

Innovations to GO BEYOND
TITLE DATA and AUTOMATION

FILTER CATALOG FOR FARMING

Rev. 201904

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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.

Before You Begin

The platform aggregates multiple data sources, including county supplied sources (Assessor and Recorder). Different counties provide different populations of data. Before starting a farm, if you are unsure of what data is available within a given county, you may wish to order a Property Detail report to check on what fields are populated.

Comparative examples from different states and counties:

Property Characteristics			
Gross Living Area:	1,670 Sq. Ft.	Total Rooms:	0
Living Area:	1,670 Sq. Ft.	Bedrooms:	
Total Adj. Area:		Baths (F / H):	
Above Grade:	1670	Pool:	
Basement Area:		Fireplace:	
Style:	Ranch	Cooling:	Central
Foundation:		Year Built / Eff:	1995
Quality:	Average	Stories:	1
Condition:		Parking Type:	Detached
		Garage #:	3
		Garage Area:	864 Sq. Ft.
		Porch Type:	Porch

Property Characteristics			
Gross Living Area:	1,729 Sq. Ft.	Total Rooms:	8
Living Area:	1,729 Sq. Ft.	Bedrooms:	3
Total Adj. Area:		Baths (F / H):	2 / 1
Above Grade:	1729	Pool:	
Basement Area:		Fireplace:	1
Style:		Cooling:	Central
Foundation:	Slab	Heating:	Forced Air
Quality:	Average	Exterior Wall:	Stucco
Condition:	Average	Construction Type:	
		Year Built / Eff:	1972 / 1973
		Stories:	2
		Parking Type:	Garage
		Garage #:	2
		Garage Area:	440 Sq. Ft.
		Porch Type:	
		Patio Type:	Patio
		Roof Type:	
		Roof Material:	Tile

Tax Information

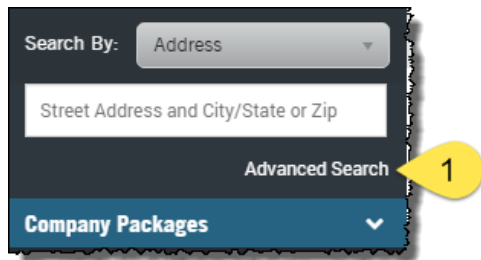
Assessed Year:	2018	Assessed Value:	\$327,399	Market Total Value:	
Tax Year:	2018	Land Value:	\$87,942	Market Land Value:	
Tax Area:	9-036	Improvement Value:	\$239,457	Market Imprv Value:	
Property Tax:	\$4,254.46	Improved %:	73.14%	Market Imprv %:	
Exemption:	Homestead	Delinquent Year:			

Tax Information

Assessed Year:	2019	Assessed Value:		Market Total Value:	\$233,622
Tax Year:	2018	Land Value:		Market Land Value:	\$47,476
Tax Area:	2291	Improvement Value:		Market Imprv Value:	\$186,146
Property Tax:	\$1,699.60	Improved %:		Market Imprv %:	79.68%
Exemption:		Delinquent Year:			

