



TitleFlex
by Data Trace

FILTER CATALOG FOR FARMING

Rev. 201801

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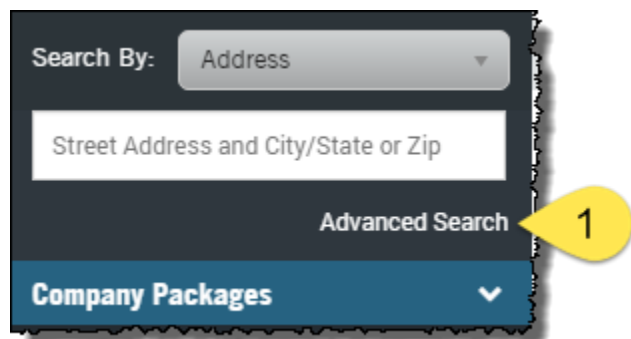
Overview

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:

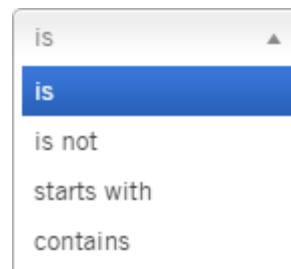
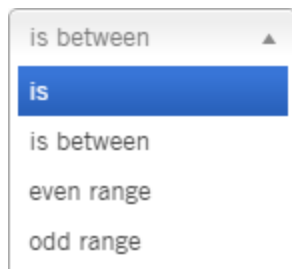
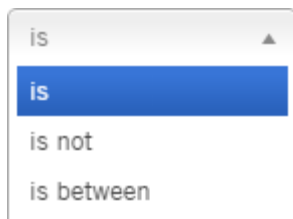
Below is a general key of the features and layout of the Advanced Search panel.

The screenshot shows the 'ADVANCED SEARCH' interface. Callout 1 points to the 'Jump to:' dropdown menu which is open, showing options like 'Top', 'State & Location', 'Characteristics', etc. Callout 2 points to the 'Create Custom Forms' link. 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 left sidebar with filter categories like 'LOCATION', 'CHARACTERISTICS', 'SALE INFORMATION', etc. 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' range input fields.

- 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:

1. Operators with user defined entries

Range:

A range filter interface for 'Year Built'. It consists of a text box containing 'Year Built', a dropdown menu showing 'is between', two input boxes containing '1965' and '1975', and the word 'and' between them.

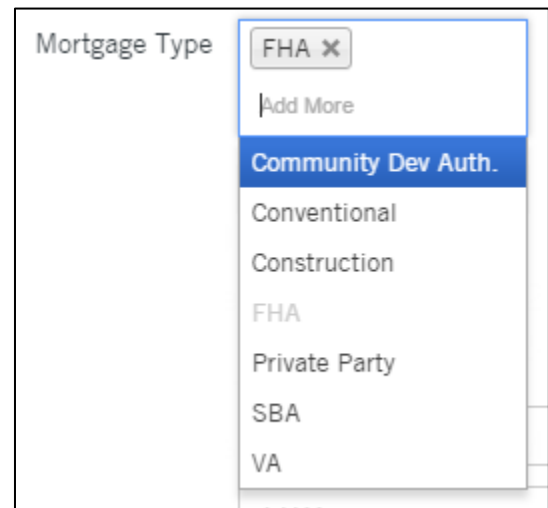
Year Built is between 1965 and 1975

Single Entry:

A single entry filter interface for 'Year Built'. It consists of a text box containing 'Year Built', a dropdown menu showing 'is', and an input box containing '1975'.

Year Built is 1975

2. Drop Selection menus

A drop selection menu for 'Mortgage Type'. The label 'Mortgage Type' is on the left. On the right, there is a button 'FHA x' and a dropdown menu. The dropdown menu is open, showing 'Add More' at the top, followed by 'Community Dev Auth.' (highlighted in blue), 'Conventional', 'Construction', 'FHA', 'Private Party', 'SBA', and 'VA'.

Mortgage Type

FHA x

Add More

Community Dev Auth.

