

DataTree[®] ACADEMY

DATATREE FILTER CATALOG

Rev. 20201015



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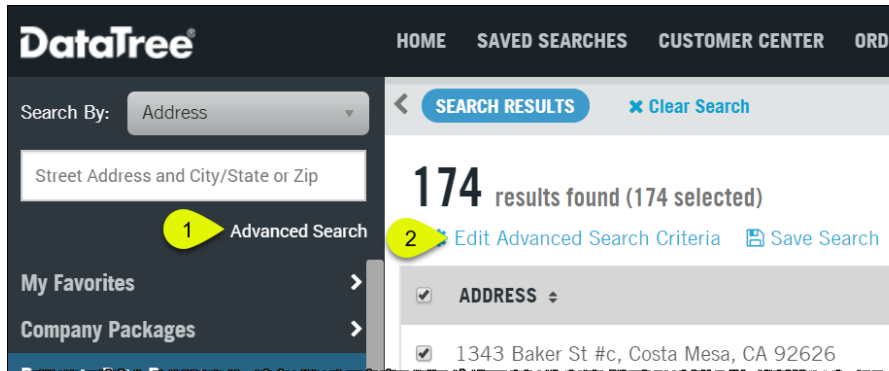
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Overview

DataTree has a comprehensive Filter functionality that allows clients to create custom searches for mailing lists based on their requirements. This guide will provide details on how each filter works for Location, Characteristics, Transaction, Distressed and Owner.

Getting Started

To access the search filter options, use the **Advanced Search** link from the search options, or if you have conducted a search using the map, click the **Edit Advanced Search Criteria** link.



BEFORE YOU BEGIN: Rather than adding all the criteria at once, you may want to click Search after adding each filter, so you are aware of the number of properties that the LOCATION filters return. For example, if you are working in a rural area, there may be only 10 properties matching the initial **LOCATION** filter, in which case you may need to adjust your initial filters before adding additional filters. Establish the universe of data at the start in the **LOCATION** filter and then narrow your selections. Remember, there is no charge for searching.

Location Filters

This provides a default view of all **LOCATION** filters. Plus signs (+) allow for additional parameters to be added to any created filter.

TIP: All other filter tabs, Characteristics, Transaction, Distressed, and Owner, depend upon the Location tab. Start here when building your mailing list (Farm) or sales comparable list.

TIP: DataTree will allow you to do Statewide, Countywide, down to tract or APN ranged searches giving you extremely broad to very narrow **LOCATION** filters.

LOCATION

Address Bundle ?

Street # is between and

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

Street Name is

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

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

Unit # is

[Add to Search](#)

City is +

ZIP Code is +

APN is +

Tax Area is +

Census Tract is +

Subdivision

Appraisal District

Neighborhood Name

HOA Name

School District

Elementary School

Middle School

High School

Carrier Route +

Tract Block Lot Bundle

Tract is

Block is

Lot is

[Add to Search](#)

Township Range Section Bundle

Township is

Range is

Section is

Quarter is

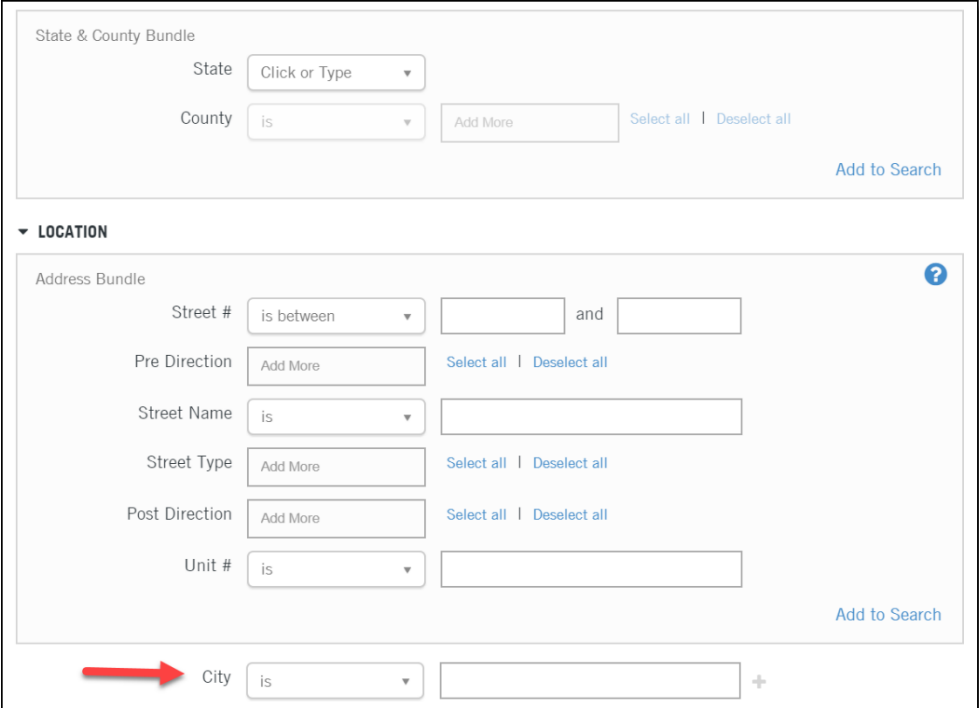
[Add to Search](#)

