

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

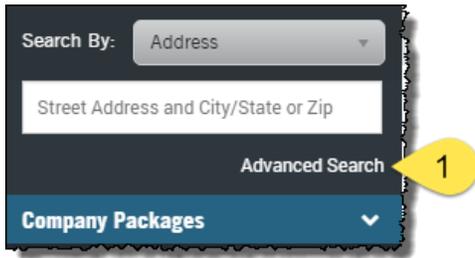
Tax Information			
Assessed Year:	2018	Assessed Value:	\$327,399
Tax Year:	2018	Land Value:	\$87,942
Tax Area:	9-036	Improvement Value:	\$239,457
Property Tax:	\$4,254.46	Improved %:	73.14%
Exemption:	Homestead	Delinquent Year:	
		Market Total Value:	
		Market Land Value:	
		Market Imprv Value:	
		Market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

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

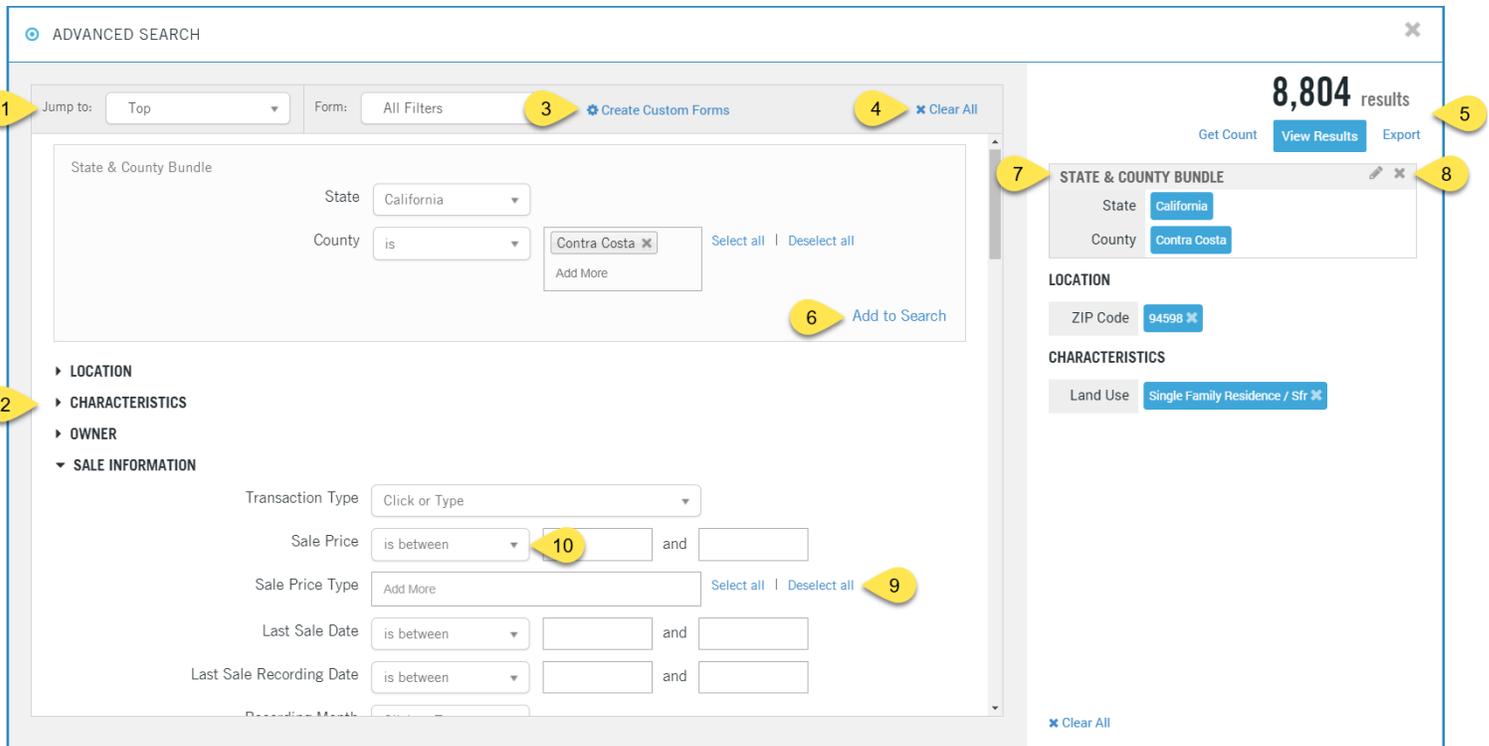
## Getting Started

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.



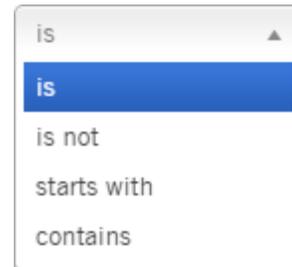
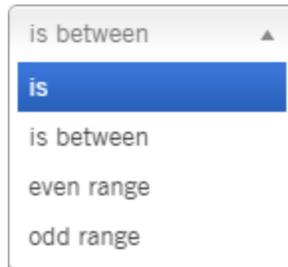
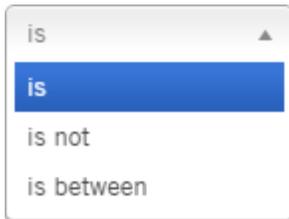
1. **Jump To:** Use to jump to a specific filter groups (2). You can also use the scroll bar to the right of the filters to scroll through the whole list.