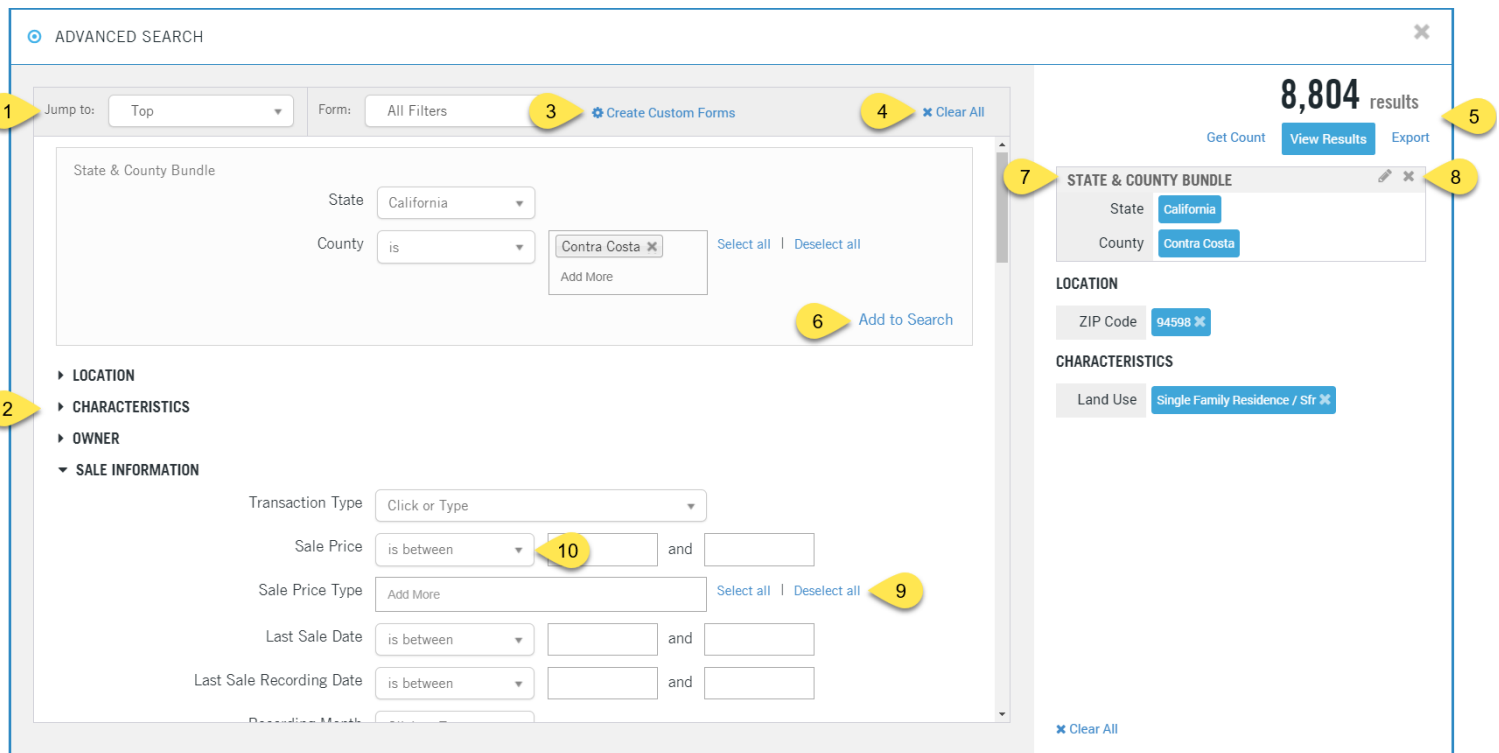
Getting Started

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.



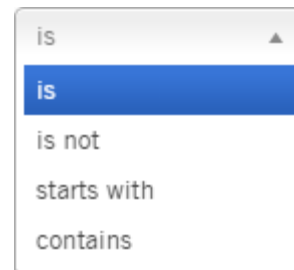
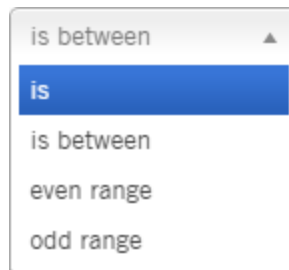
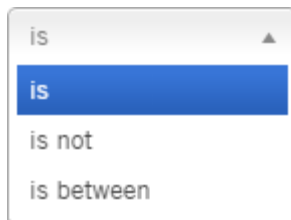
1. **Jump To:** Use to jump to a specific filter groups (2). You can also use the scroll bar to the right of the filters to scroll through the whole list.

2. **Filter Groups:** Shown both collapsed and open. Click the triangle next to the Group name to open or close the group.

3. **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.

4. **Clear All:** Removes all entries in a filter. This link only shows up when filter criteria have been set.

5. **Results** counter, **View Results**, **Get Count** and **Export**. Results will display the number of records matching your current filter set. Get Count refreshes the counter. View Results pulls the list of records. The Export link activates only when a list has been created.
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. This example shows the State and County 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 label 'Year Built', a dropdown menu showing 'is between', and two input fields containing '1965' and '1975' separated by the word 'and'.

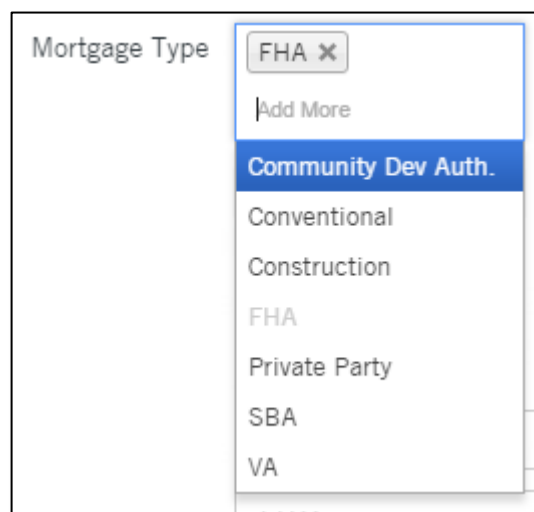
1. Operators with user defined entries

Single Entry:



