Innovations to GO BEYOND

TITLE DATA and AUTOMATION
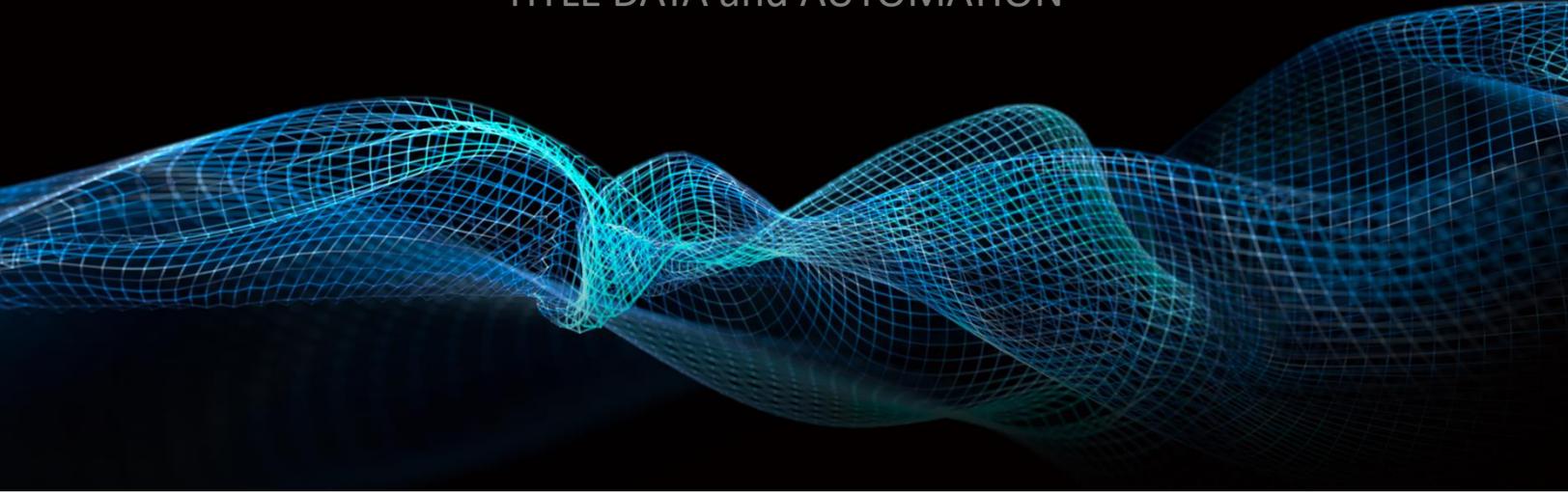
DATATRACE USER GUIDE: MARKETVIEW

Rev. 20200811

DataTrace®

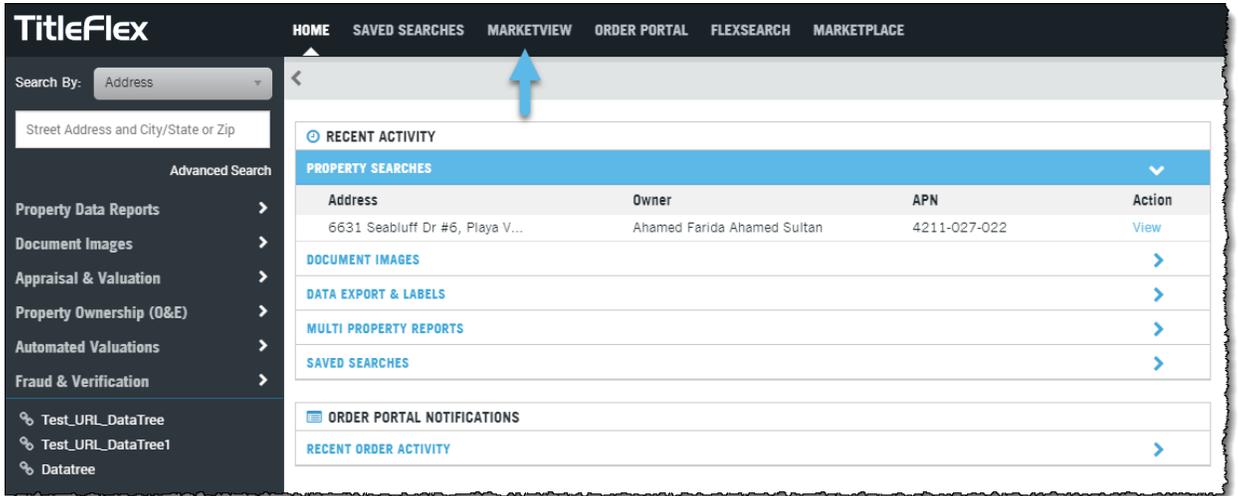# Table of Contents

Overview

This guide will illustrate the processes for:

