

DataTree[®] ACADEMY

ABSTRACTOR SERVICES

Rev. 20201015

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DATA & ANALYTICS

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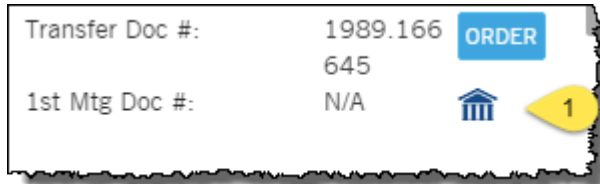
Overview

This document covers the Abstractor Service for DataTree. Should a document image be unavailable, this service allows a user to request that personnel be sent directly to the County offices to retrieve that specific document. For a full review on the available options to retrieve documents in DataTree, see the Document Retrieval Guide.

Accessing the Abstractor Service


If a document image is unavailable, the Abstractor Service icon will appear in the report next to the document. Alternately, you can access the service directly through the Document Images section of the Available Reports menu. Click on the Icon shown in the screenshots below to access the service. Additionally, the service can be used in a cascade for large batches of addresses.

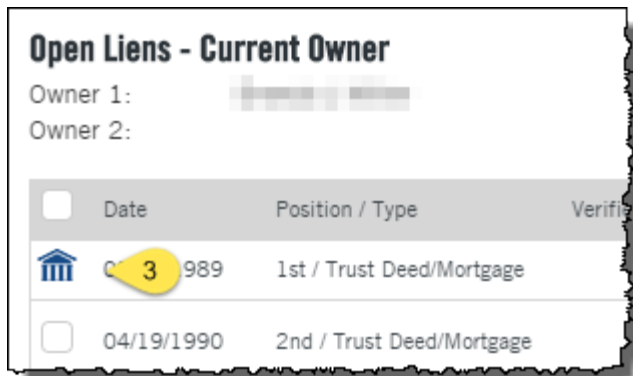
Examples of where the Service is found in the various reports:



1. Property Detail Report

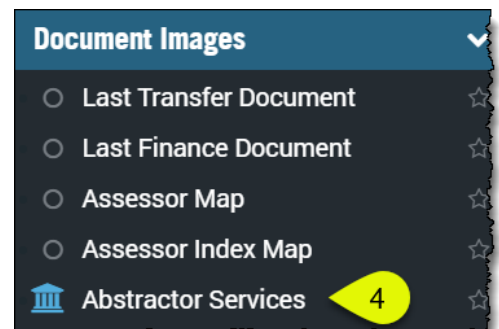
2. Transaction History Report

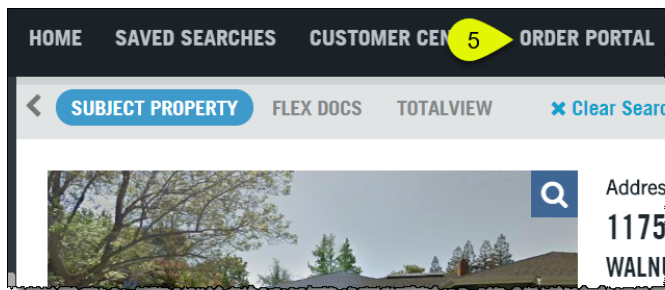
LIENS					
<input type="checkbox"/>	Date	Type	Verified	Amount	Borrower(s)
	1988	Trust Deed/Mortgage		\$159,000	Kirk Craig
<input type="button" value="ORDER"/>					