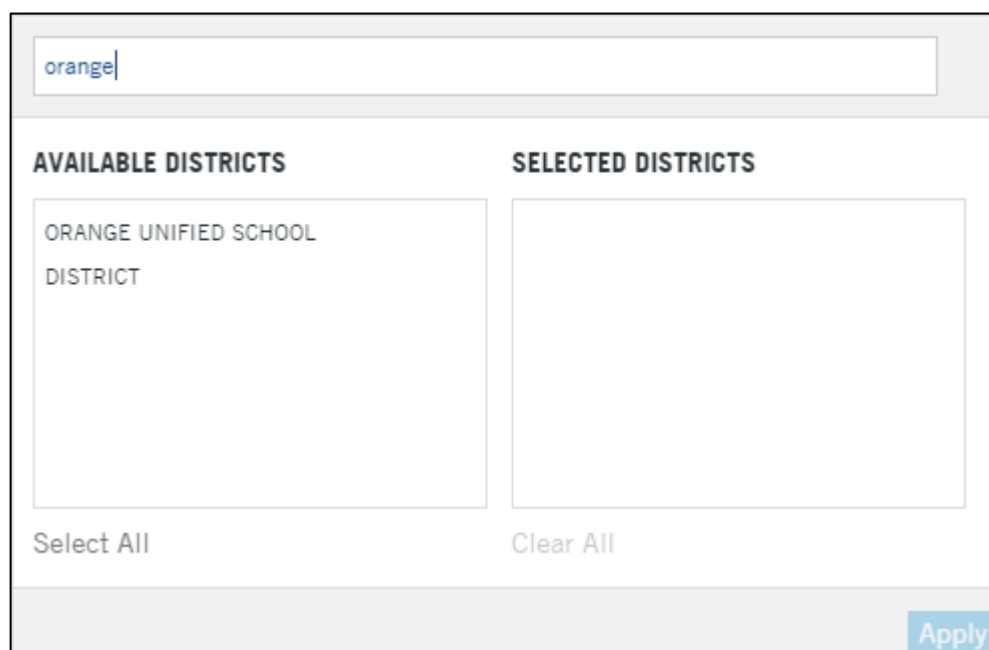
A single entry filter interface for 'Year Built'. It consists of a label 'Year Built', a dropdown menu showing 'is', and a single input field containing '1975'.

2. Drop Selection menus



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

3. Search to Pick lists



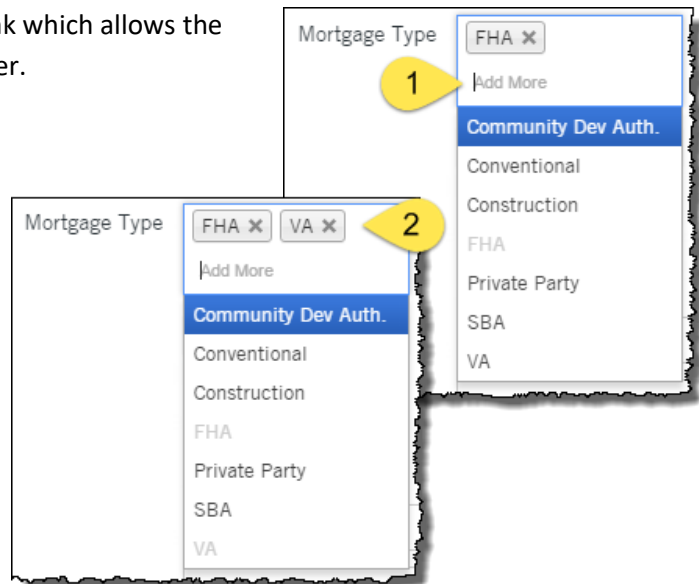
A search to pick lists interface. At the top is a search bar containing 'orange'. Below it are two columns: 'AVAILABLE DISTRICTS' and 'SELECTED DISTRICTS'. The 'AVAILABLE DISTRICTS' column contains a list item 'ORANGE UNIFIED SCHOOL DISTRICT'. Below this column is a 'Select All' button. The 'SELECTED 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

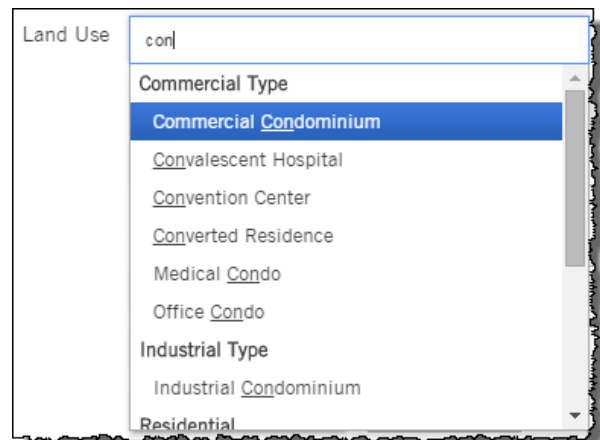
Drop Selection menus will include an “Add More” link which allows the addition of multiple entries from the list into the filter.

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 web interface for searching subdivisions. 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 interface.