- Accessing MarketView
- Creating and Saving Searches
- Order Reports and Exports
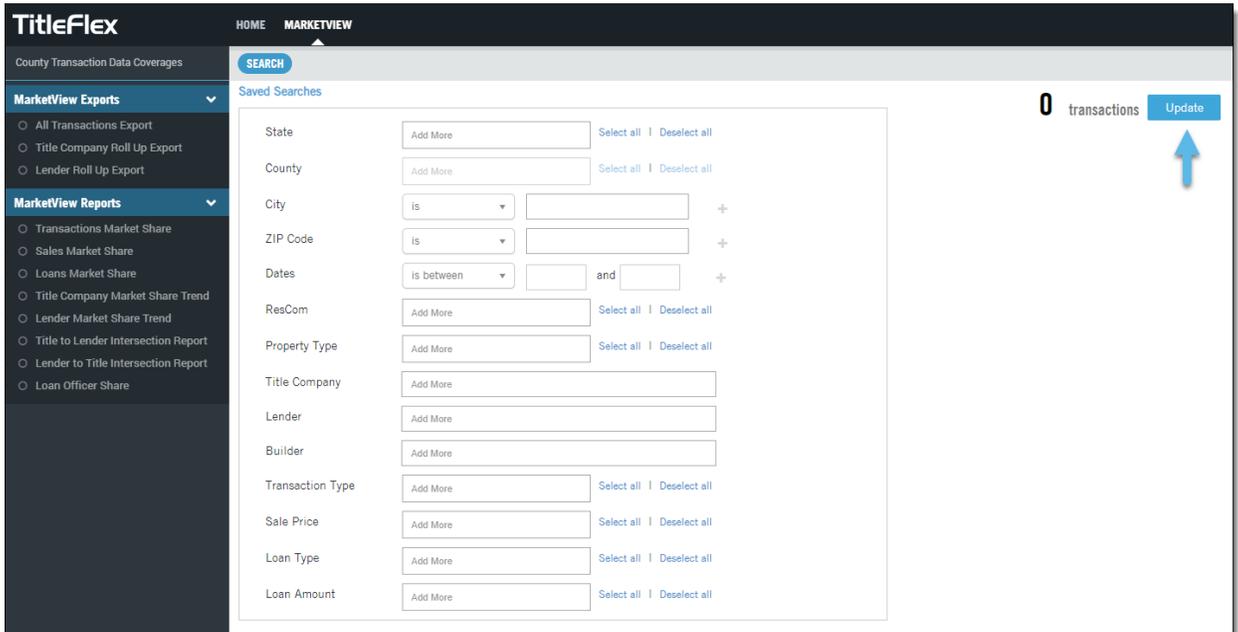- Scheduling Automated Reports

This guide also defines the contents of each report/export as well as search criteria
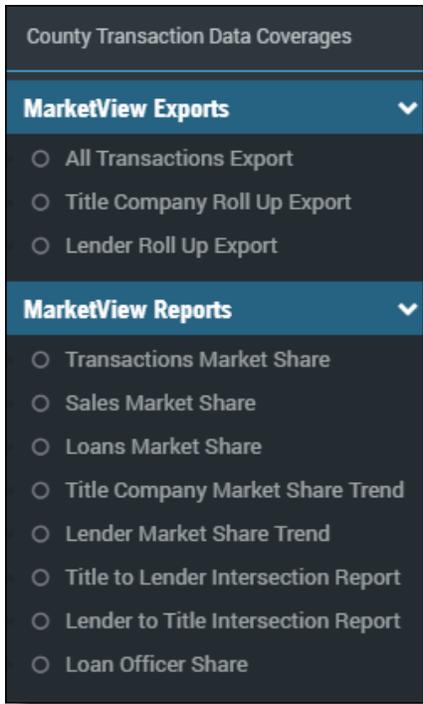
Interface Overview & Flow

MarketView can be accessed via the link on the top bar.

