

DataTree[®] ACADEMY

RETRIEVING DOCUMENTS

Rev. 20201015



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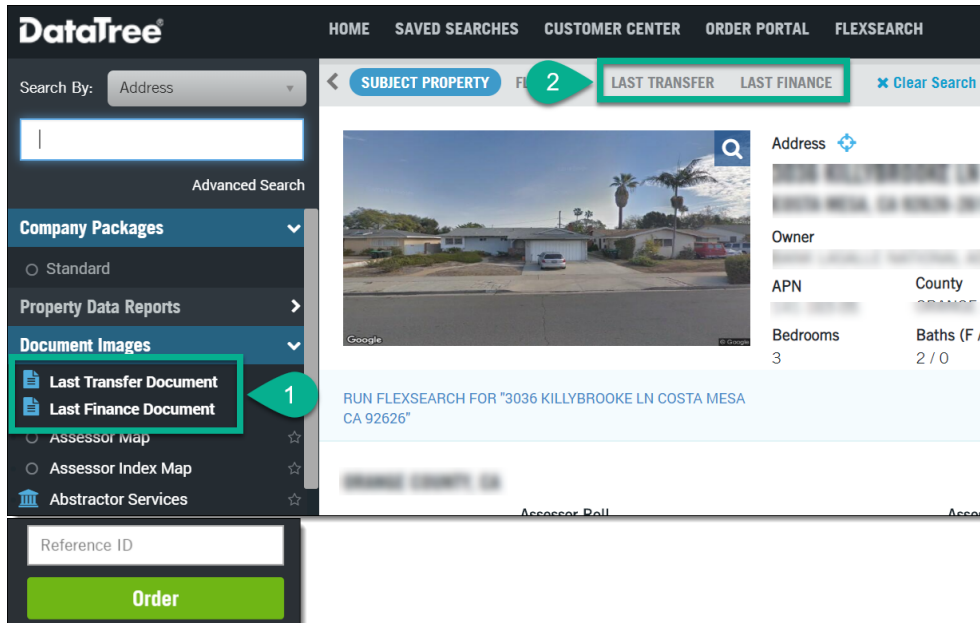
Overview

Document images can be retrieved through several methods in DataTree. Depending upon your needs, you can access the Last Transfer and Finance document, order documents by document number, or order documents through reports.

Last Transfer & Last Finance:

After locating the subject property, if necessary, open the Document Images section of the Available Reports panel. Make your selection and click Order at the bottom of the panel.

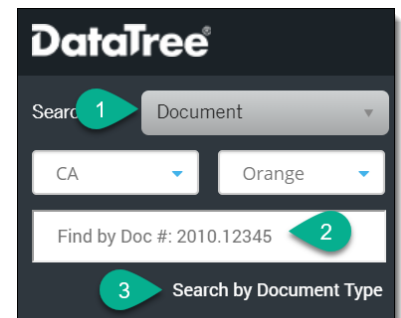
Documents will be opened in a tab to the right of the Subject Property Tab.



Document Search:

If you already have the document number, the document can be retrieved through the Document Search. Select Document from the **Search:** options dropdown, then select the state and county. Enter the document number in the text entry field, then click **Order** at the bottom of the page.

Search by document type is also available by changing the search using the link below the search fields.



Through Reports:

Documents can be ordered through **Property Data Reports**, such as the **Property Detail** and **Transaction History**. In the **Property Detail** report, you can click **Order Document** next to the document. The courthouse icon is for the abstractor service.

Last Market Sale			
Sale / Rec Date:	09/03/1993 / 10/01/1993	Sale Price / Type:	\$ / Full Value
Multi / Split Sale:		Price / Sq. Ft.:	\$1 /
1st Mtg Amt / Type:	\$ / Conventional	1st Mtg Rate / Type:	/ Fixed
2nd Mtg Amt / Type:		2nd Mtg Rate / Type:	
Seller Name:			
Lender:			
Title Company:			
		Deed Type:	
		New Construction:	
		1st Mtg Doc #:	N/A
		Sale Doc #:	

2

1 [Order Document](#)

In the **Transaction History**, select the document by clicking in the checkbox next to the document and click **Order**.