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 interface as the previous one, but 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 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 yellow callout with the number "3" points to the "16 CERRO VILLA HEIGHTS" entry in the "AVAILABLE SUBDIVISIONS" list. A yellow callout with the number "4" points to the blue "Apply" button at the bottom right. The "SELECTED SUBDIVISIONS" column now contains one entry: "16 CERRO VILLA HEIGHTS" with a small "x" icon next to it. 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

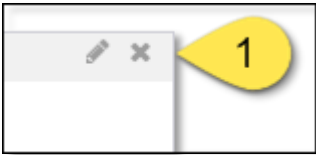
Street Name

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 not

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

Fields:

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 ▲

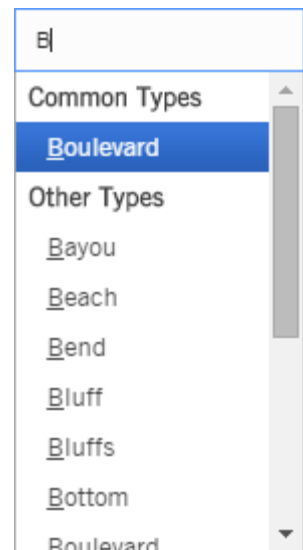
is

is not

starts with

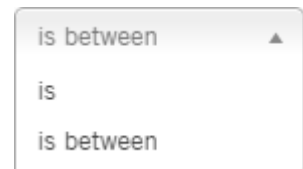
contains

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, there is a search input field containing the letter 'B'. Below the input, the dropdown 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 dropdown list.

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



A screenshot of a web application's unit type dropdown menu. The dropdown is open, showing three options: 'is between', 'is', and 'is between'. The 'is between' option at the top is highlighted with a light gray background. The dropdown has a simple rectangular border and a small upward-pointing arrow on the right side.

Location (Continued)

City	is ▼		+
ZIP Code	is ▼		+
APN	is ▼		+
Tax Area	is ▼		+
Census Tract	is ▼		+
Subdivision	Add More		
Appraisal District	Add More		
Neighborhood Name	Add More		
HOA Name	Add More		
School District	Add More		
Elementary School	Add More		
Middle School	Add More		
High School	Add More		
Carrier Route			+

Fields:

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

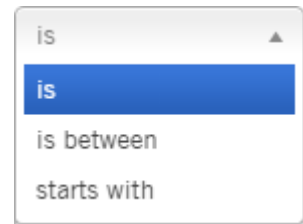
is ▲

is

is not

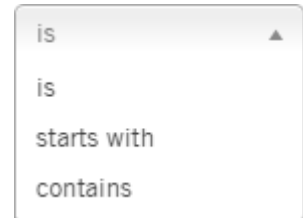
is between

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



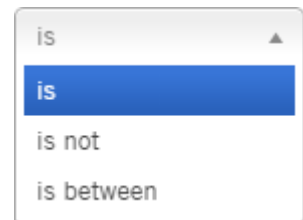
A dropdown menu with a light gray background and a small upward-pointing triangle in the top right corner. It contains four options: 'is' (highlighted in blue), 'is between', and 'starts with'.

Tax Area: Text and numeric entry.



A dropdown menu with a light gray background and a small upward-pointing triangle in the top right corner. It contains four options: 'is', 'starts with', and 'contains'.

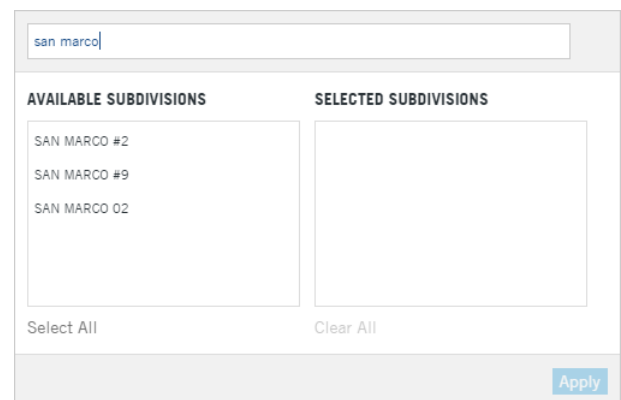
Census Tract: Numeric entry.



A dropdown menu with a light gray background and a small upward-pointing triangle in the top right corner. It contains four options: 'is' (highlighted in blue), 'is not', and 'is between'.

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

NOTE: Not all counties populate the subdivision field.



A search interface for subdivisions. At the top is a text input field containing 'san marco'. Below it are two columns: 'AVAILABLE SUBDIVISIONS' and 'SELECTED SUBDIVISIONS'. The 'AVAILABLE SUBDIVISIONS' column contains a list of three items: 'SAN MARCO #2', 'SAN MARCO #9', and 'SAN MARCO 02'. Below this list is a 'Select All' button. The 'SELECTED SUBDIVISIONS' column is currently empty and has a 'Clear All' button below it. At the bottom right of the interface is an 'Apply' button.