MarketView reporting begins with a custom search. To run a search, click the **Update** button to get a count of transactions.

Then select one or more reports from the menu at the left and click the Order button. Searches can be saved to be used again in the future.

Ordered reports appear in place of the search menu. Users can view all of the reports and the search menu by selecting from the gray bar above. Reports can be saved, printed or emailed from this view.
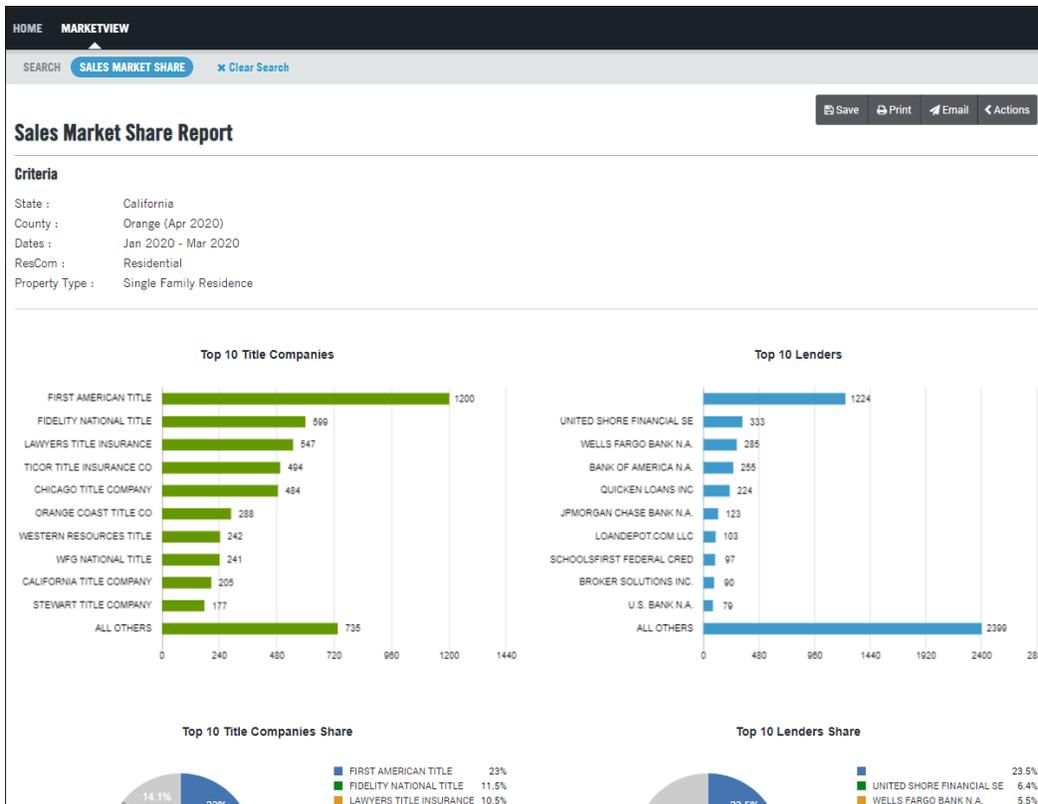
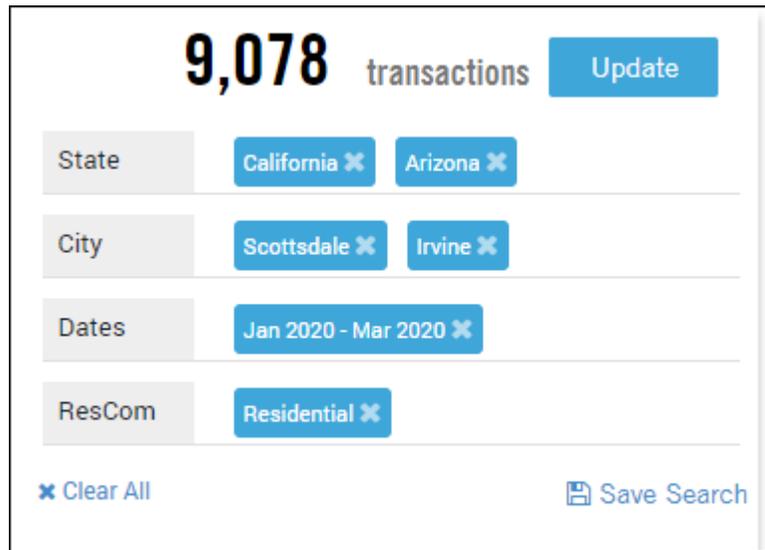# Search

MarketView's search engine enables users to generate customized reporting based on multiple parameters, including geography, time, transaction type and companies involved. As a search is built, criteria are posted to the right column. Clicking the Update button generates a count and activates available reports to be ordered.