3. TotalView Report

4. Document Images section:



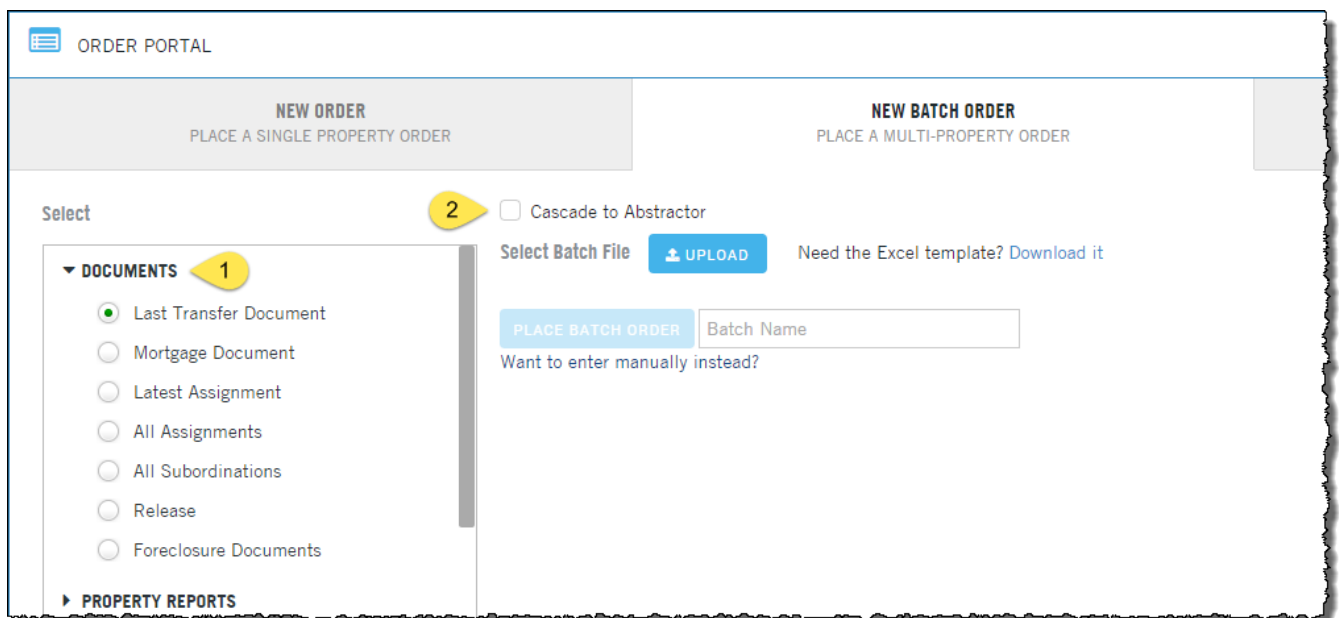


5. From the Order Portal > New Batch Order:

This will open the New Batch Order tab in the Order Portal window.

Click the Documents (1) option to expand the list of available document types.


Once you've selected the document type for the batch search, you can select the option to Cascade to Abstractor (2) if DataTree cannot find the document in the database.



Using the Abstractor service is described below.

Using the Order Form

If you've accessed the service through a report (options 1-3 above,) the service will auto populate the address of the property.

 ABTRACTOR SERVICES ✕

A Single Solution For All of 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, assignments, releases, transfers, deeds, foreclosures and more.

Select Documents

<input type="radio"/> Mortgage	<input type="radio"/> Grant/Warranty Deed
<input type="radio"/> Latest Mortgage	<input type="radio"/> Last Vesting Deed
<input type="radio"/> Modification	<input type="radio"/> Quit Claim Deed
<input type="radio"/> Specific Assignment	<input type="radio"/> UCC
<input type="radio"/> Release	<input type="radio"/> UCC & Downstream Filings
<input type="radio"/> Notice Of Default	<input type="radio"/> Power Of Attorney
<input type="radio"/> Notice Of Trustee Sale	<input type="radio"/> Other Document
<input type="radio"/> NY CEMA Document	
<input type="radio"/> NY CEMA Full Chain	
<input type="radio"/> Mortgage & All Assignments	
<input type="radio"/> Reverse Mortgage	

Options

<input checked="" type="radio"/> Full Documents	<input type="radio"/> Pertinent Pages Only
<input type="checkbox"/> Certified Copy Request	

Instrument Recording ID

County

Street Address

City **State** **ZIP**

Reference


Note To Abstractor

0 / 500

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.