Appraisal District: Numeric value primarily used in the Pacific North West states.

Neighborhood Name: Also known as vanity names.
Uses a Search to Pick List.

HOA Name: Search to pick list.

Both require a State and County selection.

The image shows two overlapping search windows. The top window is for 'Neighborhood Name' with a search bar containing 'coto'. Below the search bar is a list titled 'AVAILABLE NEIGHBORHOODS' with items: COTO DE CAZA, COTO DE CAZA GOLF AND RACQUET CLUB, GRAND COTO ESTATES, GRAND COTO ESTATES SOUTH, and THE GREENS AT COTO. There is a 'Select All' button and a 'Clear' button. The bottom window is for 'HOA Name' with a search bar containing 'regency'. Below the search bar is a list titled 'AVAILABLE HOA' with items: CLAYTON REGENCY PARK, REGENCY OF DANVILLE, REGENCY TOWNHOMES, REGENCY TOWNHOMES HOMEOWNERS A, and THE REGENCY. There is a 'Select All' button and a 'Clear' button. Both windows have an 'Apply' button at the bottom right.

School District, Elementary, Middle and High School:
Search to pick lists.

Requires a specific State and County.

Enter the first few letters of a school district or school name and the list will provide suggestions.

The image shows a search window for 'School District, Elementary, Middle and High School'. It has a search bar containing 'orange'. Below the search bar are two columns: 'AVAILABLE DISTRICTS' and 'SELECTED DISTRICTS'. The 'AVAILABLE DISTRICTS' column contains one item: ORANGE UNIFIED SCHOOL DISTRICT. There is a 'Select All' button below this column. The 'SELECTED DISTRICTS' column is empty. There is a 'Clear All' button below this column. At the bottom right is an 'Apply' button.

Carrier Route: Enter the post office carrier route.

Tract Block Lot and Township Range Section Bundles:
Text and numeric fields. Click Add to Search to add additional bundles.

The image shows a dropdown menu with three options: 'is', 'is', and 'is between'. The second 'is' option is highlighted in blue.

The image shows two forms. The top form is titled 'Tract Block Lot Bundle' and has three rows: 'Tract' with a dropdown menu set to 'is' and a text input field; 'Block' with a dropdown menu set to 'is' and a text input field; and 'Lot' with a dropdown menu set to 'is' and a text input field. The bottom form is titled 'Township Range Section Bundle' and has four rows: 'Township' with a dropdown menu set to 'is' and a text input field; 'Range' with a dropdown menu set to 'is' and a text input field; 'Section' with a dropdown menu set to 'is' and a text input field; and 'Quarter' with a dropdown menu set to 'is' and a text input field.

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

Fields:

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. Requires the selection of a state and county.

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

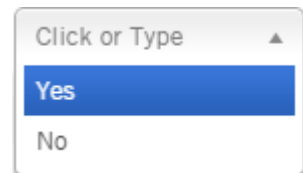
Lot Area: A numeric value.

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.



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

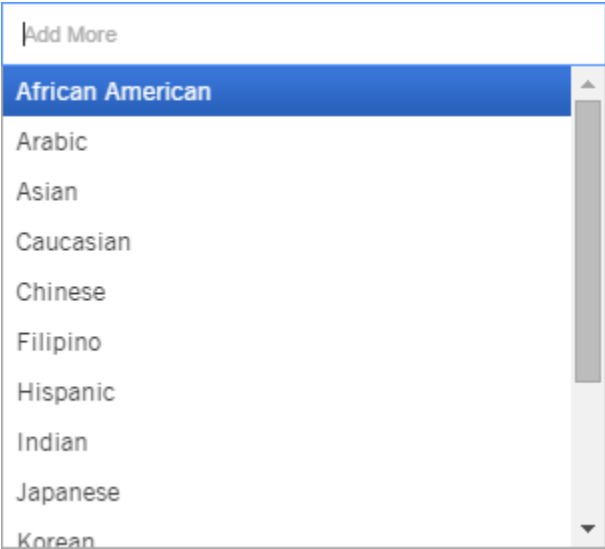
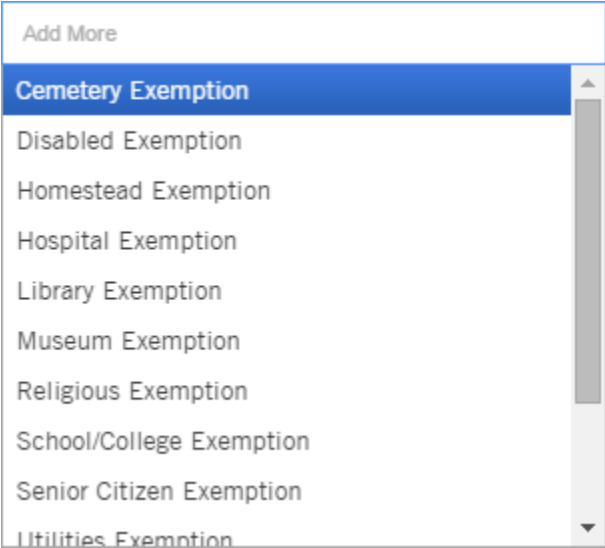
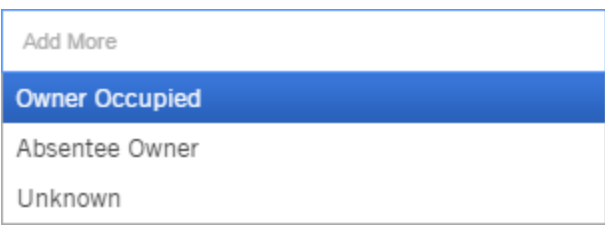
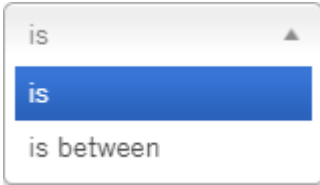
▼