State Filter - Users can select as many states as necessary to complete the desired search. The states available in the menu may vary based on the account's geographic provisioning.
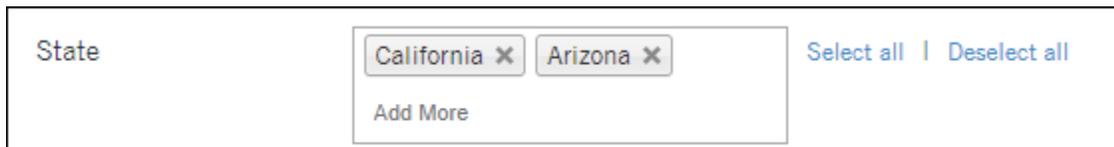

County Filter – As long as only one state is selected, users can select as many counties from the selected state as necessary to complete the desired search. The counties available in the menu may vary based on the account's geographic provisioning.

City Filter – Users can key in the names of cities to include in a search. Use the plus to add more cities. The City filter does not relate to the State filter, so a search of Arizona + Chicago will not return any results, but a search of Arizona + Phoenix will. Users can also exclude cities from a search by using the "Is Not" operator.
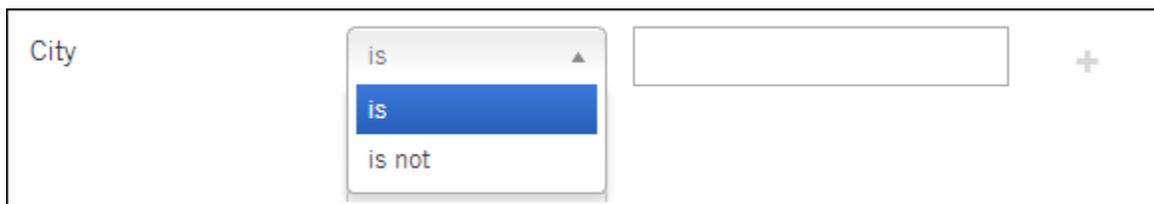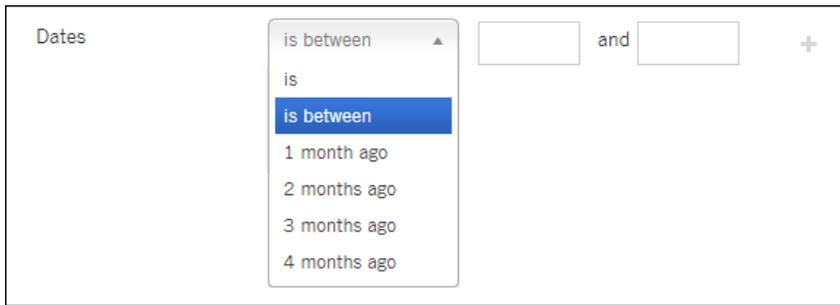
ZIP Code Filter – Users can select a ZIP code, range of ZIP codes or multiple individual ZIP codes to include in a search.

Dates Filter – The Dates filter enables searches to be run for a single month, multiple whole months or a range of whole months.