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 text input field containing 'Year Built', a dropdown menu with 'is between' selected, two numeric input fields containing '1965' and '1975', and the word 'and' between them.

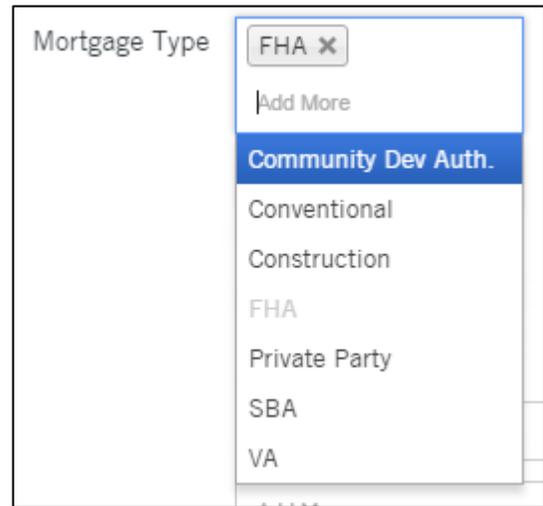
1. Operators with user defined entries

Single Entry:



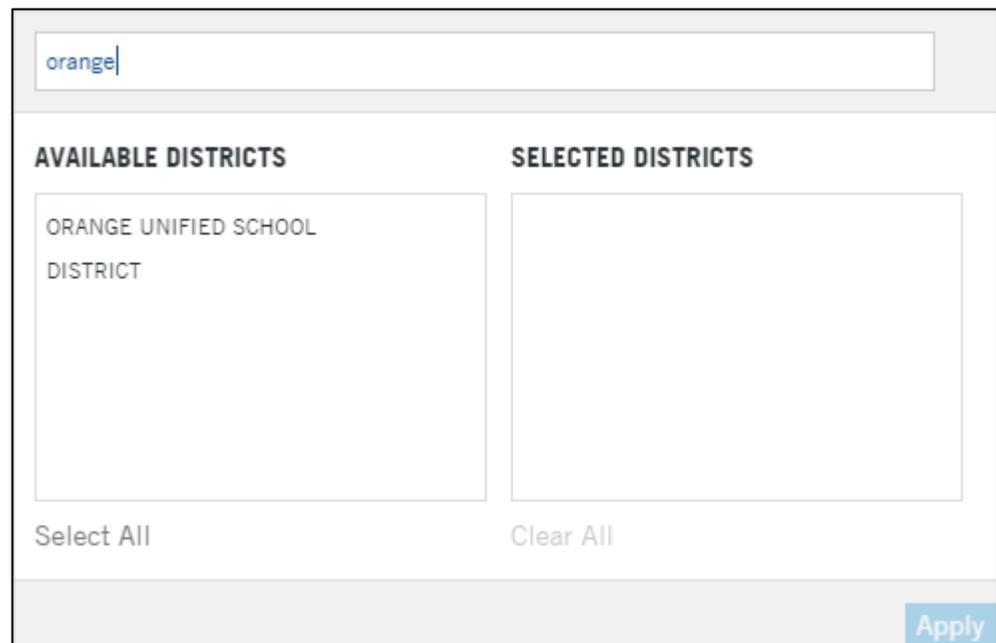
A single entry filter interface for 'Year Built'. It consists of a text input field containing 'Year Built', a dropdown menu with 'is' selected, and a single numeric input field containing '1975'.

2. Drop Selection menus



A drop selection menu for 'Mortgage Type'. The menu is open, showing a list of options: 'FHA' (with a close button 'x'), 'Add More', 'Community Dev Auth.' (highlighted in blue), '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 input field containing 'orange'. Below it are two columns: 'AVAILABLE DISTRICTS' and 'SELECTED DISTRICTS'. The 'AVAILABLE DISTRICTS' column contains one entry: '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

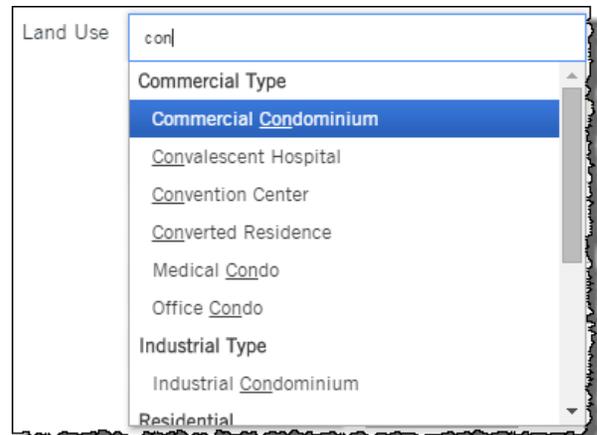
Drop Selection menus will include an “Add More” link which allows the addition of multiple entries from the list into the filter.

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 'Subdivision' search interface. At the top left is the label 'Subdivision' and an 'Add More' button. Below this is a search input field with the placeholder text 'Type to search'. The main area is divided into two columns: 'AVAILABLE SUBDIVISIONS' on the left and 'SELECTED SUBDIVISIONS' on the right. Both columns are currently empty. 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 'Subdivision' search interface as above, but with annotations. A yellow callout bubble with the number '1' points to the search input field, which now contains the text 'villa'. A second yellow callout bubble 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 third yellow callout bubble with the number '3' points to the '16 CERRO VILLA HEIGHTS' entry in the 'AVAILABLE SUBDIVISIONS' list, which has been moved to the 'SELECTED SUBDIVISIONS' column. The 'SELECTED SUBDIVISIONS' column now contains '16 CERRO VILLA HEIGHTS' with a small 'x' icon to its right. A fourth yellow callout bubble with the number '4' points to the 'Apply' button at the bottom right.