APN is a parcel filter that accepts numeric values with dashes. Filter allows parcel range searching.



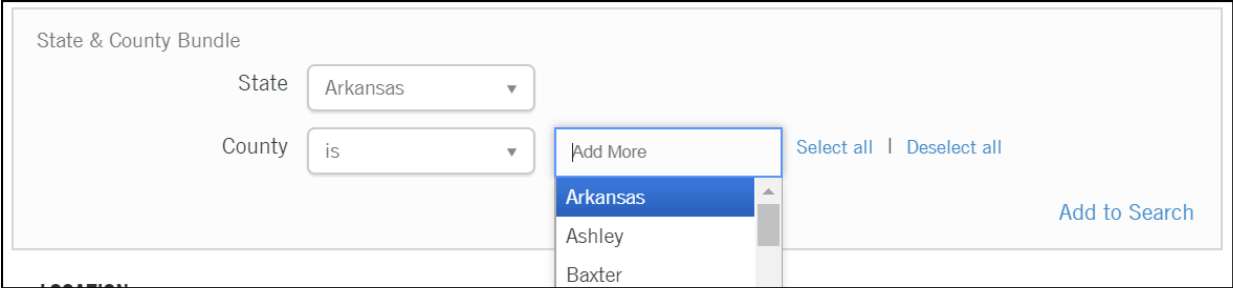
The image shows a search filter for APN. It consists of a dropdown menu with the word "is" selected, followed by an empty text input field, and a plus sign icon to the right.

City allows for city name filtering. Works best when used with State, County and Street Name. For results more than 10,000, Export is the only option available.



The image shows a complex search interface. At the top is the "State & County Bundle" section with "State" set to "Click or Type" and "County" set to "is". Below this is the "LOCATION" section, which is expanded to show an "Address Bundle". The "Address Bundle" includes filters for "Street #", "Pre Direction", "Street Name", "Street Type", "Post Direction", and "Unit #". At the bottom of the "LOCATION" section, a "City" filter is visible, set to "is". A red arrow points to the "City" filter.

County is a drop-down selection of available counties. The State filter must be selected before county can be selected. Use the Plus (+) sign to add more counties.



The image shows the "State & County Bundle" section of the search interface. The "State" dropdown is set to "Arkansas". The "County" dropdown is set to "is", and its menu is open, showing a list of counties: "Arkansas", "Ashley", and "Baxter". There is an "Add More" button above the list and "Select all" and "Deselect all" links to the right. An "Add to Search" button is located at the bottom right of the section.

Neighborhood allows filtering by neighborhood name.

gold

AVAILABLE NEIGHBORHOODS	SELECTED NEIGHBORHOODS
GOLD BEACH	
GOLD COAST	
GOLD CREEK ESTATES	
GOLD CREEK HEIGHTS	
GOLD CREEK VISTA	
Select All	Clear All

Apply

Neighborhood Name

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](#)

Post Dir accepts directional identifiers such as North, South, East, West, etc.

Pre Dir accepts prefixes for North, South, East, West, etc. Example: 100 W. Birch Street

Street Name accepts alpha and numeric values.

Street Number accepts numeric values and allows for range search.

Street Type is a drop-down selection of abbreviated street types such as CREE for Creek.

Subdivision accepts type-in Subdivision names but must have State and County selected first.

water

AVAILABLE SUBDIVISIONS

- ATWATER PARK
- ATWATER THE PH 01
- BALLARD WATER-FRONT ADD
- BAYVIEW WATERFRONT TRS
- BLUE WATER VIEW

Select All

SELECTED SUBDIVISIONS

Clear All

Apply

Subdivision

Click the subdivision text field and type partial or complete names to search for matches. Available subdivision names will appear (auto-wildcard). Selections can be added by using the **Apply** button.