Cancel Submit

Using the service can be summarized in four steps:

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Select Documents

<input checked="" type="radio"/> Mortgage	<input type="radio"/> Grant/Warranty Deed
<input type="radio"/> Latest Mortgage	<input type="radio"/> Last Vesting Deed
<input type="radio"/> Modification	<input type="radio"/> Deed
<input type="radio"/> Specific Assignment	<input type="radio"/> Downstream Filings
<input type="radio"/> Release	<input type="radio"/> Attorney
<input type="radio"/> Notice Of Default	<input type="radio"/> Other Document
<input type="radio"/> Notice Of Trustee Sale	
<input type="radio"/> NY CEMA Document	
<input type="radio"/> NY CEMA Full Chain	
<input type="radio"/> Mortgage & All Assignments	
<input type="radio"/> Reverse Mortgage	

Options

<input checked="" type="radio"/> Full Documents	<input type="radio"/> Pertinent Pages Only
<input type="checkbox"/> Certified Copy	

Instrument Recording ID **County**

Street Address

City

Reference

Mortgage Date **Mortgage Recording Date**

Borrower Name (First Or Company) **Borrower Name (Last)**

Mortgage Amount **Lender Name**

Transfer Date **Grantor** **Grantee**

Lender Name On Document

Note To Abstractor

0 / 500

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.

1. Select the document type


2. Complete the information. Red fields are

3. Include any options, as required.

4. And click Submit

Dynamic Order Form

The order form will also dynamically change based upon the document type selected.

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Select Documents

- Mortgage
- Latest Mortgage
- Modification
- Specific Assignment
- Release
- Notice Of Default
- Notice Of Trustee Sale
- NY CEMA Document
- NY CEMA Full Chain
- Mortgage & All Assignments
- Reverse Mortgage

Options

- Full Documents
- Certified Copy Request

Grant/Warranty Deed

Mortgage Document
Type Selected

Power Of Attorney

Other Document

Pertinent Pages Only

Instrument Recording ID

County

Street Address

City **State** **ZIP**

Reference

Mortgage Date

Mortgage Recording Date

Borrower Name (First Or Company)

Borrower Name (Last)

Mortgage Amount

Lender Name

Transfer Date **Grantor** **Grantee**

Lender Name On Document

Note To Abstractor

0 / 500

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.

Cancel Submit

A Single Solution For All of 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, assignments, releases, transfers, deeds...

Assignment Document Type

Select Documents

- Mortgage
Latest Mortgage
Modification
Specific Assignment
Release
Notice Of Default
Notice Of Trustee Sale
NY CEMA Document
NY CEMA Full Chain
Mortgage & All Assignments
Reverse Mortgage
Grant Warranty Deed
Last Vesting Deed
Quit Claim Deed
UCC
UCC & Downstream Filings
Power Of Attorney
Other Document

Options

- Full Documents
Pertinent Pages Only
Certified Copy Request

Instrument Recording ID
County

Street Address
1300 CORTE DE LOS VECINOS

City: WALNUT CREEK
State: CA
ZIP: 94598

Reference

Document Date
Document Recording Date

Original Mortgage Date
Orig. Mortgage Recording Date

Borrower Name (First Or Company)
Borrower Name (Last)

Original Mortgage Amount
Original Lender Name

Transfer Date
Grantor
Grantee

Lender Name On Document

Assignor
Assignee

Note To Abstractor

0 / 500

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.

Cancel Submit

Document Type

The service provides the most commonly requested document types. Remember: The order form will adjust based upon the document type selected so that you can provide the best information possible to ensure your requested search is successful.

