

DataTree[®] ACADEMY

FILTER CATALOG: ADVANCED FEATURES

Rev. 20201015

First American Data Tree LLC and First American Mortgage Solutions, LLC, (the operating entities that may provide products and services as First American Data & Analytics) make no express or implied warranty regarding the information presented and assume no responsibility for errors or omissions. First America, DataTree and the eagle logo are registered trademarks or trademarks of First American Financial Corporation and/or its affiliates.



First American
DATA & ANALYTICS

©2020-2021 First American Financial Corporation and/or its affiliates. All rights reserved. NYSE: FAF

Contents

Overview	3
Getting Started	3
Basic Navigation and General Features:.....	4
Filter Menu Functionality:	6
Drop Selection Menus	7
Search to Pick Lists	8
Working with Bundles:.....	9
State and County Bundle	12
Location Filters	13
Address Bundle	13
Location (Continued)	15
Characteristics Filters.....	18
Owner.....	21
Owner – Mailing State and County Bundle.....	24
Owner – Mailing Address Bundle	25
Owner – Mailing City and Zip Code.....	26
Owner – International Mailing Bundle.....	28
Sale Information:	29
Financing Information.....	32
Finance Scores	36
Assessor Values.....	37
Equity	38
Market Value	39
Listing Information	40
Foreclosure Information	41
HOA Lien.....	42

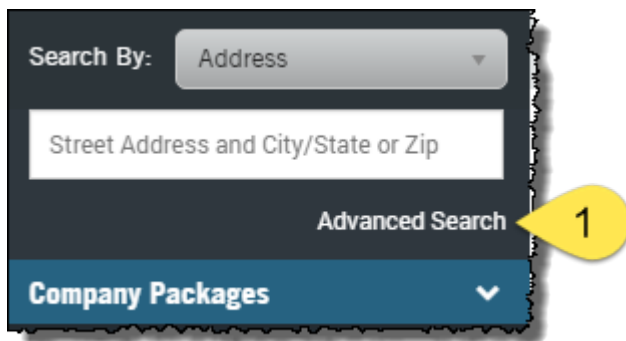
Overview

DataTree has a comprehensive filter functionality that allows clients to create custom searches for mailing lists. This guide will provide details on how each filter works as well as functionality tips within the advanced filters.

Basic navigation, general, and common information is at the beginning of this document. The document lists the individual groups and fields in the same order as in the filter panel.

Getting Started

Access the filters through the Advanced Search link shown here:



Basic Navigation and General Features:

Below is a general key of the features and layout of the Advanced Search panel.

The screenshot shows the 'ADVANCED SEARCH' interface. Callout 1 points to the 'Jump to:' dropdown menu. Callout 2 points to the 'Form:' dropdown and the 'Create Custom Forms' link. Callout 3 points to the 'Clear All' button. Callout 4 points to the '0 results' counter and the 'View Results' and 'Get Count' buttons. Callout 5 points to the filter group categories on the left. Callout 6 points to the 'Add to Search' button. Callout 7 points to the 'STATE & COUNTY BUNDLE' panel. Callout 8 points to the 'ADDRESS BUNDLE' panel. Callout 9 points to the 'Select all | Deselect all' options. Callout 10 points to the 'Listing Price' filter.

1. Jump To: Use to jump to a specific group of filters. You can also use the scrollbar to the right of the filters to scroll through the

whole list.

2. Create Custom Forms and Form Drop Down List: You can create and save custom forms by removing the filters that you do not use and retaining commonly used filters based upon your use cases.

3. Clear All: Removes all entries in a filter.

4. Results counter, View Results and Get Count. Results will display the number of records matching your current filter set. Get Count refreshes the counter. View Results pulls the list of records.

5. Filter Groups: Shown both collapsed and open. Click the triangle next to the Group name to open or close the group.

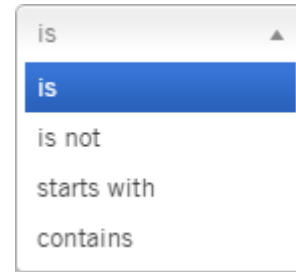
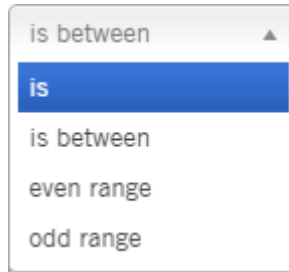
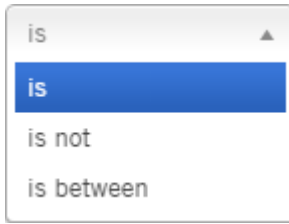
6. Add to Search: Certain areas of the filters function as a bundle (Address Bundle, State & County Bundle, etc). When entering information into these bundles, click Add to Search to add the information to the query.