<input type="checkbox"/>	11/21/1991	Deed Transfer	\$207,000		Tiemeyer, Verna J	Higgins, Earl L	+
<input checked="" type="checkbox"/>	11/21/1991	Trust Deed/Mortgage	\$152,250	Tiemeyer Verna J	World Savings & Loan		+
<input checked="" type="checkbox"/>	07/17/1991	Trust Deed/Mortgage	\$81,286	Higgins Earl L	Security Pacific Fin'l Svc		+

Abstractor Services:

Abstractor Services allow you to request that an individual be sent out to perform a manual search of county records should the document be unavailable. Click on the Abstractor button and complete the information.

If the document is found, it will be returned to you in the **Order Portal > View All Orders** menu.

Document Images

- [Last Transfer Document](#) ☆
- [Last Finance Document](#) ☆
- [Assessor Map](#) ☆
- [Assessor Index Map](#) ☆
- [Abstractor Services](#) ☆

The screenshot shows the DataTree Order Portal. The top navigation bar includes 'HOME', 'SAVED SEARCHES', 'CUSTOMER', 'ORDER PORTAL', and 'FLEXSEARCH'. The 'ORDER PORTAL' section is active, showing a summary of orders:

NEW ORDER	NEW BATCH ORDER	VIEW ALL ORDERS
PLACE A SINGLE PROPERTY ORDER	PLACE A MULTI-PROPERTY ORDER	VIEW ALL RECENT ORDER ACTIVITY
All: 1	Processing: 0	Action Required: 0
Ready: 0	Completed: 1	Errors: 0

Below the summary is a search bar and a table of orders:

Status	Status Date	Ref # / Batch Name	Order #	Order Date	Product	APN	Address	City	State	Cycle	Details
Completed	01/31/2019	TEST_CW		01/31/2019	Rapid Legal & ...			Santa Ana	CA	36 minute(s)	+

At the bottom, there is a pagination control showing '1 of 1 Pages' and a 'Next' button.

As mentioned above, there are two methods to access the **Abstractor Service**. This is the form that will appear. Fields highlighted in red are mandatory.

ABSTRACTOR SERVICES
✕

A SINGLE SOLUTION FOR ALL YOUR DOCUMENT RETRIEVAL NEEDS.

In addition to offering the most extensive data and image repository in the nation, we provide you with a nationwide network of document abstractors. This cost-effective, comprehensive solution enables you to request the retrieval of any property record across the nation including mortgages, deeds, assignments, transfers, releases, foreclosures and more.

SELECT DOCUMENTS 1

- MORTGAGE
- LATEST MORTGAGE
- MODIFICATION
- ASSIGNMENT
- RELEASE
- NOTICE OF DEFAULT
- NOTICE OF TRUSTEE SALE
- NY CEMA DOCUMENT
- NY CEMA FULL CHAIN
- MORTGAGE & ALL RELATED DOCUMENTS

- GRANT/WARRANTY DEED
- LAST VESTING DEED
- QUIT CLAIM DEED
- UCC
- UCC & DOWNSTREAM FILINGS
- POWER OF ATTORNEY

STREET ADDRESS

REFERENCE

OPTIONS 2

- FULL DOCUMENTS
- CERTIFIED COPY REQUEST

- PERTINENT PAGES ONLY 3

Note: If the mortgage amount and date are not an exact match, we will provide a copy of the applicable document that is within 30 days prior and 180 days after the recording date and within \$5,000 of the mortgage amount.