Select Documents

<input type="radio"/> Mortgage	<input type="radio"/> Grant/Warranty Deed
<input type="radio"/> Latest Mortgage	<input type="radio"/> Last Vesting Deed
<input type="radio"/> Modification	<input type="radio"/> Quit Claim Deed
<input checked="" type="radio"/> Specific Assignment	<input type="radio"/> UCC
<input type="radio"/> Release	<input type="radio"/> UCC & Downstream Filings
<input type="radio"/> Notice Of Default	<input type="radio"/> Power Of Attorney
<input type="radio"/> Notice Of Trustee Sale	<input type="radio"/> Other Document
<input type="radio"/> NY CEMA Document	
<input type="radio"/> NY CEMA Full Chain	
<input type="radio"/> Mortgage & All Assignments	
<input type="radio"/> Reverse Mortgage	

Options

Users can request a certified copy of the document to be shipped to them at the address provided in the order form. Rush delivery is an added option and will shorten the mail delivery process by approximately two days. Pertinent Pages option removes “boilerplate” pages from mortgage and CEMA orders.

OPTIONS

<input checked="" type="checkbox"/> FULL DOCUMENTS	<input type="checkbox"/> PERTINENT PAGES ONLY
<input checked="" type="checkbox"/> CERTIFIED COPY REQUEST	<input checked="" type="checkbox"/> RUSH DELIVERY

SHIP TO NAME

ATTENTION

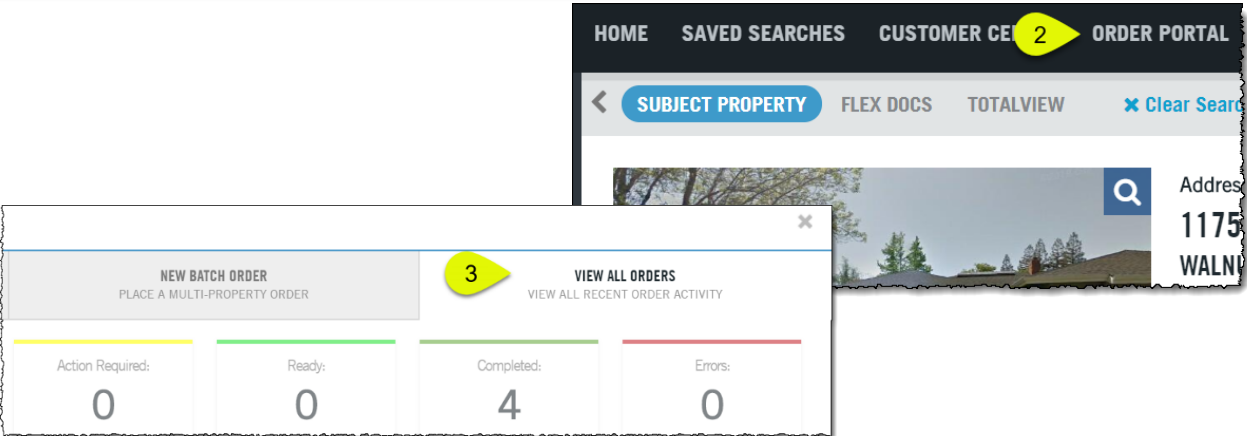
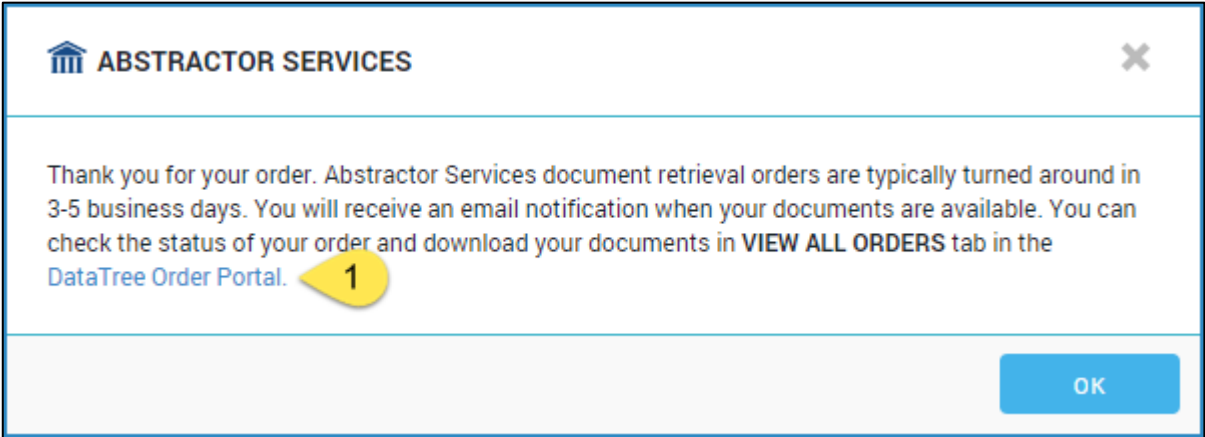
STREET ADDRESS