ResCom Filter – Searches can be limited to only Residential property transactions or Commercial property transactions using the ResCom filter.
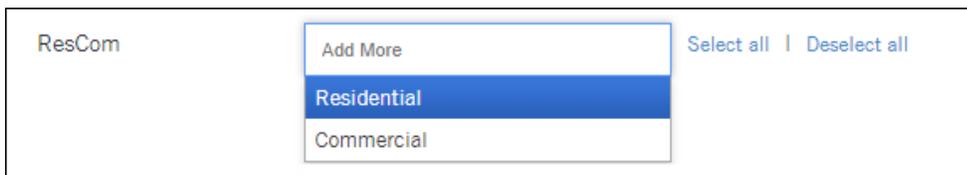
Property Type Filter – Specific property types can be selected with this filter. Examples include Single Family Residence, Condominium, Office Building and Vacant.
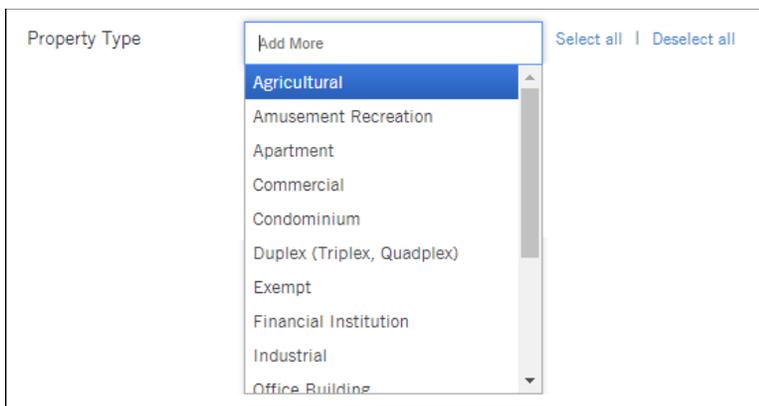
Title Company Filter – Use this filter to limit a search to only transactions that included a specific title company or title companies.

Title Company	Add More
	Type to search
	AVAILABLE TITLE COMPANIES SELECTED TITLE COMPANIES
	Select All Clear All
	Apply

Lender Filter – Use this filter to limit a search to only transactions that included a specific lender or lenders.

Lender	Add More
	Type to search
	AVAILABLE LENDERS SELECTED LENDERS
	Select All Clear All
	Apply

Builder Filter - Use this filter to limit a search to only transactions that included a specific builder or builders.

Transaction Type Filter – Use this filter to limit a search to specific transaction types. Examples include Resale, Refinance, Cash Sale, REO and Subdivision/New Home.

Sale Price Filter – Use this filter to select a range of sale prices to include in the search.
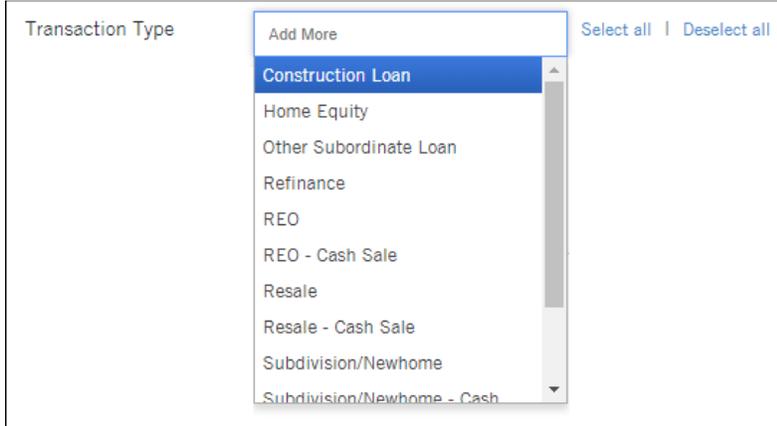
Loan Type Filter – Use this filter to limit a search to specific loan types, including Conventional, FHA and VA.
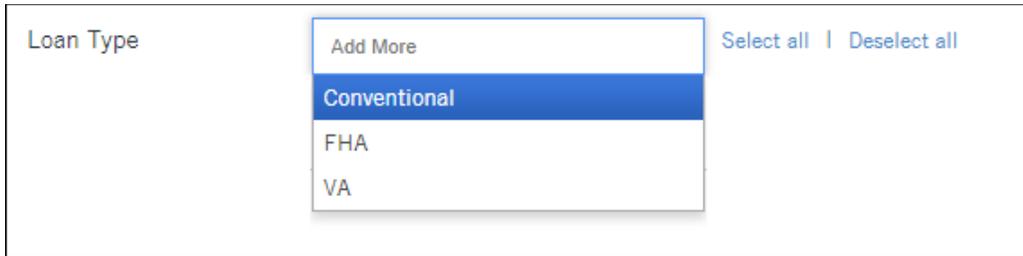
Loan Amount Filter – Use this filter to select a range of sale prices to include in the search.

Reports

Market Share Reports – There are three Market Share reports. All three offer graphs depicting the top ten title companies and lenders according to the specific custom query run by the user. All three also list out number and share percentage of the top 100 title companies and lenders.