7. Query Builder Panel: Shows the currently selected filters and current record count. Note this example shows two bundles, the State and County bundle and the Address bundle.

8. Edit (pencil) and Delete (x): Click on either option to edit or delete the bundle.

9. Select All | Deselect All: Certain fields will include the option to select every available entry (such as Counties, Mortgage Types, Listing Status, etc.).

10. **Filter Modifiers:** Many fields have a drop down list of filter options to allow for inclusion or exclusion of specific ranges of data. Shown below are a few of the examples; others will be discussed in the sections below.



A field with denoted  with: is a premium field. Additional charges will apply.

Finally, do not include punctuation, such as dollar signs, percent signs, or commas in fields.

Filter Menu Functionality:

The filter fields fall into three general types:

Example:

1. Operators with user defined entries

Range:



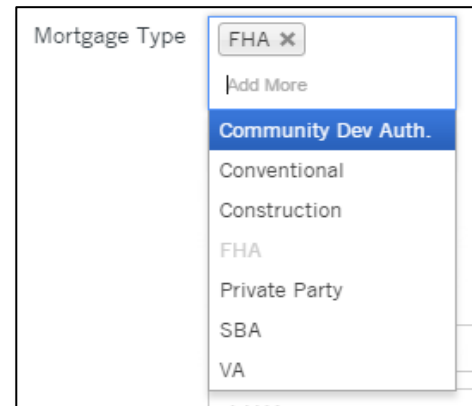
A filter field for 'Year Built' with a dropdown menu set to 'is between'. Two input boxes contain the values '1965' and '1975', separated by the word 'and'.

Single Entry:



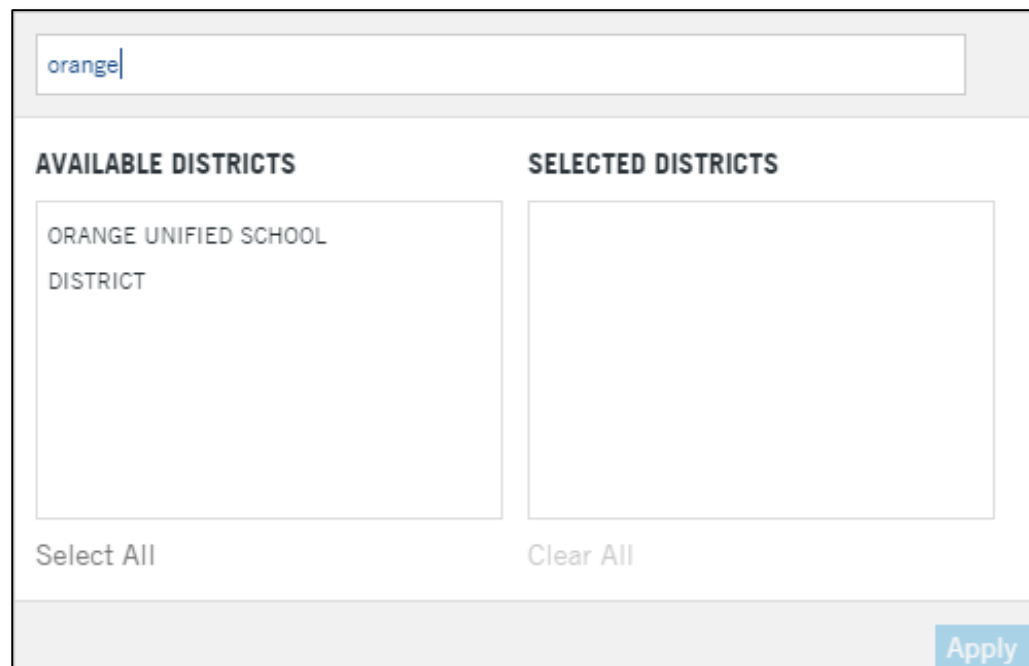
A filter field for 'Year Built' with a dropdown menu set to 'is'. An input box contains the value '1975'.

2. Drop Selection menus



A dropdown menu for 'Mortgage Type'. The selected item is 'FHA'. Other visible options include 'Add More', 'Community Dev Auth.', 'Conventional', 'Construction', 'FHA', 'Private Party', 'SBA', and 'VA'.