CITY STATE ZIP

<input type="text"/>	<input type="text"/>	<input type="text"/>
----------------------	----------------------	----------------------

Submitting Your Order and Checking Status:

Upon submission of an Abstractor Services order, users are presented with this message confirming their submission and advising of next steps. All orders are now in the DataTree Order Portal.



Click the link in the dialog box to open the Order Portal or go to the Order Portal option in the search bar can click View All Orders.

Users can check the status of their order and download retrieved documents in Recent Activity dialog box

ORDER PORTAL

NEW ORDER
PLACE A SINGLE PROPERTY ORDER

NEW BATCH ORDER
PLACE A MULTI-PROPERTY ORDER

VIEW ALL ORDERS
VIEW ALL RECENT ORDER ACTIVITY

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

Search Find By: Address Enter Address SEARCH Advanced Search Export

Status	Status Date	Ref # / Batch Name	Order #	Order Date	Product	APN	Address	City	State	Cycle	+ Details
Processing	11/02/2016		910164	11/02/2016	Mortgage		1300 Corte De Los Vecinos	Walnut Creek	CA	0.25 h	

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

Note that the View All Orders dashboard will report on all requests for abstractor orders that are being processed or have been processed. Documents returned via the Abstractor service will be retained for 12 months before being purged.

Clicking the Details link at the far-right hand side of the record list in the Dashboard will open the processing details for that order.

Status	Status Date	Ref # / Batch Name	Order #	Order Date	Product	APN	Address	City
Processing	11/02/2016		910164	11/02/2016	Mortgage		1300 Corte De Los Vecinos	Walnut Creek

11/02/2016 08:27 AM Processing Successfully placed order with vendor. Transaction Number : 396891086

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

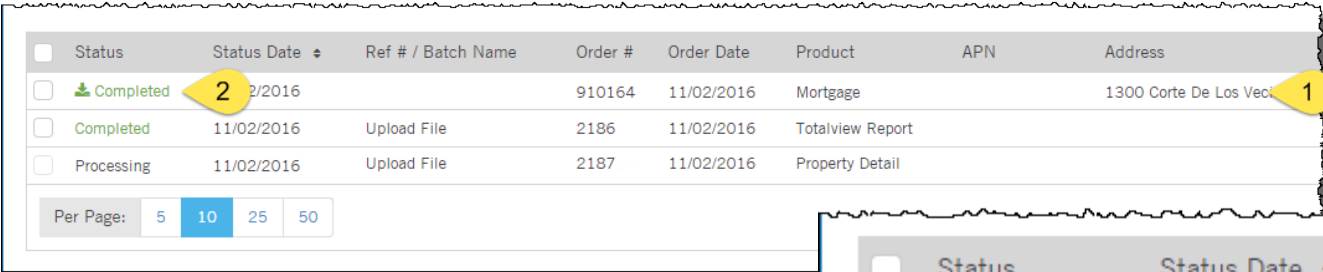
Cycle **1** + Details

0.25 h +

« Prev 1 Next »

1 of 1 Pages Prev 1 Next

When the job (1) has been completed and the document retrieved, the dashboard will update with a “Completed” (2) status.