- Transactions Market Share Report (Online View & PDF) – The Transactions Market Share report shows statistics for all transactions, sales and loans together, for up to 100 title companies and 100 lenders.

- Sales Market Share Report (Online View & PDF) – The Sales Market Share report shows statistics for all sales for up to 100 title companies and 100 lenders.

- Loans Market Share Report (Online View & PDF) – The Loans Market Share report shows statistics for all loans processed by the top 100 for title companies and lenders.

Trend Reports – There are two Trend Reports, one for title companies and one for lenders. These reports show a 13-month trendline for the total market, according to the user's specific custom query and similar trendlines for each of the top five companies. Following the trendline graphs, a Trend Details table shows the most recent 13 months of transactions for the top 100 companies, each company's market share for each month and year-over-year growth for each company.
- Title Company Market Share Trend Report (Online View & PDF)
- Lender Market Share Trend Report (Online View & PDF)

Intersection Reports – The two Intersection Reports provide a look at the relationships between title companies and lenders from both perspectives. A transaction count, a 12-month average and a trend indicator is provided for each lender/title company relationship, broken out into three categories – Purchase, Refinance and Equity/Other.
- Title Company to Lender Intersection Report (Online View & PDF)
- Lender to Title Company Intersection Report (Online View & PDF)

Loan Officer Share Report (Online View & PDF) – The Loan Officer Share Report uses NMLS data to list out the top performing loan officers based on the queried information. For each loan officer, the report shows the loan officer's name, NMLS ID, lender, broker, total number and market share of loans and total dollar volume and market share by dollar volume. The report also includes a link to the NMLS Consumer Access website to provide publicly-available contact information for each loan officer.

Exports

All Transactions Export (CSV) – This export provides all of the market share information at a transaction-level. This export gives users full access and control to the MarketView transaction and NMLS databases for fully-custom reporting.

Title Company Roll Up Export (CSV) – This export provides totals for each title company, including:
- Total Sales #
- Total Sales $
- Total Loan #

- Total Loan $
- Counts for each Sale Type
- Counts for each Loan Type

Lender Roll Up Export (CSV) – This export provides totals for each lender, including:
- Total Sales #
- Total Sales $
- Total Loan #
- Total Loan $
- Counts for each Sale Type
- Counts for each Loan Type

Saved Searches

MarketView users can save any search for future re-use. This is a great option for users who generate the same type of reporting each month or quarter.
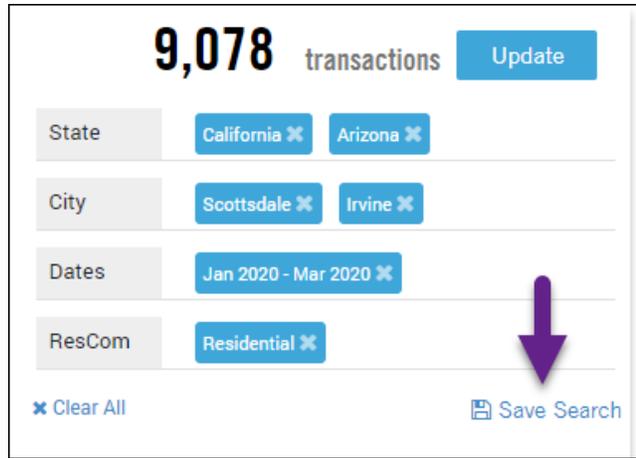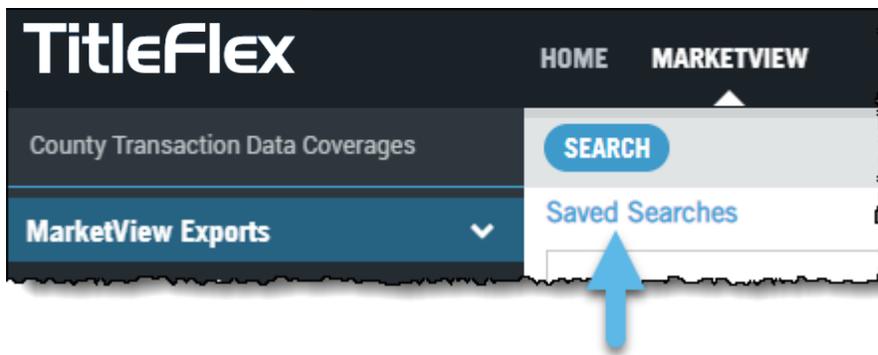

Saved searches can be retrieved via the **Saved Searches** link atop the search filters menu.