Conventional

Construction

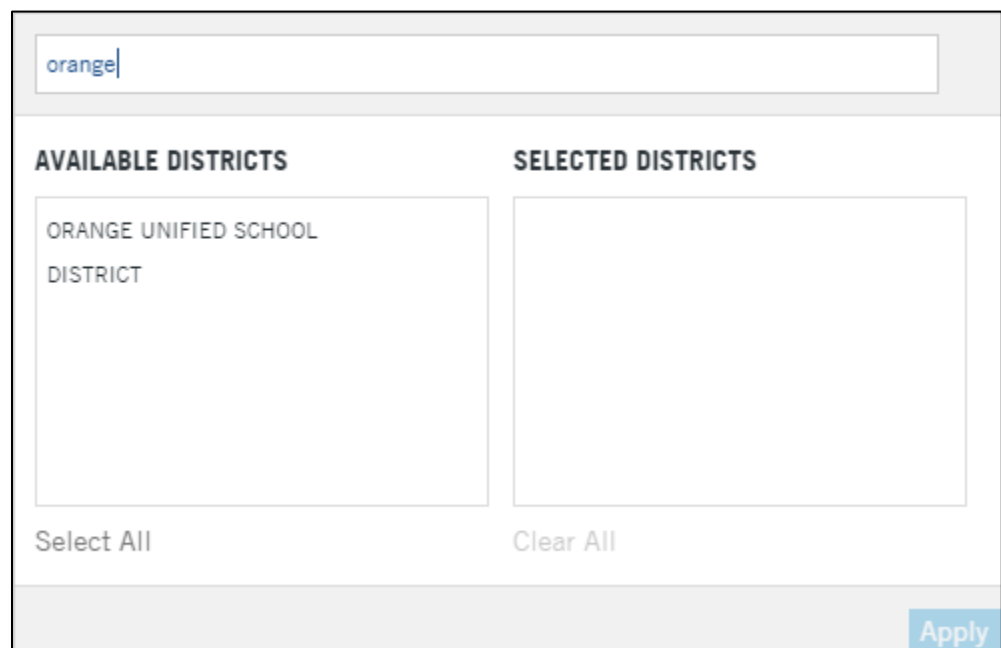
FHA

Private Party

SBA

VA

2. Search to Pick lists

A search to pick lists interface. At the top is a search bar containing 'orange'. Below it are two columns: 'AVAILABLE DISTRICTS' and 'SELECTED DISTRICTS'. The 'AVAILABLE DISTRICTS' column contains a box with the text 'ORANGE UNIFIED SCHOOL DISTRICT'. The 'SELECTED DISTRICTS' column is empty. At the bottom of the 'AVAILABLE DISTRICTS' column is a 'Select All' button. At the bottom of the 'SELECTED DISTRICTS' column is a 'Clear All' button. At the bottom right of the entire interface is an 'Apply' button.