5

CANCEL

SUBMIT

The form is divided into four sections:

Select Document (1):

SELECT DOCUMENTS

- MORTGAGE
- LATEST MORTGAGE
- MODIFICATION
- ASSIGNMENT
- RELEASE
- NOTICE OF DEFAULT
- NOTICE OF TRUSTEE SALE
- NY CEMA DOCUMENT
- NY CEMA FULL CHAIN
- MORTGAGE & ALL RELATED DOCUMENTS

- GRANT/WARRANTY DEED
- LAST VESTING DEED
- QUIT CLAIM DEED
- UCC
- UCC & DOWNSTREAM FILINGS
- POWER OF ATTORNEY

Document Options (2 and 3):

Pertinent Pages is only available for Mortgages and CEMAs.

OPTIONS

- FULL DOCUMENTS
- CERTIFIED COPY REQUEST

- PERTINENT PAGES ONLY

Address, Owner, and Document Information(4):

This screenshot shows the default form view for document information. It includes the following fields:

- DOCUMENT ID
- COUNTY
- STREET ADDRESS
- CITY
- STATE (dropdown menu)
- ZIP
- REFERENCE

As shown, this is the default view where a document type has yet to be selected. This section will change and include additional form fields once the document type has been chosen.

This screenshot shows the form view for the Assignment document option. It includes the following fields:

- DOCUMENT ID
- COUNTY
- STREET ADDRESS
- CITY
- STATE (dropdown menu)
- ZIP
- REFERENCE
- DOCUMENT DATE (calendar icon)
- DOCUMENT RECORDING DATE (calendar icon)
- ORIGINAL MORTGAGE DATE (calendar icon)
- ORIG. MORTGAGE RECORDING DATE (calendar icon)
- BORROWER NAME (FIRST & LAST OR COMPANY/TRUST)
- ORIGINAL MORTGAGE AMOUNT
- ORIGINAL LENDER NAME
- TRANSFER DATE (calendar icon)
- GRANTOR
- GRANTEE
- LENDER NAME ON DOCUMENT
- ASSIGNOR
- ASSIGNEE

As example, these are the fields for the Assignment document option:

If you have selected the Abstractor Service via a report, as shown here (1), the abstractor service form will have the added benefit of pre-populating the address fields.

New Construction:
 1st Mtg Doc #: N/A
 Sale Doc #:
[Order Document](#)

DOCUMENT ID **COUNTY**

STREET ADDRESS

CITY **STATE** **ZIP**

REFERENCE

Documents will be returned through the **Order Portal > View All Orders** dashboard.

DataTree HOME SAVED SEARCHES CUSTOMER **1** ORDER PORTAL FLEXSEARCH

Search By: Address

ORDER PORTAL

NEW ORDER: PLACE A SINGLE PROPERTY ORDER
 NEW BATCH ORDER: PLACE A MULTI-PROPERTY ORDER
2 VIEW ALL ORDERS: VIEW ALL RECENT ORDER ACTIVITY

All:	Processing:	Action Required:	Ready:	Completed:	Errors:
1	0	0	0	1	0

Search Find By: Address

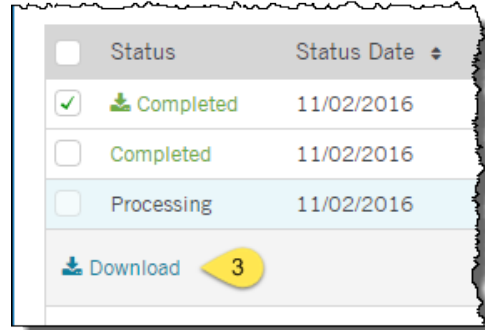
Status	Status Date	Ref # / Batch Name	Order #	Order Date	Product	APN	Address	City	State	Cycle	+ Details
<input type="checkbox"/> Completed	3	019 TEST_CW		01/31/2019	Rapid Legal & ...			Santa Ana	CA	36 minute(s)	+ Details

Per Page: 5 10 25 50 1 of 1 Pages < Prev 1 Next >

When the job is completed, the **Order Portal > View All Orders** dashboard will update with a completed status (3), as shown here.

