

# DataTree<sup>®</sup> ACADEMY

## WORKFLOW BEST PRACTICES

Rev. 20201015



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**Overview**

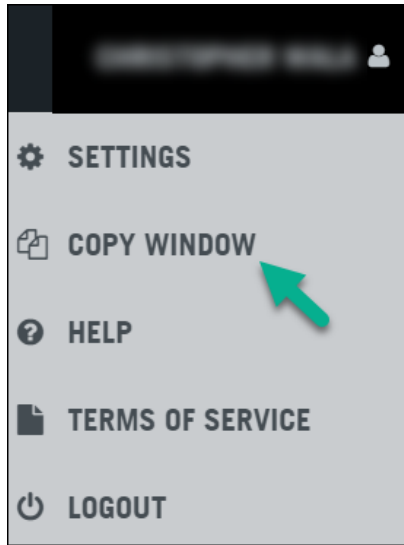
This document will outline some workflow tips and tricks built into DataTree to help maximize your efficiency with the platform.

The information here is relevant to anyone who works in a research or processing position where multiple tasks or cases are being managed at a given time. DataTree is designed to support you in such an environment.

DataTree also provides an option to support instances where property characteristics need to be updated for your business records.

## Running Multiple Searches in DataTree

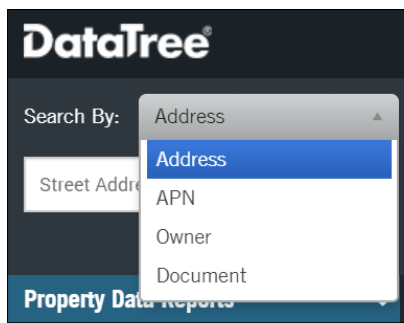
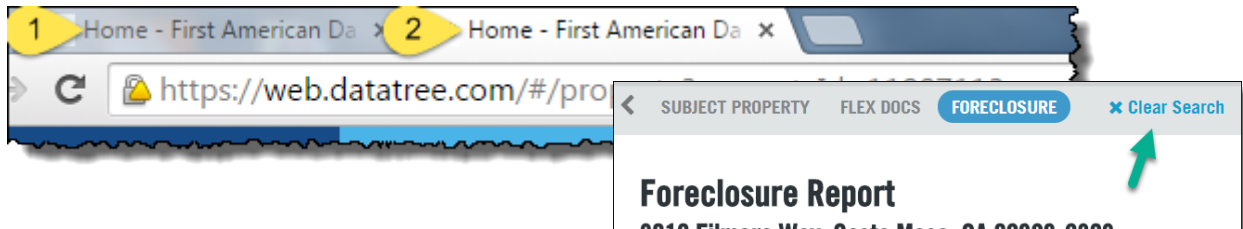
During times when the workload is high and multiple properties and owners are being researched, DataTree allows you to have multiple instances open and run different searches in each browser tab. You might have to search for specific documents at one point while ordering reports for another property and running searches in FlexSearch for UCC statements.



If you find yourself in such a situation, remember that DataTree is setup to allow you to do multiple searches.

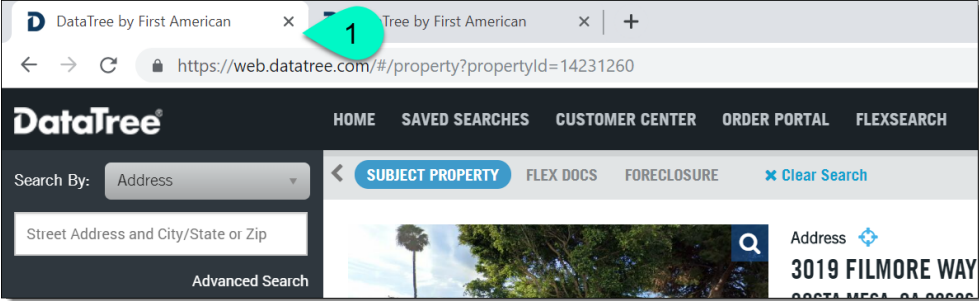
To use this feature, go to the user menu at the top right corner of the DataTree window and click Copy Window.