orange

AVAILABLE DISTRICTS

SELECTED DISTRICTS

ORANGE UNIFIED SCHOOL DISTRICT

Select All

Clear All

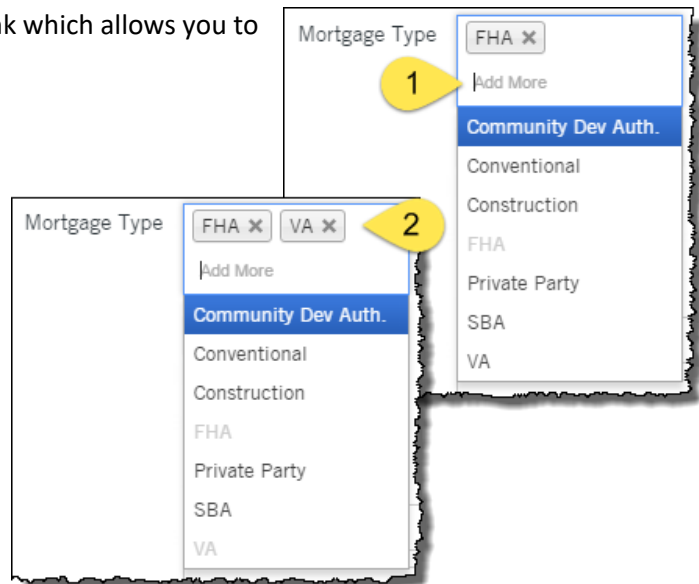
Apply

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

Drop Selection Menus

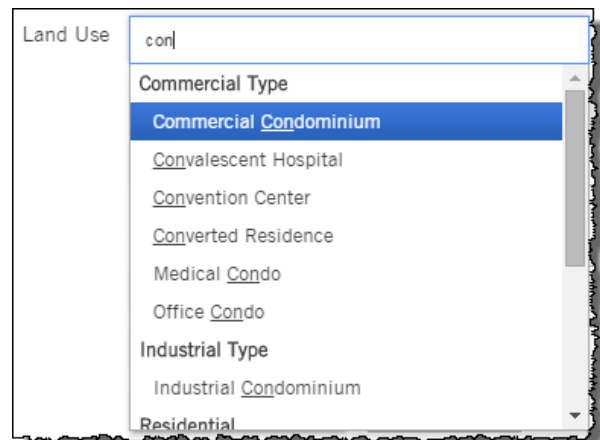
Drop Selection menus will include an “Add More” link which allows you to add multiple entries from the list into the filter.

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 the 'Subdivision' filter interface. At the top, there is a label 'Subdivision' and an 'Add More' button. Below this is a search input field with the placeholder text 'Type to search'. The interface is divided into two main columns: 'AVAILABLE SUBDIVISIONS' on the left and 'SELECTED SUBDIVISIONS' on the right. Both columns contain empty rectangular boxes for displaying results. 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 'Subdivision' filter interface with annotations. A yellow callout with the number '1' points to the search input field, which now contains the text 'villa'. A yellow callout with the number '2' points to the 'AVAILABLE SUBDIVISIONS' list, which now displays 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 yellow callout with the number '3' points to the '16 CERRO VILLA HEIGHTS' entry in the 'AVAILABLE SUBDIVISIONS' list, which is highlighted. A yellow callout with the number '4' points to the blue 'Apply' button at the bottom right. The 'SELECTED SUBDIVISIONS' column now contains the entry '16 CERRO VILLA HEIGHTS' with a small 'x' icon next to it, indicating it has been moved from the available list. The 'Select All' and 'Clear All' buttons are still present at the bottom of their respective columns.

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:

LOCATION

Address Bundle

Street #

is between

500

and

650

Pre Direction

Add More

Select all | Deselect all

Street Name

is

Washington

Street Type

Common Types : Avenue

Add More

Select all | Deselect all

Post Direction

Add More

Select all | Deselect all

Unit #

is between

and

Add to Search

STATE & COUNTY BUNDLE

State

California

County

Orange

LOCATION

ADDRESS BUNDLE

Street #

500 - 650

Street Name

Washington

Street Type

Avenue

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

Figure 2:

LOCATION

Address Bundle

Street #

is between

and

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

Unit #

is between

and

Add to Search

STATE & COUNTY BUNDLE

State

California

County

Orange

LOCATION

ADDRESS BUNDLE

Street #

500 - 650

Street Name

Washington

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

LOCATION

Address Bundle

Street #

is between

200

and

700

Pre Direction

Add More

Select all | Deselect all

Street Name

is

Firestone

Street Type

Common Types : Drive

Add More

Select all | Deselect all

Post Direction

Add More

Select all | Deselect all

Unit #

is between

and

Add to Search

STATE & COUNTY BUNDLE

State

California

County

not Contra Costa

LOCATION

ADDRESS BUNDLE

Street #

500 - 650

Street Name

Washington

Street Type

Avenue

ADDRESS BUNDLE

Street #

200 - 700

Street Name

Firestone

Street Type

Drive

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

Figure 4

LOCATION

Address Bundle

Street #

is between

and

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

Unit #

is between

and

Add to Search

City

is

+

ZIP Code

is

+

APN

is

+

STATE & COUNTY BUNDLE

State

California

County

not Contra Costa

LOCATION

ADDRESS BUNDLE

Street #

500 - 650

Street Name

Washington

Street Type

Avenue

ADDRESS BUNDLE

Street #

200 - 700

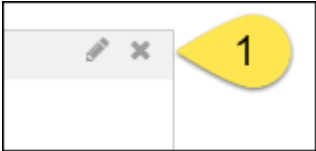
Street Name

Firestone

Street Type

Drive

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.