## 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:

The screenshot displays the 'LOCATION' filter panel in edit mode. On the left, the 'Address Bundle' section contains the following fields: 'Street #' with a dropdown set to 'is between' and input boxes for '500' and '650'; 'Pre Direction' with an 'Add More' button and 'Select all | Deselect all' links; 'Street Name' with a dropdown set to 'is' and an input box containing 'Washington'; 'Street Type' with a dropdown set to 'Common Types : Avenue' (with an 'x' icon), an 'Add More' button, and 'Select all | Deselect all' links; and 'Post Direction' with an 'Add More' button and 'Select all | Deselect all' links. At the bottom, 'Unit #' has a dropdown set to 'is between' and two empty input boxes. An 'Add to Search' button is located at the bottom right of this section. On the right, the 'STATE & COUNTY BUNDLE' shows 'State' as 'California' and 'County' as 'Orange'. Below it, the 'LOCATION' section contains an 'ADDRESS BUNDLE' with 'Street #' as '500 - 650', 'Street Name' as 'Washington', and 'Street Type' as 'Avenue'.

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

Figure 2:

The screenshot shows a web interface for defining a location. On the left, under the heading 'LOCATION', there is an 'Address Bundle' section with several input fields: 'Street #' (set to 'is between'), 'Pre Direction' (with an 'Add More' button and 'Select all | Deselect all' links), 'Street Name' (set to 'is'), 'Street Type' (with an 'Add More' button and 'Select all | Deselect all' links), 'Post Direction' (with an 'Add More' button and 'Select all | Deselect all' links), and 'Unit #' (set to 'is between'). An 'Add to Search' button is located at the bottom right of this section. On the right side, there is a summary panel with two sections: 'STATE & COUNTY BUNDLE' showing 'State: California' and 'County: Orange', and 'LOCATION' showing 'ADDRESS BUNDLE' with 'Street #: 500 - 650', 'Street Name: Washington', and '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.

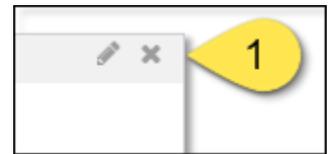
Figure 3

This screenshot shows the same 'LOCATION' form as Figure 2, but with the 'Address Bundle' section populated. The 'Street #' field now contains '200' and '700'. The 'Street Name' field contains 'Firestone'. The 'Street Type' dropdown menu is open, showing 'Common Types: Drive' selected. The 'Add to Search' button remains at the bottom right. The summary panel on the right has been updated: 'STATE & COUNTY BUNDLE' now shows 'County: not Contra Costa', and the 'LOCATION' section shows two 'ADDRESS BUNDLE' entries. The first entry is 'Street #: 500 - 650', 'Street Name: Washington', 'Street Type: Avenue'. The second entry is '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

Edit or remove a completed bundle by clicking on the pencil or “x”, respectively.

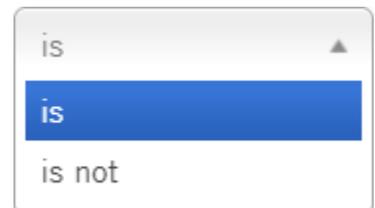


## State and County Bundle

This is a stand-alone bundle at the top of the list.

**State:** 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.



# Location Filters

## Address Bundle

▼ LOCATION

Address Bundle 

Street #  and

Pre Direction  [Select all](#) | [Deselect all](#)

Street Name

Street Type  [Select all](#) | [Deselect all](#)

Post Direction  [Select all](#) | [Deselect all](#)

Unit #

[Add to Search](#)

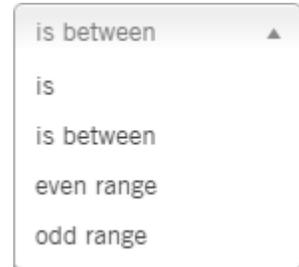
### Fields:

**Street Number:** Includes the operators for single numbers, ranges and odd/even ranges.

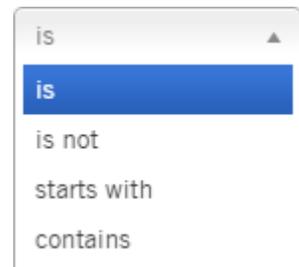
**Pre Direction and Post Direction:** A drop down list selection for all compass points (N, NE, E, SE, etc).