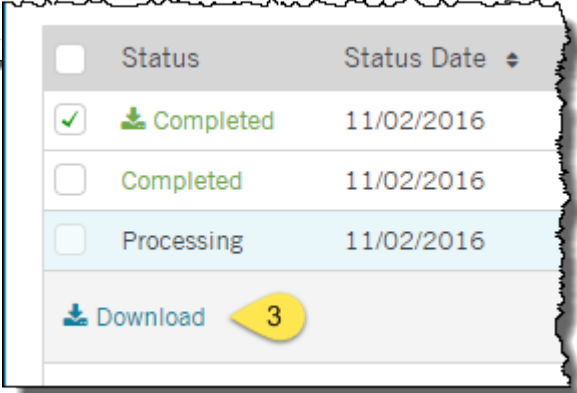


<input type="checkbox"/>	Status	Status Date	Ref # / Batch Name	Order #	Order Date	Product	APN	Address
<input type="checkbox"/>	Completed	11/02/2016		910164	11/02/2016	Mortgage		1300 Corte De Los Vecinos
<input type="checkbox"/>	Completed	11/02/2016	Upload File	2186	11/02/2016	Totalview Report		
<input type="checkbox"/>	Processing	11/02/2016	Upload File	2187	11/02/2016	Property Detail		

Per Page: 5 10 25 50

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.



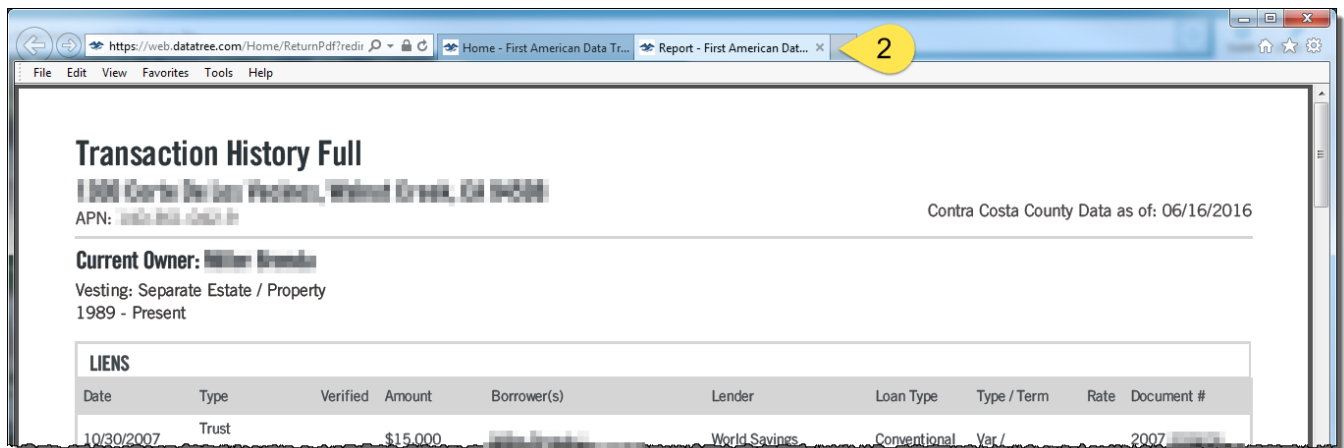
<input type="checkbox"/>	Status	Status Date
<input checked="" type="checkbox"/>	Completed	11/02/2016
<input type="checkbox"/>	Completed	11/02/2016
<input type="checkbox"/>	Processing	11/02/2016