State & County Bundle

State

Click or Type ▼

County

is not ▼

Add More

Select all | Deselect all

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.

is ▲

is

is between

Location Filters

Address Bundle

▼ LOCATION

Address Bundle

Street #

is between ▼

and

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

Unit #

is ▼

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 ▲

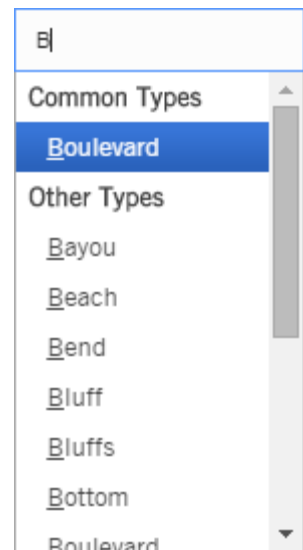
is

is not

starts with

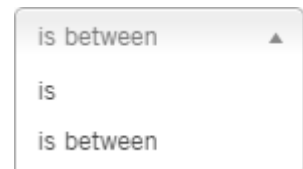
contains

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.



A screenshot of a web application's street type dropdown menu. At the top is a search input field containing the letter 'B'. Below the input, the menu is divided into two sections: 'Common Types' and 'Other Types'. Under 'Common Types', the option 'Boulevard' is highlighted with a blue background. Under 'Other Types', several options are listed: 'Bayou', 'Beach', 'Bend', 'Bluff', 'Bluffs', 'Bottom', and 'Boulevard'. A vertical scrollbar is visible on the right side of the menu.

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



A screenshot of a web application's unit number dropdown menu. The menu is open, showing three options: 'is between' (which is highlighted), 'is', and 'is between'.

Location (Continued)

City

is

+

ZIP Code

is

+

APN

is

+

Tax Area

is

+

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

+

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.

is

is

is between

starts with

Tax Area: Text and numeric entry.

is

is

starts with

contains

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

NOTE: Not all counties populate the subdivision field.

san marco

AVAILABLE SUBDIVISIONS

SAN MARCO #2
SAN MARCO #9
SAN MARCO 02

Select All

SELECTED SUBDIVISIONS

Clear All

Apply

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.

regency

AVAILABLE HOA

HILLVIEW REGENCY
CONDOMINIUM ASSOCIATION
HILLVIEW REGENCY
HOMEOWNERS ASSC.
LAGUNA REGENCY
HOMEOWNERS ASSOCIATION

Select All

SELECTED HOA

Clear All

Apply

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

The screenshot shows a web form interface for selecting school districts. At the top, there is a search input field containing the text "orange". Below this, the form is divided into two main sections: "AVAILABLE DISTRICTS" on the left and "SELECTED DISTRICTS" on the right. The "AVAILABLE DISTRICTS" section contains a list box with the text "ORANGE UNIFIED SCHOOL DISTRICT". Below the list box is a "Select All" button. The "SELECTED DISTRICTS" section is currently empty, with a "Clear All" button below it. At the bottom right of the form, there is a blue "Apply" button.

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

Add More

Select all | Deselect all

County Land Use

Add More

Zoning Code

is between ▼

and

+

Site Influence

Add More

Select all | Deselect all

Year Built

is between ▼

and

Living Area (Sq. Ft.)

is between ▼

and

Bedrooms

is between ▼

and

Bathrooms

is between ▼

and

Total Rooms

is between ▼

and

Lot Area

is between ▼

and

Lot Acreage

is between ▼

and

Stories

is between ▼

and

Pool

Click or Type ▼

Garage Spaces

is between ▼

and

of Units

is between ▼

and

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

Year Built

is between ▲

is

is between

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	SELECTED USE CODES
103-RELIGIOUS	
104-RESEARCH & DEVELOPMENT	
105-RESIDENTIAL	
110-RESTAURANT	

Select All 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

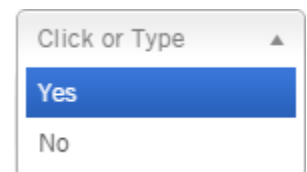
Lot Area: A numeric value.

