



# SALES COMPARABLES

Rev. 201604

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## Overview

This Guide will cover how to modify the sales comparable report to meet your criteria. Additionally, it will cover how to create a sales comparable lists giving you additional control over what is in the final output.

## Using the Sales Comparable Report

The Sales Comparables report will provide you with quick and easy way for retrieving similar sales to your subject parcel. The standard selection criteria are as follows:

Number of Months to Look Back: Six	Distance from Subject: 0.5 Miles
Living Area Difference: +/- 15%	Land Use: Same as Subject

While these might work for 80% of the homes out there, there will be times when you need to modify these parameters to match the subject property more closely. DataTree provides built in flexibility to modify your report parameters to meet any situation.

### Sales Comparables

**2620 San Benito Dr, Walnut Creek, CA 94598**  
APN: 140-281-002-0 Contra Costa County Data as of: 02/17/2017

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**Search Criteria**  
# Months Back: 6 Distance From Subject: 0.5 mi  
Living Area Difference: 15.0 +/- Land Use: Same As Subject [ADVANCED CRITERIA](#)

**9 Comparable Properties Found**

COMPARABLES												
#	MI	ST	Address	Sold	Sold For	Listed	Listed At	Sq. Ft.	\$ / Sq. Ft.	Bds / Bths	Lot Size	Age
1	0.13		277 El Divisadero Ave, 94598	11/29/2016	\$959,000			1,628	\$589	4 / 2	9,200	57
2	0.13		220 Los Banos Ave, 94598	02/07/2017	\$817,000			1,946	\$420	3 / 2	7,500	61
3	0.16		209 San Antonio Way, 94598	11/02/2016	\$815,000			1,712	\$476	4 / 2	7,500	62
4	0.18		2609 San Antonio Dr, 94598	09/28/2016	\$930,000			1,722	\$540	3 / 2	6,800	61
5	0.18		2741 San Benito Dr, 94598	07/21/2016	\$945,000			1,648	\$573	3 / 2	8,250	58
6	0.20		176 Warwick Dr, 94598	11/08/2016	\$925,000			2,031	\$455	4 / 2	10,449	58
7	0.24		316 Pickering Pl, 94598	11/11/2016	\$900,000			1,958	\$460	4 / 2	9,430	58
8	0.40		2868 San Carlos Dr, 94598	08/02/2016	\$900,000			1,825	\$493	4 / 2	7,700	37
9	0.42		475 Fenway Dr, 94598	09/01/2016	\$915,000			2,076	\$441	4 / 2	13,500	55

L: Listed R: REO RS: REO Sale SS: Short Sale D: Default A: Auction

**COMPARABLE PROPERTY SUMMARY**

In the example above, the report provides comparables for the subject property. However, this property is a “Mid-Century Modern” and, in this case, is an Eichler home built in 1957.

Given the unique architectural style of Eichler homes, a careful researcher will have to modify the report parameters to ensure that only architecturally similar homes are used.





*Eichler Home (left)*



*Contemporary Ranch Home (right)*

Using the stock parameters, you may end up mixing in the wrong style of homes. Using the above previous example, this is the accompanying map for the sales comparable report:



Using the Edit Criteria button at the top right hand side of the report, you can adjust the parameters of the report to include bedroom or bathroom counts, square footage, land use, and even the geographic footprint used for the comparables search.

**Search Criteria**

# Months Back: 6 Distance From Subject: 0.5 mi  
 Living Area Difference: Same As Subject

**9 Comparable Properties Found**

[Edit Criteria](#) [Export](#)

Clicking the Advanced Criteria button will open the Filters for the Sales Comparable report, as shown here. A key for some of the more common fields is below.

**Filters**

1 # Months Back 6

2 Distance From Subject 0.5 [Draw It](#)

3 Living Area Difference % 15

4 Sale Date 02/01/2018 - 08/22/2018

5 Style Click or Type

6 Living Area is between 1623 and 2196

7 Land Use Same As Subject: Same As Subject X

Bedrooms is between and  
 Bathrooms is between and  
 Lot Area is between and  
 Lot Acreage is between and  
 Stories is between and  
 Pool No Preference  
 Year Built is between and  
 Geographic Options Click or Type

Listed Properties Exclude  
 Listed Price is between and  
 Foreclosures Include  
 Distressed Sales Click or Type

[Cancel](#) [Apply Changes](#) [View Report](#)

1. Look back period can be set by number of months or by a date range
2. The distance in tenths of a mile. By default, this is a radius. If you click “Use Drawing Tools” this will clear the drawn circle and allow you the option of using the Polygon or Freehand drawing tools to inscribe a specific geographic area to capture only architecturally similar homes. See the Appendix at the end of this document for an example.
3. Living Area: Percentages or by a defined square footage.
4. Land use code: Change the land use code in this field.

5. Style: A drop select menu that contains a number of architectural styles. It is dependent upon County Assessor information, which can vary dependent upon the county. See the Appendix at the end of the document for a list of included styles.

Additional common physical characteristics can be included, such as Bedrooms, Bathroom, Number of Stories, and Lot Area.

Once your changes are completed, click the Apply Changes button to re-filter the report and then click View Report to render the report with the revised filters.

**TIP:** Remember that if you change the geography, you may have to change the number of months back or other filter options to ensure that you still have enough comparables. Your business rules will dictate the filters used for the sales comparables.



## Using the Map and Filters to Create a Sales Comparable List:

This method simply employs the interactive map and filters to create your list.