**Street Name:** Do not include pre- or post-directionals.

### Additional Information:

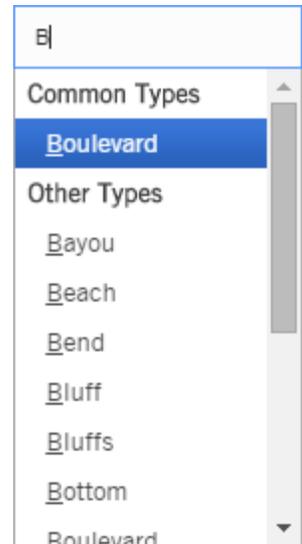


is between ▲  
is  
is between  
even range  
odd range

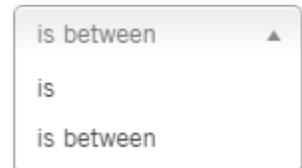


is ▲  
**is**  
is not  
starts with  
contains

**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.



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



## Location (Continued)

City	is	<input type="text"/>	+
ZIP Code	is	<input type="text"/>	+
APN	is	<input type="text"/>	+
Tax Area	is	<input type="text"/>	+
Census Tract	is	<input type="text"/>	+
Subdivision	<input type="text" value="Add More"/>		
Appraisal District	<input type="text" value="Add More"/>		
Neighborhood Name	<input type="text" value="Add More"/>		
HOA Name	<input type="text" value="Add More"/>		
School District	<input type="text" value="Add More"/>		
Elementary School	<input type="text" value="Add More"/>		
Middle School	<input type="text" value="Add More"/>		
High School	<input type="text" value="Add More"/>		
Carrier Route	<input type="text"/>		+

### Fields:

**City:** Text entry only; operators will allow for partial matches.

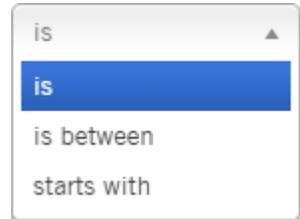
**Zip Code:** Numeric entry; operators will allow for ranges and exclusions.

### Additional Information:

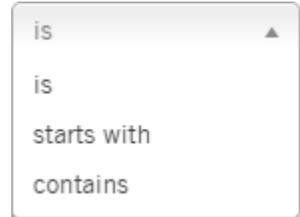
A dropdown menu for the City field showing the following operators: 'is' (selected), 'is not', 'starts with', and 'contains'.

A dropdown menu for the Zip Code field showing the following operators: 'is' (selected), 'is not', and 'is between'.

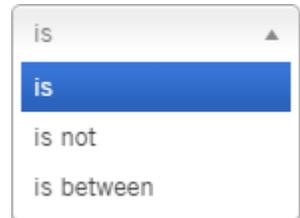
**APN:** Text and numeric entry; the APN can be formatted or unformatted and the field will search the alternate APNs.



**Tax Area:** Text and numeric entry.

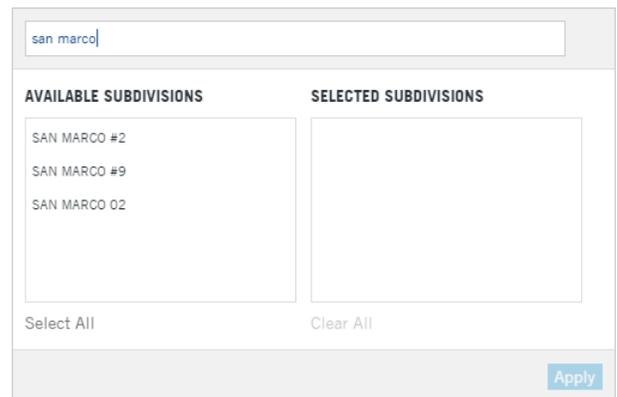


**Census Tract:** Numeric entry.



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

NOTE: Not all counties populate the subdivision field.



**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 screenshot shows two search panels. The top panel is for 'Neighborhood Name' with a search input containing 'coto'. Below the input is a list of 'AVAILABLE NEIGHBORHOODS' including 'COTO DE CAZA', 'COTO DE CAZA GOLF AND RACQUET CLUB', 'GRAND COTO ESTATES', 'GRAND COTO ESTATES SOUTH', and 'THE GREENS AT COTO'. There are 'Select All' and 'Clear' buttons. The bottom panel is for 'HOA Name' with a search input containing 'regency'. Below the input is a list of 'AVAILABLE HOA' including 'CLAYTON REGENCY PARK', 'REGENCY OF DANVILLE', 'REGENCY TOWNHOMES', 'REGENCY TOWNHOMES HOMEOWNERS A', and 'THE REGENCY'. There are 'Select All' and 'Clear' buttons. Both panels have an 'Apply' button at the bottom.

**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 screenshot shows a search interface for 'School District'. The search input contains 'orange'. Below the input are two columns: 'AVAILABLE DISTRICTS' and 'SELECTED DISTRICTS'. The 'AVAILABLE DISTRICTS' column contains 'ORANGE UNIFIED SCHOOL DISTRICT'. There are 'Select All' and 'Clear All' buttons. An 'Apply' button is at the bottom right.

**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 screenshot shows a dropdown menu with the following options: 'is', 'is', and 'is between'. The second 'is' option is highlighted in blue.

The screenshot shows two forms. The 'Tract Block Lot Bundle' form has three rows: 'Tract' with a dropdown set to 'is' and an empty text field; 'Block' with a dropdown set to 'is' and an empty text field; and 'Lot' with a dropdown set to 'is' and an empty text field. The 'Township Range Section Bundle' form has four rows: 'Township' with a dropdown set to 'is' and an empty text field; 'Range' with a dropdown set to 'is' and an empty text field; 'Section' with a dropdown set to 'is' and an empty text field; and 'Quarter' with a dropdown set to 'is' and an empty text field.