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.



Click or Type ▲
Yes
No

of Units: Takes a numeric value.

Owner

▼ OWNER

Owner Last Name

is

+

Owner First Name

contains

+

Owners (All)

contains

+

Owner Ethnicity

Add More

Select all | Deselect all

Exemption

Add More

Select all | Deselect all

Owner Occupied

Add More

Select all | Deselect all

\$

 Properties Owned

is between

and

Corporate Owned

Click or Type

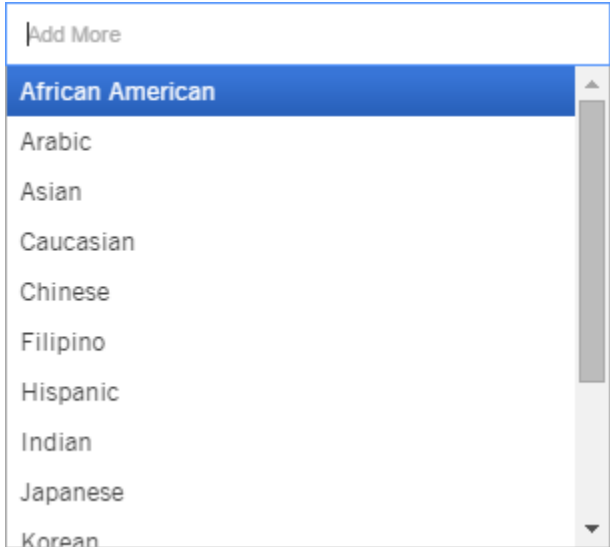
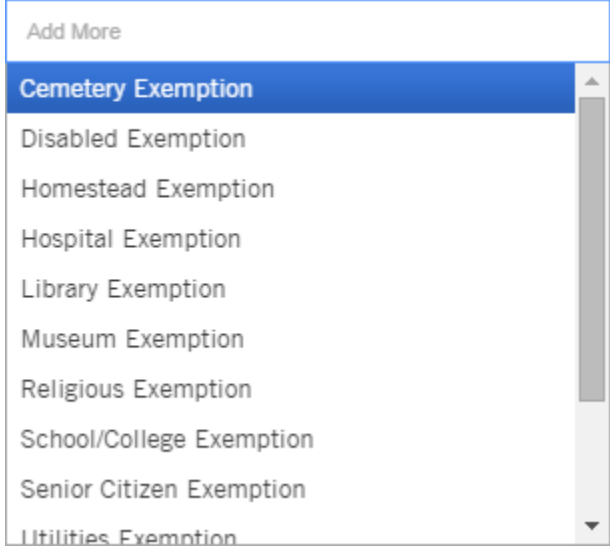
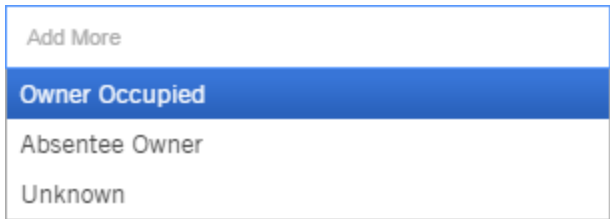
▼

Do Not Mail

Click or Type

▼

Fields (in form order)	Additional Notes:
Owner Last Name, Owner First Name and Owner (Other): Alpha characters.	<div><div>is</div><div>is</div><div>is not</div><div>starts with</div><div>contains</div></div>

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

Corporate Owned: Drop selection field.	<div>Click or Type ▲ Exclude Corporate Owned Only Corporate Owned Include All Ownership Types</div>
Do Not Mail: Drop-selection; leave blank to include all records regardless of Do Not Mail flag.	<div>Click or Type ▲ Include Exclude</div>