Saved searches can be launched from the Saved Searches modal, where they can also be renamed, copied or deleted. When the list of saved searches gets long, users can employ the Find a Search feature to locate the desired saved search by name.

County Data Currency Lookup

MarketView reporting is dependent on having critical mass of recorded transactions in the database in order to report statistically-valid metrics. Since every county records transactions on different schedules, each will reach a "completed" status at different intervals. Users expect to see this information available right in the product, so we will be adding this in the August release.
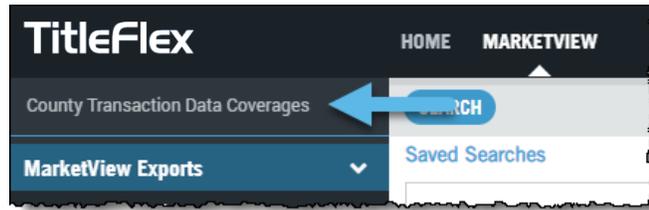
A County Transaction Data Coverage link will launch a lookup modal.

In this modal, users can look up a state and view the Complete Month and Last Update of each county in the state. The dates will be dynamically updated weekly.
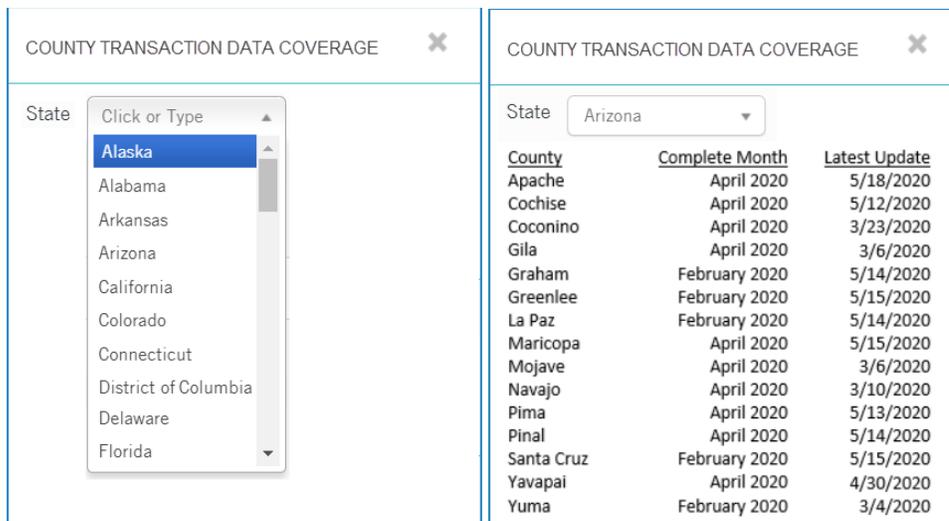
The completed month for each county will also be shown in the Criteria section of the reports to provide contextual reference to report readers.

Automated Report Delivery (Coming September 30, 2020)

MarketView users will soon have the ability to schedule saved searches to run at monthly or weekly intervals and automatically email selected reports to people in their organization, so they don't have to manually pull and send the reports every time.

A modal-based interface to set up automated jobs will be created. This enables the automated report delivery feature to scale beyond MarketView reports as the modal will be able to be launched from anywhere a link is added in TitleFlex. It also enables a many-to-one/one-to-many relationship between searches and automated jobs.

In this modal, users will:
- Give the job a name
- Select the frequency for the job (day of month/day of week)
- Select an existing saved search to leverage
- Select reports to be generated
- Enter email addresses of recipients, up to 100 addresses

On the selected dates, the selected search will run overnight. The selected reports will be emailed to the provided email recipients. The reports will also be stored for retrieval in the Scheduled Reports modal for 90 days in case somebody missed an email. This menu will show the job name, the saved search used, the last run date and the date the reports will be purged from the system as well as a link to download the PDF reports.

The Scheduled Reports modal will be accessible from MarketView's Saved Searches modal. A Create & Manage Scheduled Report Jobs link will launch the modal displaying the full list of jobs for the account. A Manage link on each linked saved search will launch a filtered presentation of the modal that will show only the jobs that leverage that search.