## Characteristics Filters

▼ **CHARACTERISTICS**

Land Use	<input type="text" value="Add More"/>	<a href="#">Select all</a>   <a href="#">Deselect all</a>
County Land Use	<input type="text" value="Add More"/>	
Zoning Code	<input type="text" value="is between"/> ▼ <input type="text"/> and <input type="text"/>	<input type="text" value=""/>
Site Influence	<input type="text" value="Add More"/>	<a href="#">Select all</a>   <a href="#">Deselect all</a>
Year Built	<input type="text" value="is between"/> ▼ <input type="text"/> and <input type="text"/>	<input type="text" value=""/>
Living Area (Sq. Ft.)	<input type="text" value="is between"/> ▼ <input type="text"/> and <input type="text"/>	<input type="text" value=""/>
Bedrooms	<input type="text" value="is between"/> ▼ <input type="text"/> and <input type="text"/>	<input type="text" value=""/>
Bathrooms	<input type="text" value="is between"/> ▼ <input type="text"/> and <input type="text"/>	<input type="text" value=""/>
Total Rooms	<input type="text" value="is between"/> ▼ <input type="text"/> and <input type="text"/>	<input type="text" value=""/>
Lot Area	<input type="text" value="is between"/> ▼ <input type="text"/> and <input type="text"/>	<input type="text" value=""/>
Lot Acreage	<input type="text" value="is between"/> ▼ <input type="text"/> and <input type="text"/>	<input type="text" value=""/>
Stories	<input type="text" value="is between"/> ▼ <input type="text"/> and <input type="text"/>	<input type="text" value=""/>
Pool	<input type="text" value="Click or Type"/> ▼	
Garage Spaces	<input type="text" value="is between"/> ▼ <input type="text"/> and <input type="text"/>	<input type="text" value=""/>
# of Units	<input type="text" value="is between"/> ▼ <input type="text"/> and <input type="text"/>	<input type="text" value=""/>

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.

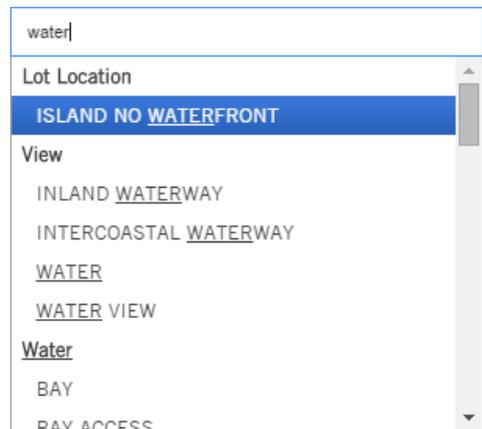
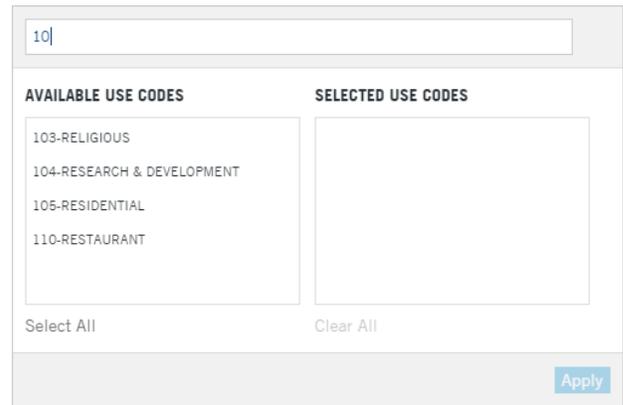
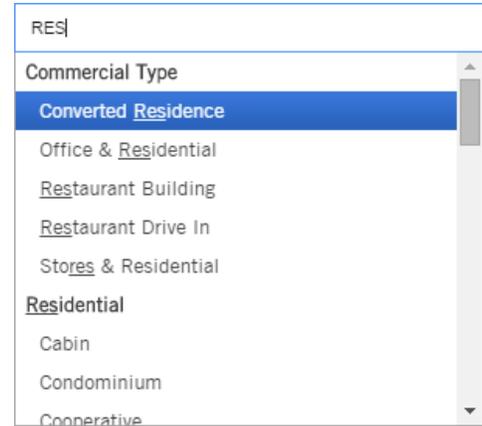
**Site Influence** Is a drop selection. Each selection has more types in a cascade menu.

**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:**



**Bedrooms, Bathrooms, Total Rooms:** All take numeric input values that can also be done as a range search

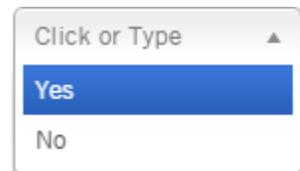
**Lot Area:** A numeric value.

**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.



**# of Units:** Takes a numeric value.

## Owner

▼ OWNER

Owner Last Name   +

Owner First Name   +

Owners (All)   +

Owner Ethnicity  [Select all](#) | [Deselect all](#)

Exemption  [Select all](#) | [Deselect all](#)