Click the checkbox next to the completed job and a download link (3) will appear.

Click Download to save the zip file containing your document image.

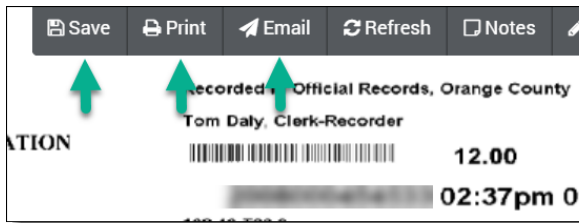


<input type="checkbox"/>	Status	Status Date
<input checked="" type="checkbox"/>	Completed	11/02/2016
<input type="checkbox"/>	Completed	11/02/2016
<input type="checkbox"/>	Processing	11/02/2016

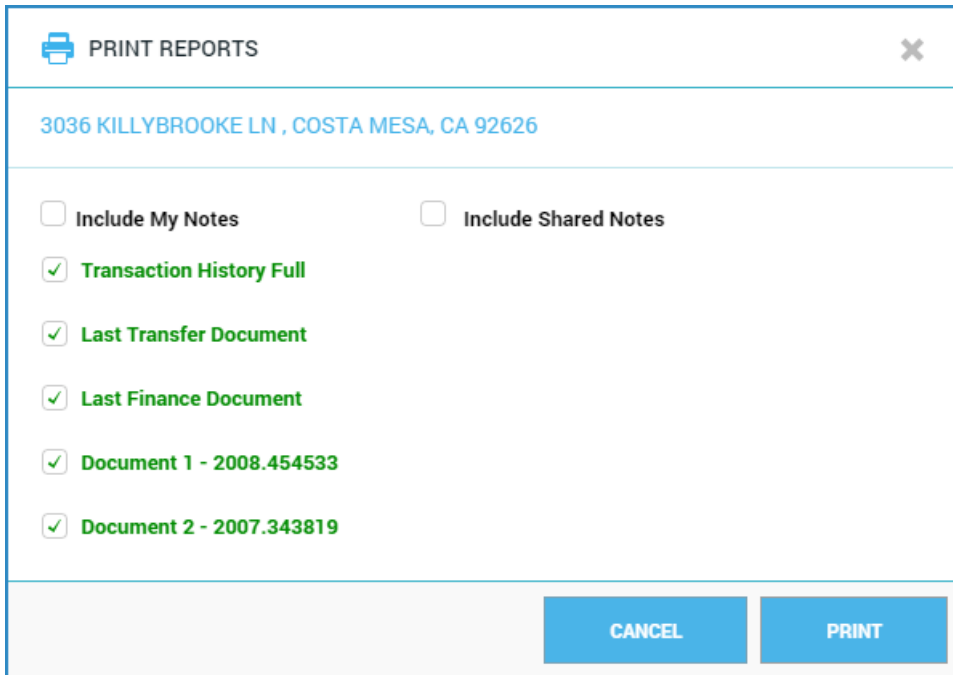
Download 3

Print/Save/Email:

All documents can be saved, printed or emailed.



If you have selected multiple documents (and reports), you can select which ones to print, save or email. Simply deselect the documents (or reports) you do not wish to save, print or email.