This will open another tab (2) in your browser and keep you logged in. In the new window (2), click the CLEAR button to start a fresh search.

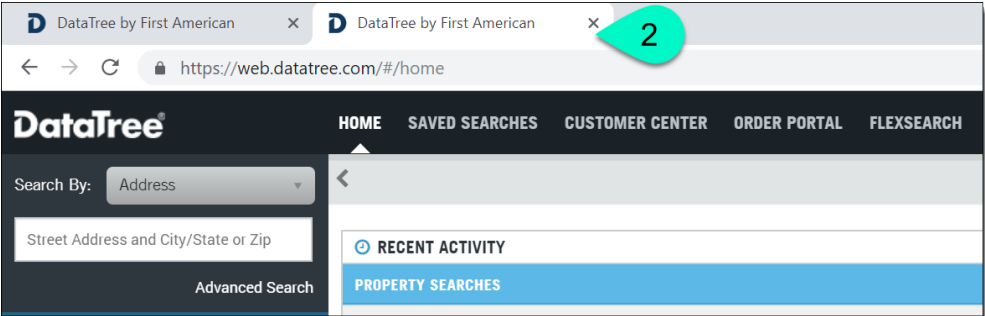


In the Search Bar, select the search option needed and start your next search.

Your original browser tab will retain the search you were working on (1).

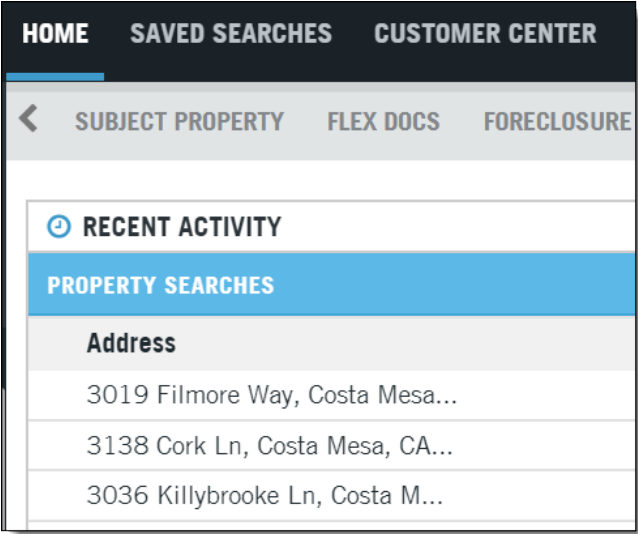


While your new tab will have the next search you are working on (2).



You can have as many tabs open as necessary.

Finally, all your work will be retained in the Recent Activities feature of DataTree.

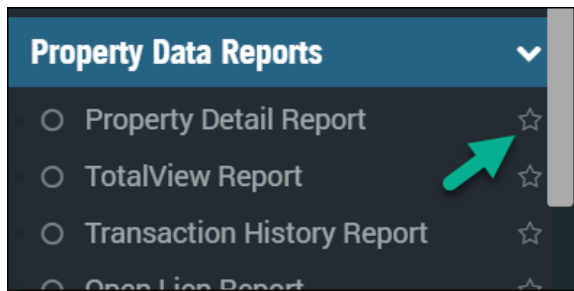
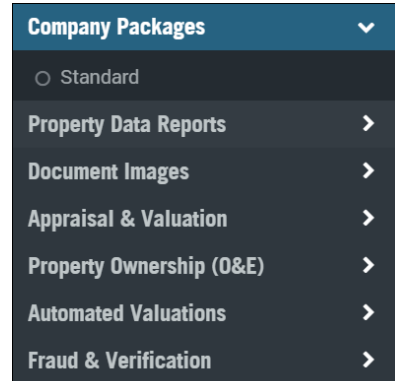


## Keeping Favorite Reports

Within your operations, there may be specific reports that you use repeatedly. While ordering reports is as quick as “click” and “order”, if there are specific reports you use all the time, you can create a favorites list that will keep your reports at the top of the list.