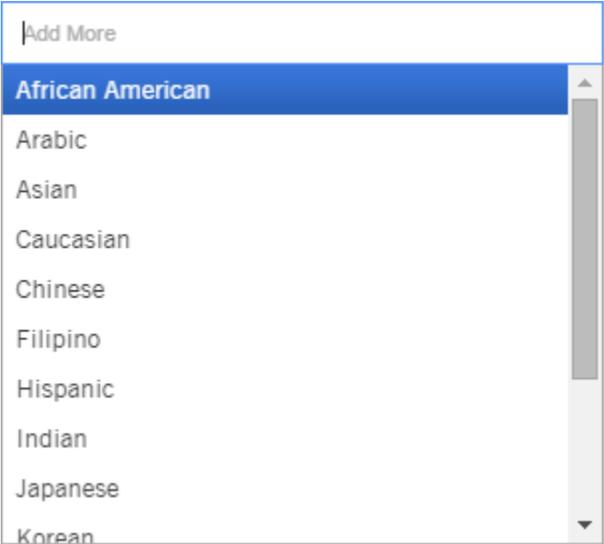
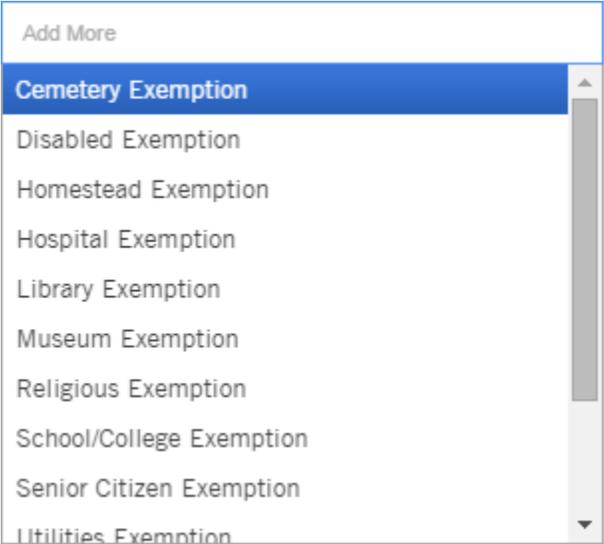
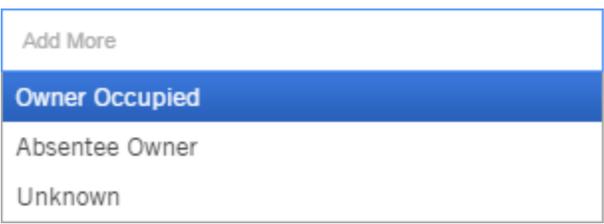
Owner Occupied  [Select all](#) | [Deselect all](#)

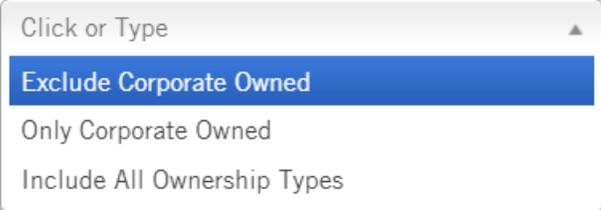
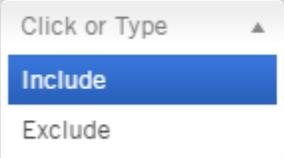
 Properties Owned   and

Corporate Owned

Do Not Mail

Fields:	Additional Notes:
<p><b>Owner Last Name, Owner First Name and Owner (Other):</b> Alpha characters.</p>	<div data-bbox="1177 1134 1461 1396"> <input type="text" value="is"/> ▲  <span style="background-color: #0056b3; color: white; padding: 2px;">is</span>            is not            starts with            contains         </div>

<p><b>Owner Ethnicity:</b> Drop-selection of 14 ethnic types.</p>	
<p><b>Exemption</b> is a drop-selection of 13 exemption types.</p>	
<p><b>Owner Occupied:</b> Drop select field. Leave blank to include all three options.</p>	
<p><b>Properties Owned:</b> 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>	

<p><b>Corporate Owned:</b> Drop selection field.</p>	
<p><b>Do Not Mail:</b> Drop-selection; leave blank to include all records regardless of Do Not Mail flag.</p>	

## Overview: Owner Mailing Address Bundles

The next four sections provide filters to locate absentee owners.

### Property Detail Report

**Walnut Creek, CA 94598-1010**

APN: [REDACTED]

---

#### Owner Information

Owner Name: [REDACTED]

Vesting: Trustee

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



## Owner – Mailing State and County Bundle

Mailing State & County Bundle

Mailing State

Mailing County   [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 #  and

Mailing Pre Direction  [Select all](#) | [Deselect all](#)

Mailing Street Name

Mailing Street Type  [Select all](#) | [Deselect all](#)

Mailing Post Direction  [Select all](#) | [Deselect all](#)

Mailing Unit #

[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).

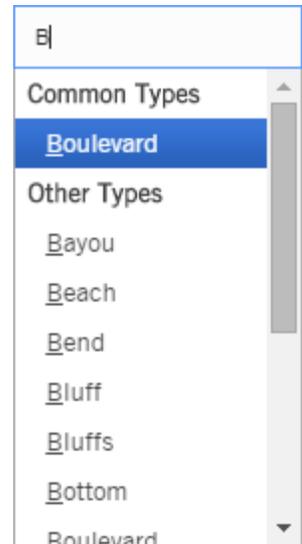
**Mailing Street Name:** Do not include pre- or post-directionals in this field.

### Additional Information:

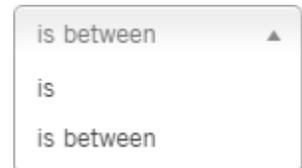
▲  
is  
is between  
even range  
odd range

▲  
**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.