PRINT REPORTS

3036 KILLYBROOKE LN , COSTA MESA, CA 92626

Include My Notes Include Shared Notes

Transaction History Full

Last Transfer Document

Last Finance Document

Document 1 - 2008.454533

Document 2 - 2007.343819

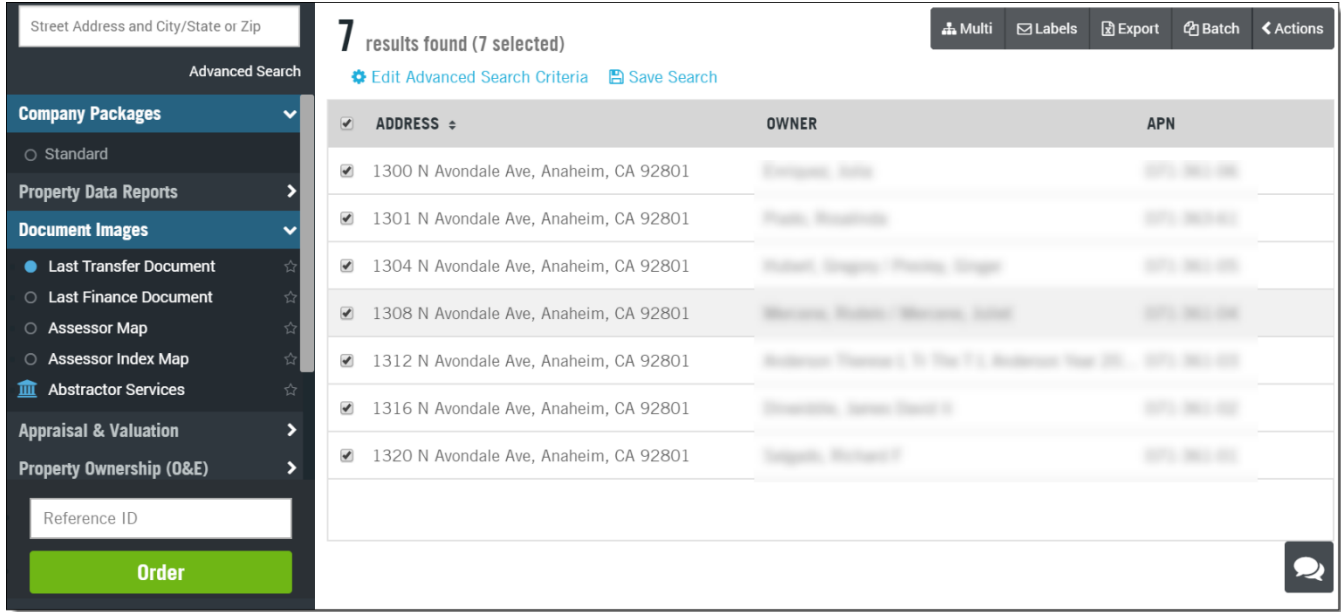
CANCEL PRINT

This functionality is the same for all three services.

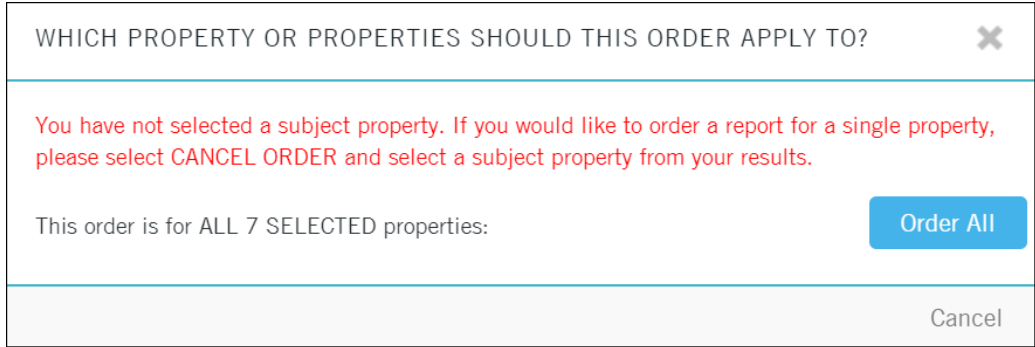
Workflow Tips:

There might be times when you need to order documents for multiple properties at a time. DataTree supports this ability for up to 20 properties at a time.

For example, after you've generated your list of properties, open the Document Images section on the report panel, select Last Transfer Document, and click Order.



You will be presented with a dialog box indicating that you can order the document (or report) for all selected properties. Click Order.



Now you can use the arrow keys or click on a property to view the Last Transfer Document on each property.

