

DataTree[®] ACADEMY

REVISIONS TO THE TRANSACTION HISTORY REPORT

Rev. 20201015



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Overview:

This document will provide a comparative look at the original Transaction History Full report and the newly revised Transaction History Report.

In Summary: The new Transaction History Report organizes the documents by owner whereas the original version simply chained the documents in chronological order.

The original Transaction History Full report provided three distinct sections: A header section containing coverage dates, a Summary table, and the Event listing with additional document information.

TRANSACTION HISTORY FULL

SUBJECT PROPERTY

OWNER NAME	IMHOFF AMY & BRIAN	VESTING	HUSBAND AND WIFE JOINT TENANT
MAILING ADDRESS	1308 CORTE DE LOS VECINOS, WALNUT CREEK, CA 94598	APN#	140-361-038-7

DATES	SALES	MORTGAGES	ASSIGNMENTS	RELEASES	FORECLOSURES
START DATE	01/04/1988	01/04/1988	01/01/2005	01/01/2005	01/01/2005
THROUGH DATE					

SUMMARY OF TRANSACTIONS

P PURCHASE R RELEASE A ASSIGNMENT

<input type="checkbox"/>	DATE	DOC TYPE	DOC #	ORIG DOC#	BUYER/BORROWER	SELLER	LENDER
<input checked="" type="checkbox"/>	04/01/2016	DEED TRANSFER	2016.58320		IMHOFF AMY & I...	SHIROMA LIVING...	
<input type="checkbox"/>	04/01/2016	TRUST DEED/MOR...	2016.58321		IMHOFF AMY		UNITED WHOLESA...

FULL TRANSACTION HISTORY

EVENT #1 : SALE | TRANSFER

SALE DATE	03/14/2016	RECORDING DATE	04/01/2016	SALE PRICE	\$665,000
TITLE COMPANY	OLD REPUBLIC TITLE	SALE TYPE		FULL VALUE	
BUYER	IMHOFF AMY & BRIAN				
SELLER	Shiroma Living Trust				

DEED TRANSFER
2016.58320
[ORDER](#)

FINANCE

FINANCE TYPE	RESALE	RECORDING DATE	04/01/2016	LOAN AMOUNT	\$498,750
BORROWER1	IMHOFF AMY				
BORROWER2	IMHOFF BRIAN				
LENDER	UNITED WHOLESALE MTG				
MORTGAGE LOAN TYPE	CONVENTIONAL	MORTGAGE RATE		MORTGAGE RATE TYPE	
		MORTGAGE TERM	30 YEARS		

TRUST DEED/MORTGAGE
2016.58321
[ORDER](#)

EVENT #2 : RELEASE

RECORDING DATE	06/02/2009	ORIG. RECORDING DATE	06/17/2008
RELEASE	2009.127188	TRUST DEED/MORTGAGE	2008.134851

[ORDER](#) [ORDER](#)

The key in the Summary section provides the user with notations of arms-length transfers, releases and assignments.

The new version removes the header information and groups the transaction first by the owner followed by the document type grouping under each owner providing for a more streamlined view of the information.

Transaction History Full
1308 Corte De Los Vecinos, Walnut Creek, CA 94598
 APN: 140-361-038-7 Contra Costa County Data as of: 04/13/2016

Current Owner: Imhoff Amy / Imhoff Brian 1

Vesting: Joint Tenant/Husband & Wife

LIENS 1

Date	Type	Verified	Amount	Borrower(s)	Lender	Loan Type	Type / Term	Rate	Document #
04/01/2016	Resale		\$498,750	Imhoff Amy / Imhoff Brian	United Wholesale Mtg	Conventional	/ 30		2016.58321

CONVEYANCES 2

Date	Rec Date	Verified	Price	Type	Title Company	Buyer	Seller	Document #
03/14/2016	04/01/2016		\$665,000	Full Value	Old Republic Title	Imhoff Amy / Imhoff Brian	Shiroma Living Trust	2016.58320