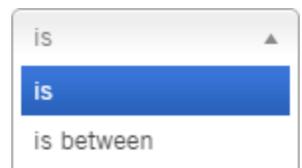
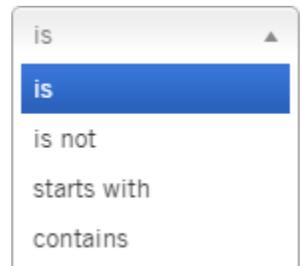
Mailing City	is	<input type="text"/>	+
Mailing ZIP Code	is	<input type="text"/>	+

**Fields:**

**City:** Text entry only.

**Zip Code:** Numeric entry.

**Additional Information:**



## Owner – International Mailing Bundle

International Mailing Bundle

Mailing Country  [Select all](#) | [Deselect all](#)

Canadian Mailing Province   [Select all](#) | [Deselect all](#)

Canadian Mailing City

Canadian Mailing Postal Code

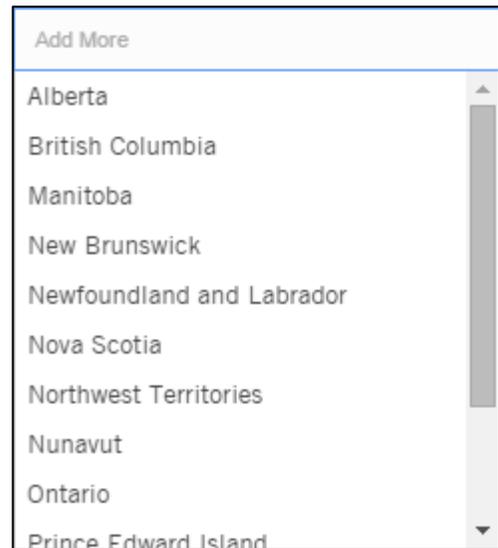
[Add to Search](#)

### 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:

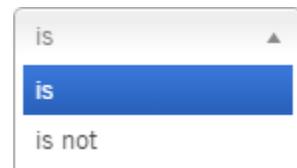
**Canadian Mailing Provinces:** Drop select list.



**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.



## Sale Information:

▼ **SALE INFORMATION**

Transaction Type

Sale Price   and

Sale Price Type  [Select all](#) | [Deselect all](#)

Last Sale Date   and

Last Sale Recording Date   and

Recording Month

Seller Name   +

Transaction Deed Type  [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)

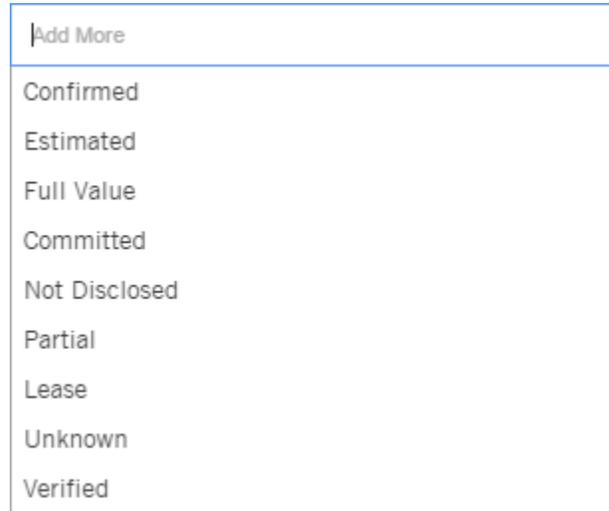
Latest Transaction

is ▲

is

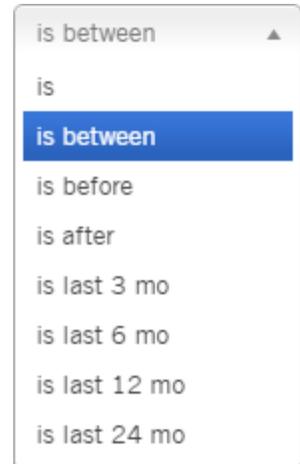
is between

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



- Add More
- Confirmed
- Estimated
- Full Value
- Committed
- Not Disclosed
- Partial
- Lease
- Unknown
- Verified

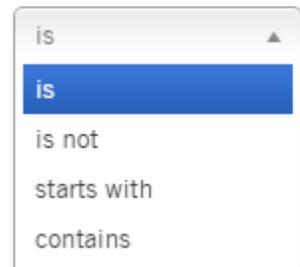
**Last Sale Date and Last Sale Recording Date:** Drop-selections for the Last 3, 6, 12 and 24 Months. Custom dates are allowed.



- 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

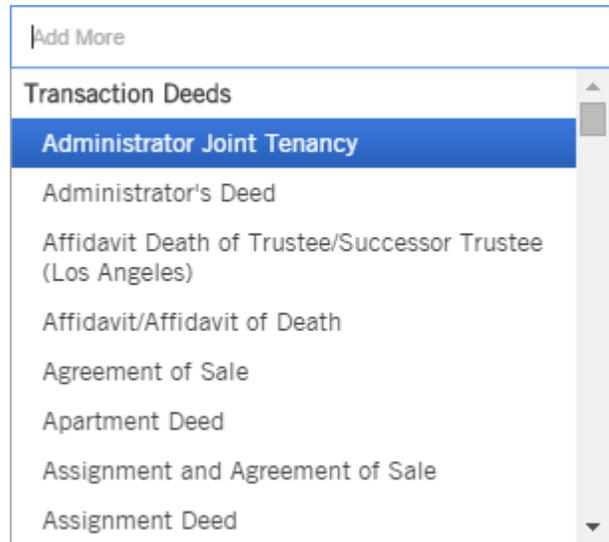
**Recording Month:** Drop-selection of any one of twelve months.