Do Not Mail

Click or Type

▼


Fields:	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 all three options.</p>	
<p>Properties Owned: Specific number or range. 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>

Overview: Owner Mailing Address Bundles

The next four sections provide filters to locate absentee owners.

Property Detail Report 

APN: [REDACTED]

Walnut Creek, CA 94598-1010

Owner Information

Owner Name: [REDACTED]

Vesting: [REDACTED] Trustee

Mailing Address: [REDACTED] Yuma, AZ 85367-9245

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:

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

Fields:

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 ▲

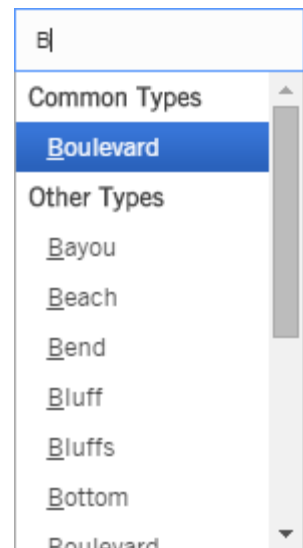
is

is not

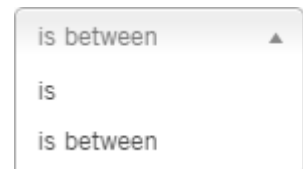
starts with

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.

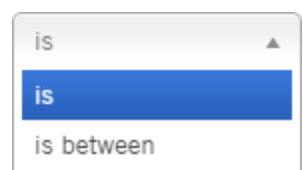
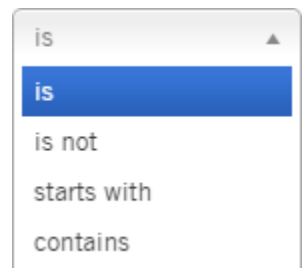


Fields:

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

Fields:
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.

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

Fields:

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)

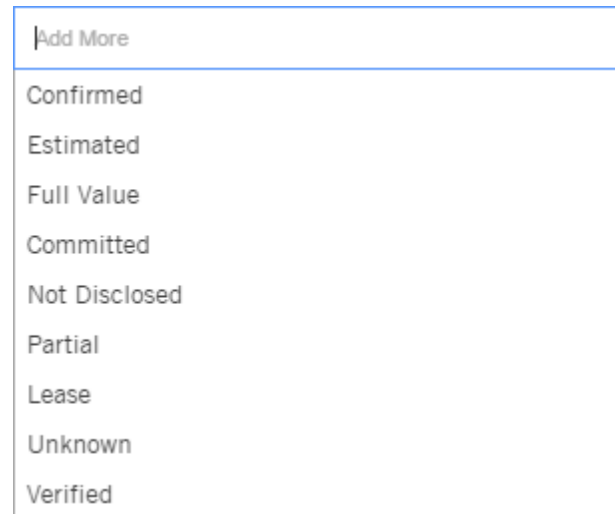
Latest Transaction

is

is

is between

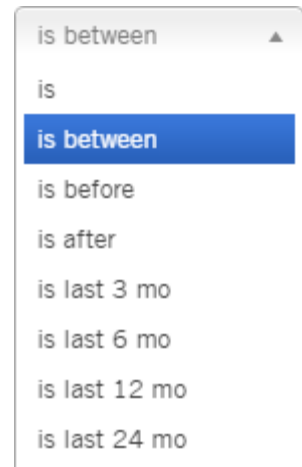
Sales Price Type: A drop-selection of various sales price types from Confirmed to Verified.



A dropdown menu with a light gray header containing the text "Add More". Below the header is a list of sales price types: Confirmed, Estimated, Full Value, Committed, Not Disclosed, Partial, Lease, Unknown, and Verified. The menu has a thin blue border.

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.