Owner – Mailing State and County Bundle

Mailing State & County Bundle

Mailing State

is

▼

Click or Type

▼

Mailing County

is

▼

Add More

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 #

is between ▼

and

Mailing Pre Direction

Add More

Select all | Deselect all

Mailing Street Name

is ▼

Mailing Street Type

Add More

Select all | Deselect all

Mailing Post Direction

Add More

Select all | Deselect all

Mailing Unit #

is ▼

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 between ▲

is

is between

even range

odd range

is ▲

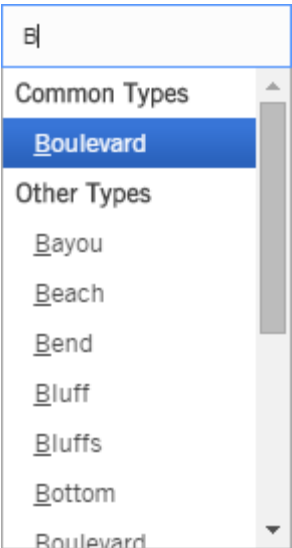
is

is not

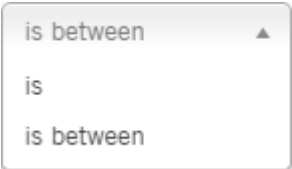
starts with

contains

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

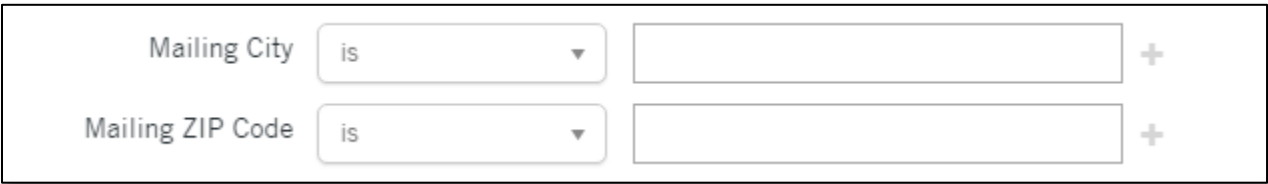


Mailing Unit #: Numeric input field.



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.

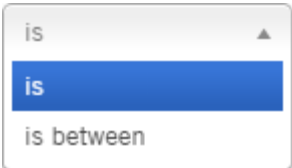
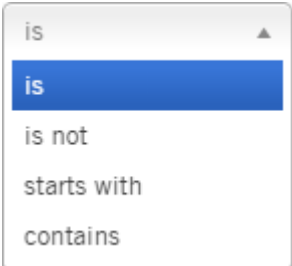


Field (in form order):

City: Text entry only.

Zip Code: Numeric entry.

Additional Information:



Owner – International Mailing Bundle

International Mailing Bundle

Mailing Country

Add More

Select all | Deselect all

Canadian Mailing Province

is

Add More

Select all | Deselect all

Canadian Mailing City

is

Canadian Mailing Postal Code

is

Add to Search

Field (in form order)

Additional Information:

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.

Canadian Mailing Provinces: Drop select list.

Add More

Alberta

British Columbia

Manitoba

New Brunswick

Newfoundland and Labrador

Nova Scotia

Northwest Territories

Nunavut

Ontario

Prince Edward Island

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.

is

is

is not

Sale Information:

▼ SALE INFORMATION

Transaction Type

Click or Type

Sale Price

is between

and

Sale Price Type

Add More

Select all | Deselect all

Last Sale Date

is between

and

Last Sale Recording Date

is between

and

Recording Month

Click or Type

Seller Name

is

+

Transaction Deed Type

Add More

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.

Add More

Confirmed

Estimated

Full Value

Committed

Not Disclosed

Partial

Lease

Unknown

Verified

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

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

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.

is ▲

is

is not

starts with

contains

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

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

is between ▼

and

Mortgage Recording Date

is between ▼

and

Mortgage Type

Add More

Select all | Deselect all

Seller Carryback

Click or Type ▼

Interest Rate

is between ▼

and

Financing Deed Type

Add More

Select all | Deselect all

Interest Rate Type

Add More

Select all | Deselect all

Original Lender Name

is ▼

Add More

Title Company

Add More

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.