*For more information on Filters, see the Filter Catalog guide..*

### Set Your Geography:

Using either the Location filters or the map, set the geography for your list.

The screenshot displays the 'ADVANCED SEARCH' interface. On the left, the 'LOCATION' section is expanded, showing filters for 'State & County Bundle' (State: California, County: is) and 'Address Bundle' (Street #: even range, 200 and 600; Pre Direction: N; Street Name: is, Walnut; Street Type: Common Types - Avenue; Post Direction: Add More; Unit #: is). On the right, a summary of the selected filters is shown, including 'STATE & COUNTY BUNDLE' (State: California, County: is) and 'LOCATION' (Address Bundle: Street #: 100 - 600, Pre Direction: N, Street Name: Firestone, Street Type: Boulevard). Below the filters, a map of a residential area is shown with several blue-outlined polygons indicating the selected geography. A 'DRAWING TOOLS' menu is overlaid on the map, showing options for 'FREEHAND', 'POLYGON', and 'RADIUS'. The map also shows various street names like San Antonio Way, Los Banos Ave, Los Cerros Ave, and San Carlos Dr.

Remember that you can use more than one drawing tool and combine areas. If you wish to describe more than one area, simply click the drawing tool again, draw the area, and repeat the process. When you have all the areas defined, click Apply. Do not click Apply until you are finished.

## Set Your Characteristics Filters:

Click on the Characteristics tab and enter any property characteristics that match your subject property.

The screenshot shows the 'ADVANCED SEARCH' interface. At the top, there's a 'Jump to:' dropdown set to 'Top' and a 'Form:' dropdown set to 'All Filters'. Below this is the 'CHARACTERISTICS' section with various filters: Land Use, County Land Use, Zoning Code, Site Influence, Year Built, Living Area (Sq. Ft.), Bedrooms, Bathrooms, Total Rooms, Lot Area, Lot Acreage, Stories, Pool, Garage Spaces, and # of Units. Each filter has a dropdown menu for operators (e.g., 'is between', 'is') and input fields for values. To the right, there's a 'STATE & COUNTY BUNDLE' section with 'State' set to 'California' and 'County' set to 'Santa Clara'. Below that is a 'LOCATION' section with two 'ADDRESS BUNDLE' entries. The first bundle has 'Street #' set to '100 - 600', 'Pre Direction' set to 'N', 'Street Name' set to 'Firestone', and 'Street Type' set to 'Boulevard'. The second bundle has 'Street #' set to '200 - 600', 'Pre Direction' set to 'N', 'Street Name' set to 'Walnut', and 'Street Type' set to 'Avenue'. At the top right, it says '53 results' with a 'View Results' button and a 'Get Count' link. At the bottom right, there's a 'Clear All' button.

Remember that the different fields provide operators, which allow for a specific search (IS), or ranges (IS BETWEEN). Example:

This close-up shows three filter rows. The first row is 'Bedrooms' with the operator 'is' and the value '5'. The second row is 'Bathrooms' with the operator 'is between' and the values '4' and '6'. The third row is 'Total Rooms' with the operator 'is' and two empty input fields. A dropdown menu is open for the 'Total Rooms' filter, showing the options 'is' and 'is between', with 'is between' highlighted in blue.

**TIP:** As a best practice, each time you add a filter option, click the Get Count link so you can see how many properties that filter removes. This will allow you to tailor your list more carefully. If you add all your filters at once and then click View Results, and end up with only a few records, it will not be immediately apparent which filter is causing the possible problem.



## Set Your Sale Information Filters:

This section will allow you to filter by the last sales date of the properties. Following the idea of a custom-built sales comparable report, you might select “in the last 6 mo” as the filter.

The screenshot shows the 'SALE INFORMATION' filter section. It includes fields for Sale Price, Sale Price Type, Last Sale Date, Last Sale Recording Date, Recording Month, Seller Name, Transaction Type, and Transaction Deed Type. The 'Last Sale Date' dropdown menu is open, showing options: 'is between', 'is', 'is between' (highlighted), 'is before', 'is after', 'is last 3 mo', 'is last 6 mo', 'is last 12 mo', and 'is last 24 mo'. The 'Transaction Deed Type' field has 'Select all' and 'Deselect all' links.

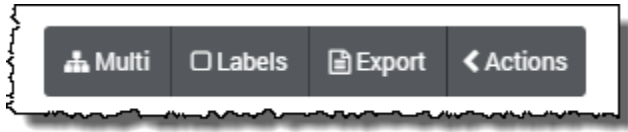
## Set Your Owner Filters:

The owner filters include the “Owner Occupied” filter allowing you to specify Absentee vs Owner Occupied homes as well as mailing information and Do Not Mail flags.

The screenshot shows the 'OWNER' filter section. It includes fields for Owner Last Name, Owner First Name, Owner (Other), Owner Ethnicity, Exemption, Owner Occupied, and Do Not Mail. The 'Owner Occupied' dropdown menu is open, showing options: 'Add More', 'Owner Occupied' (highlighted), 'Absentee Owner', and 'Unknown'. The 'Do Not Mail' field has a dropdown menu with options: 'Click or Type', 'Include' (highlighted), and 'Exclude'.

## Generating Your List:

Once you have your list of comparables, you can create a multi-line report, print labels, or export it into an Excel file (CSV format).



As mentioned earlier, please see the Filter How To Guide for more information on each section of the filters.

## Reference:

For additional reference, see the following How-To Guides:

1. Filter Catalog
2. Farming Guides
3. Proximity and Subdivision Searches Guide.