2. Search to Pick lists



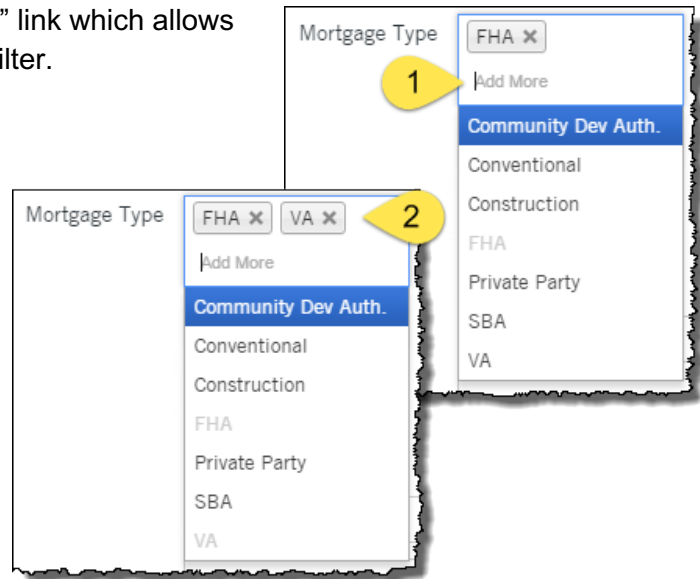
A search interface with a search bar containing 'orange'. Below the search bar are two columns: 'AVAILABLE DISTRICTS' and 'SELECTED DISTRICTS'. The 'AVAILABLE DISTRICTS' column contains one item: 'ORANGE UNIFIED SCHOOL DISTRICT'. Below this column is a 'Select All' button. The 'SELECTED DISTRICTS' column is empty. Below this column is a 'Clear All' button. At the bottom right of the interface is an 'Apply' button.

The second and third menu types have specific functionality reviewed below.

Drop Selection Menus

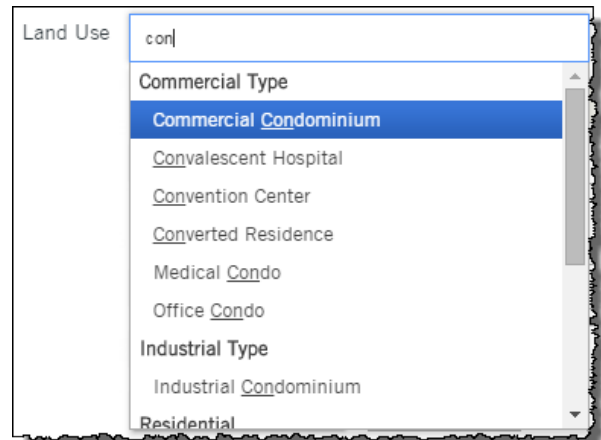
Drop Selection menus will include an “Add More” link which allows you to add multiple entries from the list into the filter.

In the example at right, this allows the selection of more than one mortgage type, not just a single entry, by clicking Add More. To remove a selection, click the “x”.



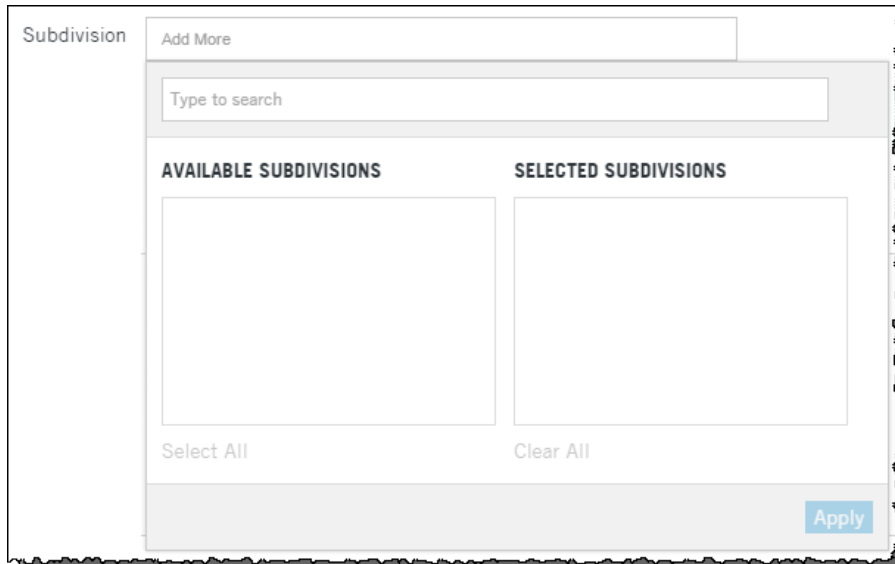
Additionally, these fields allow you to type directly into the field and the filter will search for matches as you type.