Normally, the Available Reports tab includes the Property Reports, Document Images and Valuation Reports sections. Open a section and order a report.

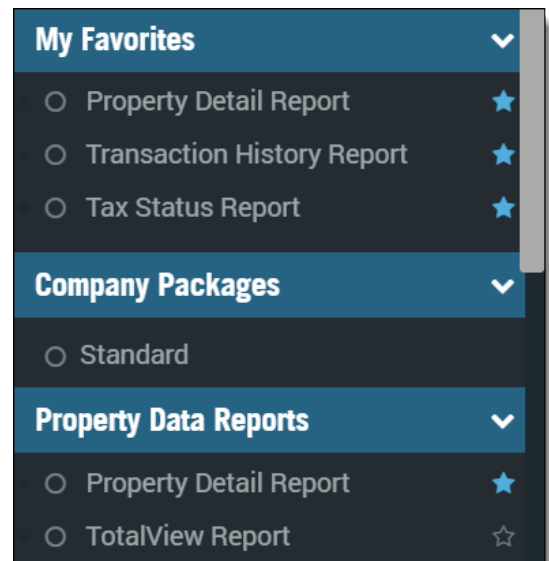
However, you can build a list at the top of the Available Reports where you can keep your favorites without having to open a section to order a report.



To setup a Favorites list, simply click the star to the right of the report.

This will add it to the top of the Panel.

To remove them, simply click the star again.



## One-Time Field Edit: Property Detail Report

There may be times when County Assessor records surrounding a property's characteristics might be slightly different from what is currently on the property. In cases such as this, where your records need to contain current information, DataTree provides the ability to do a non-permanent update to property characteristics which can be printed or saved in the PDF report for your business records.

The Property Detail Report provides the option to update selected information specific to these sections of the report:

**Owner Information**

Owner Name: 1 Fitzgerald [Redacted]

Vesting:

Mailing Address: 2 5202 Rose Canyon [Redacted]

**Property Characteristics** 3

Gross Living Area:	2,452 Sq. Ft.	Total Rooms:	8	Year Built / Eff:	2010
Living Area:	2,452 Sq. Ft.	Bedrooms:	4	Stories:	
Total Adj. Area:		Baths (F / H):	3 /	Parking Type:	Garage
Above Grade:		Pool:		Garage #:	2
Basement Area:		Fireplace:		Garage Area:	450 Sq. Ft.
Style:	H-Shape	Cooling:	Central	Porch Type:	
Foundation:		Heating:	Central	Patio Type:	
Quality:	Average	Exterior Wall:		Roof Type:	Shingle
Condition:	Average	Construction Type:	Wood	Roof Material:	Shingle

To make these updates, click the Edit icon at the top of the report.

**Property Detail Report**  1

**5202 Rose Canyon Ct, Rancho Cordova, CA 95742**

APN: 067-0730-101-0000

NOTE: If you do not see this icon, contact your company's local administrator as this is an administrator-defined permission.

Clicking the Edit Icon will open the following dialog box:

### ONE-TIME FIELD EDIT ✕

5202 ROSE CANYON CT  
RANCHO CORDOVA, CA 95742

THE FOLLOWING FIELDS MAY BE UPDATED TO PRODUCE A REPORT ON THIS PROPERTY. THE INFORMATION ENTERED BELOW WILL APPEAR IN THIS INSTANCE OF THE REPORT ON THIS PROPERTY, BUT WILL NOT EDIT THE SOURCE DATABASE.