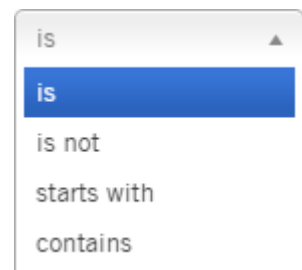


A dropdown menu with a light gray header containing the text "is between" and a small upward-pointing triangle. Below the header is a list of date range options: is, is between (highlighted in blue), is before, is after, is last 3 mo, is last 6 mo, is last 12 mo, and is last 24 mo. The menu has a thin gray border.

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.



A dropdown menu with a light gray header containing the text "is" and a small upward-pointing triangle. Below the header is a list of search options: is (highlighted in blue), is not, starts with, and contains. The menu has a thin gray border.

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

Number of Open Liens

Add More

Select all | Deselect all

Fields:

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

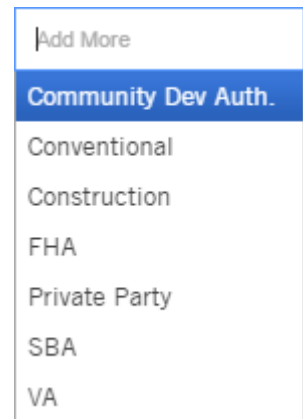
is last 3 mo

is last 6 mo

is last 12 mo

is last 24 mo

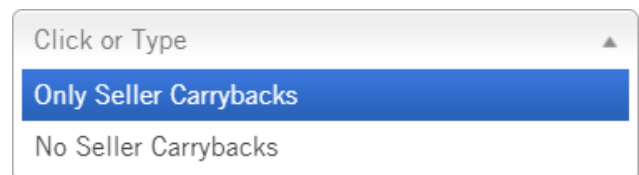
Mortgage Type: Drop-selection of seven mortgage types.



A dropdown menu for Mortgage Type. The menu is open, showing a list of options. The first option is 'Add More' in a light blue bar. Below it is 'Community Dev Auth.' in a dark blue bar, which is currently selected. The remaining options are 'Conventional', 'Construction', 'FHA', 'Private Party', 'SBA', and 'VA', all in white bars.

- Add More
- Community Dev Auth.
- Conventional
- Construction
- FHA
- Private Party
- SBA
- VA

Seller Carryback: Drop selection.

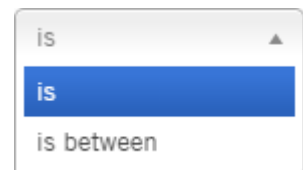


A dropdown menu for Seller Carryback. The menu is open, showing two options. The first option is 'Only Seller Carrybacks' in a dark blue bar, which is currently selected. The second option is 'No Seller Carrybacks' in a white bar.

- Click or Type
- Only Seller Carrybacks
- No Seller Carrybacks

Interest Rate: Numeric input value.

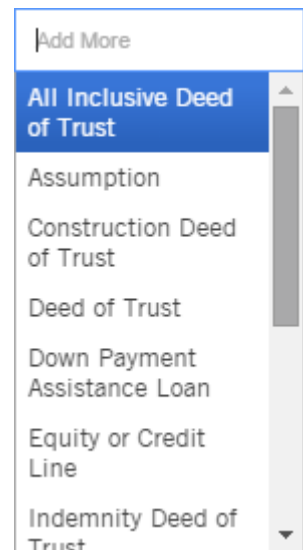
TIP: Interest rates are only available on properties with Adjustable Rate mortgages.



A dropdown menu for Interest Rate. The menu is open, showing three options. The first option is 'is' in a light blue bar. The second option is 'is' in a dark blue bar, which is currently selected. The third option is 'is between' in a white bar.

- is
- is
- is between

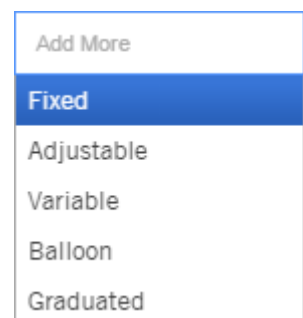
Financing Deed Type: Selections for the type of deed used. Includes options such as Construction Deeds, Loan Modifications, Deeds of Trust, Mortgages, Revolving Line of Credit, etc.



A dropdown menu for Financing Deed Type. The menu is open, showing a list of options. The first option is 'Add More' in a light blue bar. Below it is 'All Inclusive Deed of Trust' in a dark blue bar, which is currently selected. The remaining options are 'Assumption', 'Construction Deed of Trust', 'Deed of Trust', 'Down Payment Assistance Loan', 'Equity or Credit Line', and 'Indemnity Deed of Trust', all in white bars.

- 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.



A dropdown menu for Interest Rate Type. The menu is open, showing a list of options. The first option is 'Add More' in a light blue bar. Below it is 'Fixed' in a dark blue bar, which is currently selected. The remaining options are 'Adjustable', 'Variable', 'Balloon', and 'Graduated', all in white bars.