**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.



## Financing Information

**▼ FINANCING INFORMATION**

Mortgage Amount  and

Mortgage Recording Date  and

Mortgage Type  [Select all](#) | [Deselect all](#)

Seller Carryback

Interest Rate  and

Financing Deed Type  [Select all](#) | [Deselect all](#)

Interest Rate Type  [Select all](#) | [Deselect all](#)

Original Lender Name

Title Company

Number of Open Liens  [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

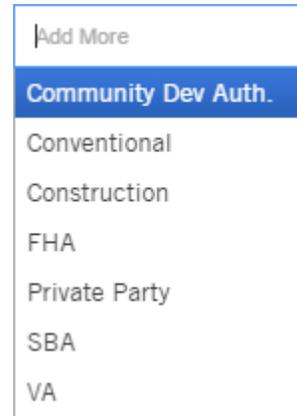
is last 3 mo

is last 6 mo

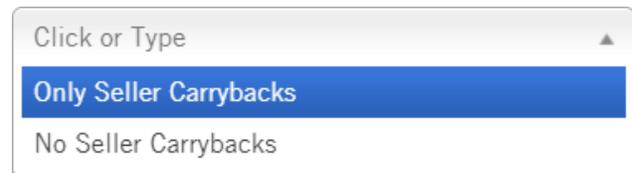
is last 12 mo

is last 24 mo

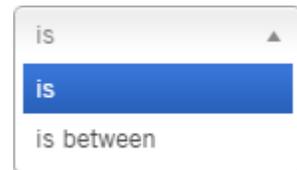
**Mortgage Type:** Drop-selection of seven mortgage types.



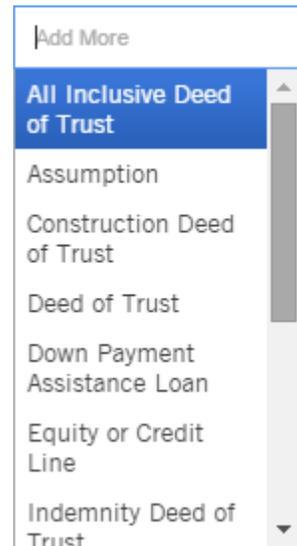
**Seller Carryback:** Drop selection.



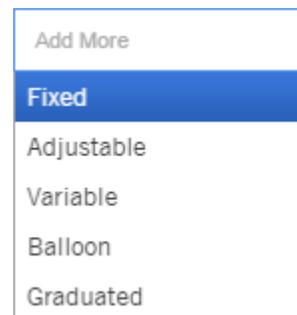
**Interest Rate:** Numeric input value.  
**TIP:** Interest rates are only available on properties with Adjustable Rate mortgages.



**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.



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

**SELECTED LENDERS**

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

**SELECTED TITLE COMPANIES**

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	<input type="text" value="Add More"/>	<a href="#">Select all</a>   <a href="#">Deselect all</a>
 Refi Intel Score Conventional	<input type="text" value="Add More"/>	<a href="#">Select all</a>   <a href="#">Deselect all</a>
 Refi Intel Score FHA	<input type="text" value="Add More"/>	<a href="#">Select all</a>   <a href="#">Deselect all</a>
 Refi Intel Score Cash-out	<input type="text" value="Add More"/>	<a href="#">Select all</a>   <a href="#">Deselect all</a>
 Equity Intel Score	<input type="text" value="Add More"/>	<a href="#">Select all</a>   <a href="#">Deselect all</a>

### 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

<input type="text" value="Add More"/>
<b>Very High Likelihood</b>
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.

<b>Purchase Intel Score, Refi Intel Score Conventional, Refi Intel Score Cash-out, and Equity Intel Score</b> use the same score range:		<b>Refi Intel Score FHA</b> 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  [Select all](#) | [Deselect all](#)

🇺🇸 PACE Loan Recording Date  and

🇺🇸 PACE Loan Amount  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.

is

is

is between

Both filters use Is and Is Between

## Equity

▼ EQUITY

Equity Value  and

Equity %  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   and

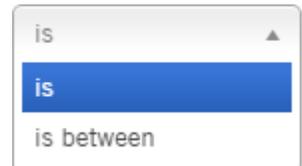
Equity %   and

## 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.



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  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  [Select all](#) | [Deselect all](#)

Listing Date  and

Listing Price  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

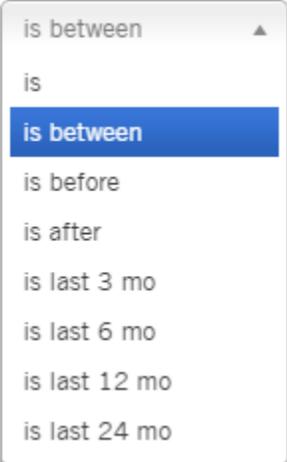
Foreclosure Status

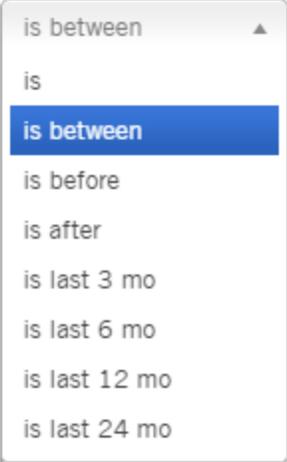
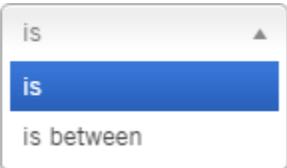
Foreclosure Recorded Date   and

Foreclosure Event Date   and

Foreclosure Amount   and

[Add to Search](#)

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

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

## HOA Lien

▼ HOA LIEN

\$ Open HOA Lien Present
 Click or Type ▼

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