Tax Area accepts numeric values for tax rate areas. Works best when State and County selected.

Tract appears to take numeric values but works best with State and County selected. It will either show a direct property match or an index of properties.

Unit Number accepts numeric condo unit numbers. (Example: Unit 2 for California, Ventura, Street Number 9540 with Street Name “Telegraph”).

Zip Code accepts numeric values of zip codes and accepts range searching.

Unit # is

City is

ZIP Code is

APN is

Tax Area is

Census Tract is

Subdivision

Characteristics Filters

CHARACTERISTICS

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

County Land Use

Zoning Code ▼ and +

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

Year Built ▼ and

Living Area (Sq. Ft.) ▼ and

Bedrooms ▼ and

Bathrooms ▼ and

Total Rooms ▼ and

Lot Area ▼ and

Lot Acreage ▼ and

Stories ▼ and

Pool ▼

Garage Spaces ▼ and

Of Units ▼ and

Land Use is a drop-selection of choices from Agriculture Types to Vacant Land Types. Each Type selection contains subgroups in a cascading menu. Individual selections within the subgroup can be made.

County Land Use is a numeric value input in the assessment of property for tax purposes. Best used with Location filter.

Zone Code takes numeric and alpha values that can also be done as a range search.

TIP: Zone Codes are county specific. Examples can be found on the Property Detail Report in the Site Information Section in the Zoning field.

Site Influence Is a drop selection of choices from Commercial through Other. Each selection has more types in a cascade menu.

***TIP:** Site influence is provided by the counties. 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 takes a numeric value of four characters.

Living Area (SQFT) takes a numeric value input that can be used in a range search. This value is the same found for Living Area within the Property Detail report.

Bathrooms, Bedrooms, Total Rooms all take numeric input values that can also be done as a range search.

Lot Area (SQFT) takes a numeric value that can also be done as a range search.

Lot Acreage takes a numeric value that can also be done as a range search (low to high). Values can be in decimal form.

Stories takes a numeric value that can also be done as a range search. Works best with Location filter.

Pool is a drop-selection between Yes, No and No Preference. It functions to gather properties that have swimming pools.

Garage Spaces takes a numeric value that can also be done as a range search.

of Units takes a numeric value that can also be done as a range search. Works best with Location filter.

Owner:

The **OWNER** filters allow you to narrow your search by out-of-state owners and filter out those on the Do Not Mail list. Additional filters for occupancy, exemptions and ethnicity are also available.

Owner Last Name and Owner First Name

take alpha characters of owner's last and first name, respectively.

Owner (All) takes the alpha characters of the additional owners last name.

Owner Ethnicity is a drop-selection of fourteen ethnic types.

Exemption is a drop-selection of thirteen exemption types,

Owner Occupied is a drop-selection: No Preference, Owner Occupied and Absentee Owner.

Mailing State is a drop-selection of States.

Mailing County is a drop-selection of available counties. This must be used with Mailing State filter.

Mailing Street # is a numeric input value.

Pre Dir accepts prefixes for North, South, East, West, etc.

Mailing Street Name is an alpha and numeric input value.

OWNER

Owner Last Name is +

Owner First Name contains +

Owners (All) contains +

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

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

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

\$ Properties Owned is between and

Corporate Owned Click or Type

Do Not Mail Click or Type

Mailing State & County Bundle

Mailing State is Click or Type

Mailing County is Add More [Select all](#) | [Deselect all](#)

[Add to Search](#)

Mailing Address Bundle

Mailing Street # is between and

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

Mailing Street Name is

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

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

Mailing Unit # is

[Add to Search](#)

Mailing City is +

Mailing ZIP Code is +

International Mailing Bundle

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

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

Canadian Mailing City is

Canadian Mailing Postal Code is

[Add to Search](#)

Street Type accepts alpha and numeric values

Post Dir accepts directional identifiers such as North, South, East, West, etc.

Mailing Unit # accepts numeric condo and apartment unit numbers

Do Not Mail is a drop-selection from No Preference, Include and Exclude.

Transaction Filters

The **TRANSACTION** filters provide options for filtering by Sales, Mortgage Information and Listing Information for properties.

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](#)

Transaction Type is a drop-selection of seven types from Resale to Non-Arms-Length Sale.

Sales Price takes a numeric input value that can also be done as a range search.

Sales Price Type is a drop-selection of various sales price types from Confirmed to Verified.

