



**TitleFlex**  
by Data Trace

# USING THE TRANSACTION HISTORY REPORT

Rev. 201704

**Overview:**

This document will provide an overview of the Transaction History Basic and Full Reports.

**Transaction History Basic:**

This report provides a quick look at a property's sales and mortgages only.

**Transaction History Full:**

The Full version includes the sales and mortgages but expands to include assignments, releases, and foreclosures.

## Common Features:

Both reports allow the user to display information grouped by owner or in descending chronological order. The display can be configured “on-the-fly” by click the “View Report...” link at the top right hand corner of the report.

[View report in Owner format](#)

[View report in Date format](#)

*Shown in Date Format*

<input type="checkbox"/>	Date <b>1</b>	Type	Amount	Borrower(s)	Lender	Buyer	Seller	+ Details <b>3</b>
<input type="checkbox"/>	03/25/2016	Sale	\$773,000			Slater Edward J III / Slater Brianna L	Leffler James E	+
<input type="checkbox"/>	03/25/2016	Finance	\$618,221	Slater Edward J III / Slater Brianna L	United Wholesale Mtg			- <b>2</b>
<input checked="" type="checkbox"/>		<b>VERIFIED</b>	<i>Loan Type: Conventional</i>	<i>Doc Type: Trust Deed/Mortgage</i>	<i>Doc #: 2016.126536</i>			
			<i>Rate Type:</i>	<i>Rate:</i>	<i>Term: 30 Years</i>			
<input type="checkbox"/>	04/21/2006	Sale				Leffler James E	Leffler James E	+
<input type="checkbox"/>	12/18/2002	Finance	\$250,261	Leffler James E / Leffler Peggy A	Washington Mutual FSB			+
<input type="checkbox"/>	04/18/2001	Finance	\$250,000	Leffler James E	Cendant Mortgage Corp			+
<input type="checkbox"/>	02/25/2000	Sale	\$273,000			Leffler James E	Ring Robert G & Kristi E	+
<input type="checkbox"/>	02/25/2000	Finance	\$245,700	Leffler James E	Washington Mutual FSB			+
<input type="checkbox"/>	04/22/1999	Finance	\$25,000	Ring Kristi E / Ring Robert G	Headlands Mortgage			+
<input type="checkbox"/>	04/09/1999	Finance	\$196,000	Ring Kristi E / Ring Robert G	Headlands Mortgage			+
<input type="checkbox"/>	05/20/1997	Finance	\$25,000	Ring Kristi E / Ring Robert G	Coast Cities Financial			+
<input type="checkbox"/>	03/07/1997	Sale	\$194,000			Ring Kristi E / Ring Robert G	Mika, Jack A & Beth B	+
<input checked="" type="checkbox"/>	03/07/1997	Finance	\$174,600	Ring Kristi E / Ring Robert G	Norwest Mortgage INC			+
<input type="checkbox"/>	03/12/1993	Finance	\$158,000	Mika Beth B / Mika Jack A	First Federal Bank Ca			+
<input type="checkbox"/>	08/12/1988	Finance	\$133,000	Mika Jack A & Be	Preferred Financial Funding			+

**ORDER**

The report, in this format, simply lists documents in chronological recording order (1). Expand the plus sign (2) under the Details (3) column for additional information on each record.

Shown in Owner Format

**Current Owner: Slater Edward J III / Slater Brianna L** 1 [View report in Date format](#)

Vesting: Husband And Wife / Joint Tenant  
2016 - Present

**LIENS** 3 4 5 6 7 8

<input type="checkbox"/>	Date	Type	Verified	Amount	Borrower(s)	Lender	Loan Type	Type / Term	Rate	Document #
<input type="checkbox"/>	03/25/2016	Trust Deed/Mortgage	✓	\$618,221	Slater Edward J III / Slater Brianna L	United Wholesale Mtg	Conventional	/ 30 Years		2016.126536

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**CONVEYANCES**

<input type="checkbox"/>	Date	Rec Date	Verified	Price	Type	Title Company	Buyer	Seller	Document #
<input type="checkbox"/>	03/03/2016	03/25/2016	✓	\$773,000	Full Value	Lawyers Title	Slater Edward J III / Slater Brianna L	Leffler James E	2016.126535

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**Prior Owner: Leffler James E** 2

2000 - 2016

**LIENS**

<input type="checkbox"/>	Date	Type	Verified	Amount	Borrower(s)	Lender	Loan Type	Type / Term	Rate	Document #
<input type="checkbox"/>	12/18/2002	Trust Deed/Mortgage		\$250,261	Leffler James E / Leffler Peggy A	Washington Mutual FSB	Conventional	Fix /		2002.1156087
<input type="checkbox"/>	04/18/2001	Trust Deed/Mortgage		\$250,000	Leffler James E	Cendant Mortgage Corp	Conventional	Fix /		2001.232846
<input type="checkbox"/>	02/25/2000	Trust Deed/Mortgage	✓	\$245,700	Leffler James E	Washington Mutual FSB	Conventional	Var /		2000.101488

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**CONVEYANCES**

<input type="checkbox"/>	Date	Rec Date	Verified	Price	Type	Title Company	Buyer	Seller	Document #
<input type="checkbox"/>	04/20/2006	04/21/2006				Gateway Title	Leffler James E	Leffler James E	2006.269137
<input type="checkbox"/>	01/28/2000	02/25/2000	✓	\$273,000	Full Value	Fidelity National Title	Leffler James E	Ring Robert G & Kristi E	2000.101488

In Owner Format, the reports groups liens and conveyances by the owner (1, 2) starting with the current (1) and moving back in time (2 or more). The report also moves the “Details” found in the Basic version direction into each record line (items 3 – 8).

## Document Layout

Indented documents (1, 2, 3) modify the “parent” document, immediately above them.

LIENS										
<input type="checkbox"/>	Date	Type	Verified	Amount	Borrower(s)	Lender	Loan Type	Type / Term	Rate	Document #
<input type="checkbox"/>	07/16/2003	Refinance		\$558,800	Roger John C / Roger Lisa M	Bank Of America	Conventional	Fix /		2003.836143
<input type="checkbox"/>	^ 10/22/2003	Release	1							2003.1302543
<input type="checkbox"/>	10/11/2002	Refinance		\$563,000	Roger John C / Roger Lisa M	Bank Of America	Conventional	Fix /		2002.883381
<input type="checkbox"/>	^ 09/10/2003	Release	2							2003.1105810
<input type="checkbox"/>	03/01/2001	Refinance		\$84,000	Roger John C / Roger Lisa M	Sanwa Bank California	Conventional	Var /		2001.116578
<input type="checkbox"/>	^ 10/11/2002	Subordination								2002.883380
<input type="checkbox"/>	^ 07/16/2003	Subordination	3							2003.836142
<input type="checkbox"/>	^ 10/21/2003	Release								2003.1294025
<input type="checkbox"/>	04/07/1999	Refinance		\$66,200	Roger John C / Roger Lisa M	Norwest Bank Colorado	Conventional	Var /		1999.254846
<input type="checkbox"/>	^ 11/15/2002	Release								2002.1033123
	4 03/31/1998	Subdivision	5	\$516,950	Roger Lisa M / Roger John C	Norwest Mortgage Inc	Conventional	Fix /		

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Documents with the green checkmark (5) are “Verified”, indicating that the transaction was cross-referenced in more than one data source.

The courthouse icon (4) links to the Abstractor Service. If a document image is unavailable, use the Abstractor Service to send an abstractor to the local government offices to search for and retrieve the document image. For more information on this feature, see the Document Retrieval guide.