after

is last 3 mo

is last 6 mo

is last 12 mo

is last 24 mo

is ▲

**is**

is between

## Foreclosure Information

Note: Foreclosures are setup as a bundle. See the Working with Bundles section at the beginning of this document for more information.

**▼ FORECLOSURE INFORMATION**

Foreclosure Bundle

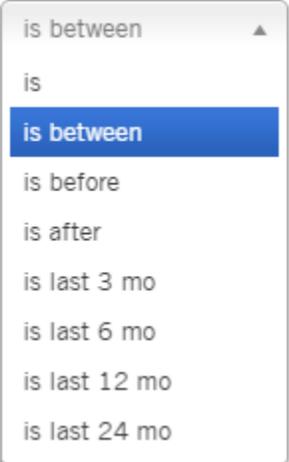
Foreclosure Status

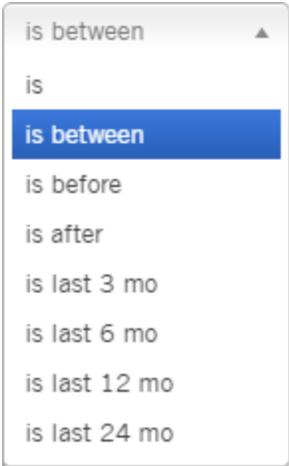
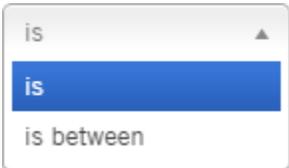
Foreclosure Recorded Date   and

Foreclosure Event Date   and

Foreclosure Amount   and

[Add to Search](#)

Fields (in form order)	Additional Information:
<p><b>Foreclosure Status:</b> Drop-selection of choices: Default, Auction, REO, REO Sale and Short Sale. This is a mandatory field; Date, Event, and Amount fields will not activate otherwise.</p> <p>The Dates and Amount filters below, will affect the selected Foreclosure status.</p>	<p><b>Default:</b> The homeowner has failed to pay their mortgage for a certain period of time.</p> <p><b>Auction:</b> The property is scheduled to be sold at auction to recover the outstanding balance.</p> <p><b>REO:</b> The property was not sold at auction and has returned to the lien holder. The lien holder now holds title to the property.</p> <p><b>REO Sale:</b> The last market sale was from the lienholder to a private individual.</p> <p><b>Short Sale:</b> Describes the sale of a property where the sale amount is less than the origination amounts of the open liens.</p>
<p><b>Foreclosure Recorded Date:</b> The recording date of the selected foreclosure status.</p>	

<p><b>Foreclosure Event Date:</b> The date a foreclosure activity occurred. This field is dependent upon the Foreclosure Type selected. For example, if you select “Auction” you can then select a date range looking forward to when the auction is scheduled. If you were to select REO Sales, then you would use this field to search for the actual sales date, not the recording date.</p>	
<p><b>Foreclosure Amount:</b> Numeric input value.</p>	

## HOA Lien

▼ HOA LIEN

\$
Open HOA Lien Present
Click or Type ▼

Fields (in form order)	Additional Information:
<p><b>Open HOA Lien Present:</b></p>	<p>Yes/No field to include or exclude properties with an open HOA Lien. Leave blank for all records regardless of the presence of an HOA Lien.</p>