Add More

Community Dev Auth.

Conventional

Construction

FHA

Private Party

SBA

VA

Seller Carryback: Drop selection.

Click or Type

Only Seller Carrybacks

No Seller Carrybacks

Interest Rate: Numeric input value.
TIP: Interest rates are only available on properties with Adjustable Rate mortgages.

is

is

is between

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.

Add More

All Inclusive Deed of Trust

Assumption

Construction Deed of Trust

Deed of Trust

Down Payment Assistance Loan

Equity or Credit Line

Indemnity Deed of Trust

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

Add More

Fixed

Adjustable

Variable

Balloon

Graduated

Original Lender Name: Search to pick list.

AVAILABLE LENDERS

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

Select All

SELECTED LENDERS

Clear All

Apply

Title Company: Search to pick list.

AVAILABLE TITLE COMPANIES

NEW WORLD
NEW WORLD ABSTRACT
NEW WORLD ABSTRACT CO
NEW WORLD TITLE
NEW WORLD TITLE & ESCROW

Select All

SELECTED TITLE COMPANIES

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
Very High Likelihood
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 ▼		and	
Assessed Land Value	is between ▼		and	
Assessed Improvement Value	is between ▼		and	
Assessed Improvement %	is between ▼		and	
Market Total Value	is between ▼		and	
Market Land Value	is between ▼		and	
Market Improvement Value	is between ▼		and	
Market Improvement %	is between ▼		and	
Appraised Total Value	is between ▼		and	
Appraised Land Value	is between ▼		and	
Appraised Improvement Value	is between ▼		and	
Appraised Improvement %	is between ▼		and	

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

is ▲
is
is between

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

is between ▼

and

Equity %

is between ▼

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

is between ▼

\$-500,000

and

\$0

Equity %

is between ▼

-50%

and

0%

Market Value

▼ MARKET VALUE

Estimated Value

is between ▼

and

Field (in form order)

Additional Information

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

The field uses the data from the First American AVM

Listing Information

▼ LISTING INFORMATION

Listing Status

Add More

Select all | Deselect all

Listing Date

is between ▼

and

Listing Price

is between ▼

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

Click or Type ▼

Foreclosure Recorded Date

is between ▼

and

Foreclosure Event Date

is between ▼

and

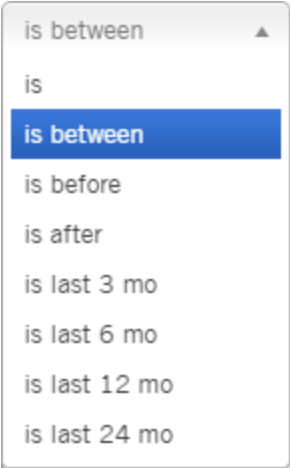
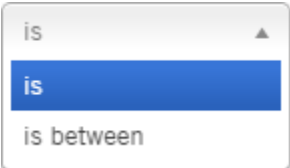
Foreclosure Amount

is between ▼

and


Add to Search

Fields (in form order)	Additional Information:
<p>Foreclosure Status: 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>Default: The homeowner has failed to pay their mortgage for a certain period of time.</p> <p>Auction: The property is scheduled to be sold at auction to recover the outstanding balance.</p> <p>REO: 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>REO Sale: The last market sale was from the lienholder to a private individual.</p> <p>Short Sale: Describes the sale of a property where the sale amount is less than the origination amounts of the open liens.</p>
<p>Foreclosure Recorded Date: The recording date of the selected foreclosure status.</p>	<div><div>is between ▲</div><div>is</div><div>is between</div><div>is before</div><div>is after</div><div>is last 3 mo</div><div>is last 6 mo</div><div>is last 12 mo</div><div>is last 24 mo</div></div>

<p>Foreclosure Event Date: 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>Foreclosure Amount: Numeric input value.</p>	

HOA Lien

▼ HOA LIEN


Open HOA Lien Present

Click or Type ▼

Fields (in form order)	Additional Information:
<p>Open HOA Lien Present:</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>