Prior Owner: Shiroma K / Shiroma Michael M 2

LIENS 1

Date	Type	Verified	Amount	Borrower(s)	Lender	Loan Type	Type / Term	Rate	Document #
06/17/2008	Refinance		\$200,000	Shiroma Katherine T / Shiroma Michael M	American Airlines FCU	Conventional	Fix /		2008.134851
06/02/2009	Release								2009.127188

CONVEYANCES 2

Date	Rec Date	Verified	Price	Type	Title Company	Buyer	Seller	Document #
	05/29/1984					Shiroma K / Shiroma Michael M	Owner Name Unavailable	11810.408

Note that the conveyance sections are placed above each prior owner so the arms-length transfers are clear. This feature replaces the “P” Purchase flag from the original report.

Documents are still ordered in the same fashion.

Each section has headers unique to the document type.

<input type="checkbox"/>	1 Date	2 Rec Date	3 Verified	4 Price	5 Type	6 Title Company	7 Buyer	8 Seller	9 Document #
<input type="checkbox"/>	03/14/2016	04/01/2016		\$665,000	Full Value	Old Republic Title	Imhoff Amy / Imhoff Brian	Shiroma Living Trust	2016.58320

ORDER


1. Document date
2. Date document was recorded
3. Verified will be checked if this transaction shows up in more than two different data sources
4. Price is the sales price from the document
5. Type of transaction (Full Value, etc)
6. Name of the title company handling the transaction
- 7 and 8. Buyer and seller names, respectively.
9. Document number.

<input type="checkbox"/>	1 Date	2 Type	3 Verified	4 Amount	5 Borrower(s)	6 Lender	7 Loan Type	8 Type / Term	9 Rate	10 Document #
<input type="checkbox"/>	04/01/2016	Resale		\$498,750	Imhoff Amy / Imhoff Brian	United Wholesale Mtg	Conventional	/ 30		2016.58321

ORDER

1. Document date
2. Type of loan
3. Verified will be checked if this transaction shows up in more than two different data sources
4. Loan amount
5. Borrower name(s)
- 6 through 9: Lender name and loan details.
10. Document number.

Documents modifying other documents will be found indented immediately underneath the “parent” document, as shown here.

LIENS										
<input type="checkbox"/>	Date	Type	Verified	Amount	Borrower(s)	Lender	Loan Type	Type / Term	Rate	Document #
<input type="checkbox"/>	07/16/2003	Refinance		\$558,800	Roger John C / Roger Lisa M	Bank Of America	Conventional	Fix /		2003.836143
<input type="checkbox"/>	^ 10/22/2003	Release	1							2003.1302543
<input type="checkbox"/>	10/11/2002	Refinance		\$563,000	Roger John C / Roger Lisa M	Bank Of America	Conventional	Fix /		2002.883381
<input type="checkbox"/>	^ 09/10/2003	Release	2							2003.1105810
<input type="checkbox"/>	03/01/2001	Refinance		\$84,000	Roger John C / Roger Lisa M	Sanwa Bank California	Conventional	Var /		2001.116578
<input type="checkbox"/>	^ 10/11/2002	Subordination								2002.883380
<input type="checkbox"/>	^ 07/16/2003	Subordination	3							2003.836142
<input type="checkbox"/>	^ 10/21/2003	Release								2003.1294025
<input type="checkbox"/>	04/07/1999	Refinance		\$66,200	Roger John C / Roger Lisa M	Norwest Bank Colorado	Conventional	Var /		1999.254846
<input type="checkbox"/>	^ 11/15/2002	Release								2002.1033123
	4 31/1998	Subdivision	5	\$516,950	Roger Lisa M / Roger John C	Norwest Mortgage Inc	Conventional	Fix /		

[ORDER](#)

1 through 3: show the modifying documents. The document types are called out (Subordination, Assignments, or Releases) and are automatically shown. This replaces the need to open each section in the original report to see the related documents and removes the necessity of having the key flags to denote the document type.

4. Abstractor service icon. This will launch the abstractor service feature to request this document.

5. The green check mark shows a verified document.