OWNER INFORMATION			PROPERTY CHARACTERISTICS			
<b>OWNER NAME</b> <input type="text" value="FITZGERALD"/>			<b>LIVING AREA</b> <input type="text" value="2452"/>	<b>GROSS LIVING AREA</b> <input type="text" value="2452"/>	<b>LOT AREA</b> <input type="text" value="10094"/>	
<b>MAIL ADDRESS</b> <input type="text" value="5202 ROSE CANYON CT"/>			<b>BASEMENT AREA</b> <input type="text"/>	<b>TOTAL ROOMS</b> <input type="text" value="8"/>	<b>BEDROOMS</b> <input type="text" value="4"/>	<b>BATHROOMS</b> FULL HALF <input type="text" value="3"/> <input type="text"/>
<b>CITY</b> <input type="text"/> <b>ST</b> <input type="text"/> <b>ZIP</b> <input type="text"/>			<b>PARKING TYPE</b> <input type="text" value="GARAGE"/>	<b>GARAGE AREA</b> <input type="text" value="450"/>	<b>GARAGE CAPACITY</b> <input type="text" value="2"/>	<b>HEAT TYPE</b> <input type="text" value="CENTRAL"/>
			<b>AIR CONDITIONING</b> <input type="text" value="CENTRAL"/>	<b>FIREPLACE</b> <input type="text"/>	<b>FOUNDATION</b> <input type="text"/>	<b>ROOF MATERIAL</b> <input type="text" value="SHINGLE"/>
			<b># OF STORIES</b> <input type="text"/>	<b>POOL</b> <input type="text"/>	<b>STYLE</b> <input type="text" value="H-SHAPE"/>	
			<b>OTHER IMPROVEMENTS</b> <input type="text"/>			

As you update the information, the selected fields will be highlighted in yellow.

BEDROOMS			BATHROOMS	
			FULL	HALF
<input type="text" value="5"/>			<input type="text" value="4"/>	<input type="text"/>

Click Confirm to apply the changes.

You will receive and confirmation dialog box. Click Confirm to continue with the one-time edit.

**ONE-TIME FIELD EDIT**
✕

Do you want to add the one-time edits made here to the Property Detail Report output?

CANCEL

CONFIRM

Once the edits have been applied, the Property Detail Report will be updated and will contain a footer with the notification that modifications have been applied.

<b>Property Characteristics</b>					
Gross Living Area:	2,452 Sq. Ft.	Total Rooms:	8	Year Built / Eff:	2010
Living Area:	2,452 Sq. Ft.	Bedrooms:	5	Stories:	
Total Adj. Area:		Baths (F / H):	4 /	Parking Type:	Garage
Above Grade:		Pool:		Garage #:	2
Basement Area:		Fireplace:		Garage Area:	450 Sq. Ft.
Style:	H-Shape	Cooling:	Central	Porch Type:	
Foundation:		Heating:	Central	Patio Type:	
Quality:	Average	Exterior Wall:		Roof Type:	Shingle
Condition:	Average	Construction Type:	Wood	Roof Material:	Shingle
<b>Site Information</b>					
Land Use:	SFR	Zoning:	RD 5	# of Buildings:	1
State Use:		Lot Area:	10,094 Sq. Ft.	Water Type:	
County Use:	1 Family Residential	Lot Width / Depth:		Sewer Type:	
Acres:	0.2317	Usable Lot:		Res / Comm Units:	
Site Influence:					
<b>Tax Information</b>					
Assessed Year:	2015	Assessed Value:	\$297,850	Market Total Value:	
Tax Year:	2015	Land Value:	\$95,940	Market Land Value:	
Tax Area:	08004	Improvement Value:	\$201,910	Market Imprv Value:	
Property Tax:	\$5,454.08	Improved %:	67.79%	Market Imprv %:	
Exemption:		Total Taxable Value:	\$297,850	Delinquent Year:	
<b>THE FOLLOWING FIELDS HAVE BEEN MODIFIED BY USER/CUSTOMER ONLY FOR THIS REPORT: BEDROOMS, FULL BATHROOMS</b>					