Last Sale Date and Last Sale Recording Date are drop-selections for the Last 3, 6, 12 and 24 Months. Custom dates can be entered in the fields directly below the drop selection menus.

Recording Month is a drop-selection of any one of twelve months.

Seller Name takes alpha characters based on last name.

Transaction Deed Type is a drop-selection from Deed, Quitclaim, Trust Deed/Mortgage and Foreclosure.

Open Lien Information

▼ OPEN LIEN 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](#)

Mortgage Amount takes a numeric input value that can also be done as a range search.

***TIP:** This is the mortgage origination amount, as specified on the origination document. Current balances are not available in DataTree.*

Mortgage Recording Date is a drop-selection from Last 3, 6, 12 and 24 Months. You can insert custom dates in the fields below the drop selection menu.

Mortgage Type is a drop-selection of seven mortgage types from FHA to VA.

Seller Carryback can filter by **Only** or **No** carrybacks.

Interest Rate takes a numeric input value that can also be done as a range search.

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

Int Rate Type is a drop-selection of five interest types from Fixed to Graduated.

Original Lender Name will allow filtering by (is/is not) and text entry of names with type ahead functionality.

Title Company is an alpha character input for any title company.

Number of Open Liens is a dropdown field of predetermined values, including **Free and Clear**.

Lender Filters

Listing Information

▼ LISTING INFORMATION

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

Listing Date and

Listing Price and

Listing Status is drop-selection of choices from Active, Pending, and Sold utilizing (is/is not) logic.

Listing Date takes specified or predefined date ranges that can be entered or chosen from a pop-up calendar, utilizing (is/is between/is before/is after) logic.

Listing Price takes a numeric input value that can also be done as a range search. Works best when used with Location filters.

Equity

▼ EQUITY

Equity Value and






Equity % and

Equity Value accepts numeric values leveraging (is/is between) logic.

Equity % accepts numeric values leveraging (is/is between) logic.

Finance Scores

▼ FINANCE SCORES ?

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

The Finance Score filters are a premium filter that provide an estimate of the likelihood (or propensity) for a homeowner to secure a new mortgage. These are designed to support portfolio management and marketing campaigns

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

Assessor Values

▼ **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 filters leverage (is/is between) logic and text entry fields accepting numeric values.

Market Value

▼ **MARKET VALUE**

Estimated Value	is between ▼	<input type="text"/>	and	<input type="text"/>
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Estimated Value allows for numeric values utilizing (is/is between) logic.

Foreclosure Information:

These filters allow you to target distressed properties or properties that have been through the foreclosure process.

▼ FORECLOSURE INFORMATION

Foreclosure Bundle

Foreclosure Status

Foreclosure Recorded Date and

Foreclosure Event Date and

Foreclosure Amount and

[Add to Search](#)

Foreclosure Status is a drop-selection of choices from Default, Auction, REO, REO Sale and Short Sale.

- **Default:** The homeowner has failed to pay their mortgage for a certain period of time.
- **Auction:** The servicer or lender (the lien holder) has scheduled the property to be sold at auction to recover the outstanding balance.
- **REO:** The property was not purchased at auction or has otherwise returned to the lien holder. It is now owned by the lienholder.
- **REO Sale:** The property has been sold by the lienholder to a private individual
- **Short Sale:** Describes the sale of a property in the foreclosure process where the sale amount may be insufficient to cover the remaining balance on the loan.

Foreclosure Recorded/Event Date are drop-selection for searching by the specified or predetermined date ranges. Future-facing filters are useful for investors looking to upcoming auctions.

***TIP:** Use the “Next” dates for searching for properties in the Auction stage.*

Foreclosure Amount takes a numeric input value that can also be done as a range search. Works best when used with Location filters and Foreclosure Status selection.

Lien Filters

PACE Financing

▼ **PACE FINANCING**

\$ PACE Loan Type [Select all](#) | [Deselect all](#)

\$ PACE Loan Recording Date ▼ and

\$ PACE Loan Amount ▼ and

PACE Loan Type is a drop-down filter allowing for options such as Doors/Windows/Skylights, HVAC, Solar, Ventilation, etc.

PACE Loan Recording Date accepts specific or predefined date ranges and text entry fields where dates can be typed or selected from a calendar pop-up window.

PACE Loan Amount accepts numeric values and leverages (is/is between) logic.

HOA Lien

▼ **HOA LIEN**

\$ Open HOA Lien Present ▼

Open HOA Lien Present is a simple Yes/No filter to check for HOA Liens.