Download

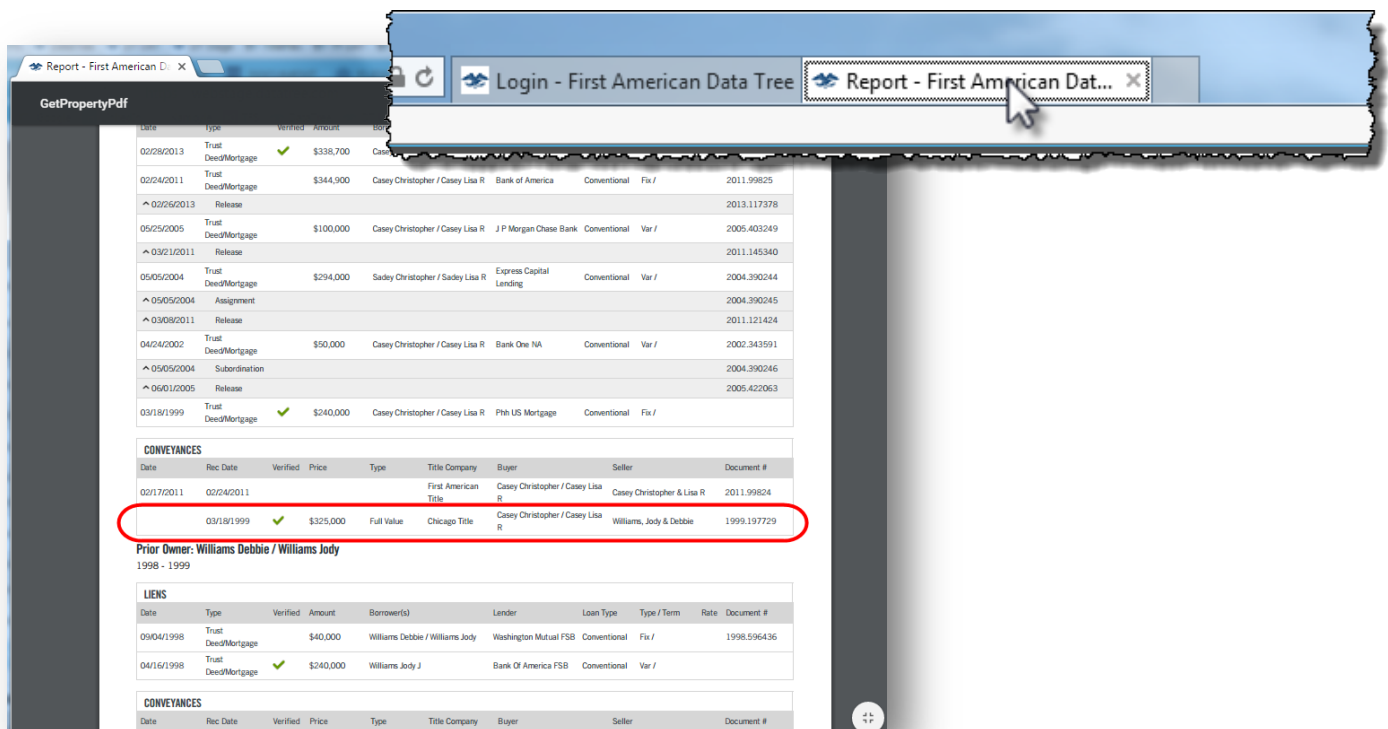
Workflow Tip

Sometimes a Transaction History Report or other report will contain information valuable to an abstractor search. Printing the report will launch a new browser tab that can be set next to an open Abstractor Services order form for easy entry.

1. Print the report. In DataTree this will open the report in Print Review mode in a separate browser tab.



2. Move the Print Preview browser tab by clicking and dragging it out of the existing browser window. This will allow you to put the report side by side with the Abstractor Service form.