- Add More
- Fixed
- Adjustable
- Variable
- Balloon
- Graduated

Original Lender Name: Search to pick list.

wells fargo

AVAILABLE 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

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

Select All Clear All

Apply

Number of Open Liens: Drop selection list.

Add More

Free and Clear

1

2

3

4

Finance Scores

Propensity score measuring the likelihood of a homeowner to securing 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

Fields:

- 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

Description

Purchase Intel Score: This is the likelihood of securing a purchase mortgage within the next 3 to 6 months. This can also be used as an indicator of the likelihood of the owner selling the property.

Refi Intel Score Conventional: The propensity that an individual will get a conventional refinance loan within the next 3 to 6 months.

Refi Intel Score FHA: The score indicates the likelihood of getting an FHA Refinance loan within the next 3 to 6 months.

Refi Intel Score Cash-out: This is the propensity of getting a cash-out refinance within the next 3 to 6 months.

Equity Intel Score: The likelihood of getting a home equity line of credit within the next 3 to 6 months.

Each score estimates the likelihood of securing one of those types of mortgages within the next three to six months. For example, the Refi Intel Score Conventional indicates the likelihood of an individual securing a conventional refinance in the next three to six months.

Likelihood

The national average for all propensity scores is 100. In general, the higher score, the more likely the property owner is to open a loan of the particular type. The converse is also true. The scores are generally linear, so a score of 200 indicates that an owner is about twice as likely to get one of the above loans than the national average.

Ranges

Below is a listing of the meaning of the score ranges.

Purchase Intel Score, Refi Intel Score Conventional, Refi Intel Score Cash-out, and Equity Intel Score use the same score range:		Refi Intel Score FHA uses a different score range as FHAs are less common than Conventional Loans.:	
0-100	Below Average Likelihood	0-100	Below Average Likelihood
101-199	Above Average Likelihood	101-199	Above Average Likelihood
200-299	High Likelihood	200-599	High Likelihood
300+	Very High Likelihood	600+	Very High Likelihood

Score Models

The scores are built using proprietary algorithms. They do **not** use non-public, credit-related data, or FCRA-regulated information in their calculations.

PACE Financing

Property Assessed Clean Energy financing is a loan for home energy efficiency improvements. Unlike a regular HELOC, the loan payments are included on the property tax bill.

▼ PACE FINANCING

\$

PACE Loan Type

Add More

Select all | Deselect all

\$

PACE Loan Recording Date

is between ▼

and

\$

PACE Loan Amount

is between ▼

and

Fields:

PACE Loan Type: A drop select listing all available loan types by use. This information is taken from the loan documents. The option includes links for SELECT ALL or DESELECT ALL (In case you added too many).

Additional Information

Add More

Doors/Windows/Skylights

Electric Vehicle Charging System

Fixtures/Appliances

HVAC (Heating, Air Conditioning/Cooling or Both)

Irrigation

Landscaping/Turf

Multiple

PACE Loan Recording Date: Enter a date or date range.

PACE Loan Amount: Numeric value; enter a specific amount or an amount range.

Both filters use Is and Is Between

is ▲

is

is between

Equity

▼ EQUITY

Equity Value

is between ▼

and

Equity %

is between ▼

and

Fields:

Additional Information

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

is ▲

is

is between

Equity Value: An derived estimated dollar value based upon the Estimated Current Value minus the sum of the origination amounts 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? That would depend on the estimated market value and the total of the origination amount of all open liens.

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%

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.

is	▲
is	
is between	

Values follow the same definitions:

Fields:

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.

Market Value

▼ MARKET VALUE

Estimated Value

is between ▼

and

Fields:

Estimated Value: Enter the value or value range. Uses the Is/Is Between operator. The field uses the data from the TitleFlex Automated Valuation Model. The value range from the AVM is also seen in the TotalView Report (shown below).

Owner Information

Owner Name:

Vesting:Married Woman / Sole Owner

Mailing Address:Chandler, AZ 85226-1947

Value Range:\$677,497 - \$1,006,811

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

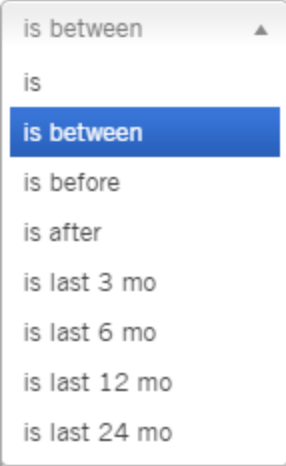
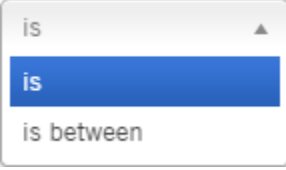
is between

▼

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.</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 an institution 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.</p> <p>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>