3. Complete the information in the Abstractor form and close the print preview when you're finished.

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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

OPTIONS

FULL DOCUMENTS
 CERTIFIED COPY REQUEST

PERTINENT PAGES ONLY
 RUSH DELIVERY

SHIP TO NAME

ATTENTION

STREET ADDRESS

CITY **STATE** **ZIP**

DOCUMENT ID

COUNTY

STREET ADDRESS

CITY **STATE** **ZIP**

REFERENCE

DOCUMENT DATE

DOCUMENT RECORDING DATE

BORROWER NAME (FIRST & LAST OR COMPANY/TRUST)

ORIGINAL MORTGAGE AMOUNT **ORIGINAL LENDER NAME**

TRANSFER DATE

GRANTOR **GRANTEE**

Note: If the mortgage amount and date are not an exact match, we will provide days prior and 180 days after the recording date and within \$5,000 of the

Report - First American D... X

GetPropertyPdf 1 / 3

Date	Type	Verified	Amount	Borrower(s)	Lender	Loan Type	Type / Term	Rate	Document #
02/28/2013	Trust Deed/Mortgage	✓	\$338,700	Casey Christopher / Casey Lisa R	Bank of America	Conventional	/ 30		2013.125044
02/24/2011	Trust Deed/Mortgage		\$344,900	Casey Christopher / Casey Lisa R	Bank of America	Conventional	Fix /		2011.99825
02/26/2013	Release			Casey Christopher / Casey Lisa R	J P Morgan Chase Bank	Conventional	Var /		2013.117378
05/25/2005	Trust Deed/Mortgage		\$100,000	Casey Christopher / Casey Lisa R	J P Morgan Chase Bank	Conventional	Var /		2005.403249
03/21/2011	Release			Casey Christopher / Casey Lisa R	J P Morgan Chase Bank	Conventional	Var /		2011.145340
05/05/2004	Trust Deed/Mortgage		\$294,000	Sadey Christopher / Sadey Lisa R	Express Capital Lending	Conventional	Var /		2004.390244
05/05/2004	Assignment			Sadey Christopher / Sadey Lisa R	Express Capital Lending	Conventional	Var /		2004.390245
03/08/2011	Release			Casey Christopher / Casey Lisa R	Bank One NA	Conventional	Var /		2011.121424
04/24/2002	Trust Deed/Mortgage		\$50,000	Casey Christopher / Casey Lisa R	Bank One NA	Conventional	Var /		2002.343591
05/05/2004	Subordination			Casey Christopher / Casey Lisa R	Bank One NA	Conventional	Var /		2004.390246
06/01/2005	Release			Casey Christopher / Casey Lisa R	Bank One NA	Conventional	Var /		2005.422063
03/18/1999	Trust Deed/Mortgage	✓	\$240,000	Casey Christopher / Casey Lisa R	Phh US Mortgage	Conventional	Fix /		1999.197729

Date	Rec Date	Verified	Price	Type	Title Company	Buyer	Seller	Document #
02/17/2011	02/04/2011				First American Title	Casey Christopher / Casey Lisa R	Casey Christopher & Lisa R	2011.99824
03/18/1999		✓	\$325,000	Full Value	Chicago Title	Casey Christopher / Casey Lisa R	Williams, Jody & Debbie	1999.197729

Prior Owner: Williams Debbie / Williams Jody
1998 - 1999

Date	Type	Verified	Amount	Borrower(s)	Lender	Loan Type	Type / Term	Rate	Document #
09/04/1998	Trust Deed/Mortgage		\$40,000	Williams Debbie / Williams Jody	Washington Mutual FSB	Conventional	Fix /		1998.596436
04/16/1998	Trust Deed/Mortgage	✓	\$240,000	Williams Jody J	Bank Of America FSB	Conventional	Var /		



Getting Help:

For immediate support, please contact the Client Service team using the Live Chat tool in DataTree or call at telephone number 800-708-8463.