In this example, entering “con” in the Land Use field results in the following matches (underlined). Scroll down through the list to see additional suggestions.



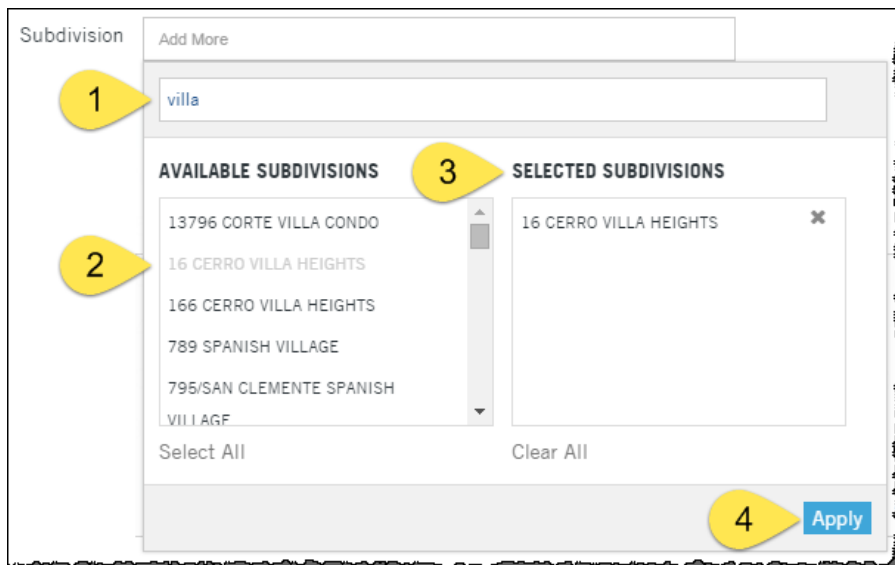
Search to Pick Lists

Search to Pick Lists allow for broader searches in fields with more diverse data. Examples where this filter is used include the Lender name, Title Company name, Subdivision, HOA name, etc.



The screenshot shows a search interface for 'Subdivision'. At the top, there is a search box with the placeholder text 'Type to search'. Below the search box are two columns: 'AVAILABLE SUBDIVISIONS' and 'SELECTED SUBDIVISIONS'. Both columns are currently empty. At the bottom of the 'AVAILABLE SUBDIVISIONS' column is a 'Select All' button, and at the bottom of the 'SELECTED SUBDIVISIONS' column is a 'Clear All' button. A blue 'Apply' button is located at the bottom right of the interface.

Enter the first few letters of the item (Subdivision, HOA, etc.) you are looking for (1) and the filter will provide matching entries (2). Click on an entry to move it to “Selected...” (3) and click Apply (4) when you are ready to add these to the query.



The screenshot shows the same search interface as above, but with the search box containing the text 'villa'. The 'AVAILABLE SUBDIVISIONS' column now contains a list of results: '13796 CORTE VILLA CONDO', '16 CERRO VILLA HEIGHTS', '166 CERRO VILLA HEIGHTS', '789 SPANISH VILLAGE', '795/SAN CLEMENTE SPANISH VILLAGE', and 'VILLAGE'. The 'SELECTED SUBDIVISIONS' column now contains one entry: '16 CERRO VILLA HEIGHTS'. Numbered callouts are present: '1' points to the search box, '2' points to the list of available subdivisions, '3' points to the '16 CERRO VILLA HEIGHTS' entry in the selected list, and '4' points to the 'Apply' button.

Working with Bundles:

Certain filters are grouped in Bundles. Bundles are sets of filters treated as a single unit. As an example: A farm requires 500-650 E Washington Street and another range of addresses on Firestone Drive. Bundles allow you to add and manage these two street number ranges and street names as discreet entries.

Bundles will remain in Edit mode, meaning you can continue to adjust the filters in that bundle, adding or removing options, as required. As you build the bundle, the filter will build the information in the query filter panel at right. When you have the first bundle ready, click Add to Search. This will complete the bundle and clear the selection area, allowing you add your next bundle.

Example: Figure 1, shows the Washington Avenue bundle in edit mode, allowing you to continue to add or modify the filter entries. When the information for this first bundle is complete, click Add to Search.

Figure 1:

The screenshot displays a web interface for location filtering. On the left, a panel titled 'LOCATION' is in edit mode. It contains an 'Address Bundle' section with the following fields: 'Street #' (is between 500 and 650), 'Pre Direction' (Add More), 'Street Name' (is Washington), 'Street Type' (Common Types: Avenue), 'Post Direction' (Add More), and 'Unit #' (is between). Below these fields is an 'Add to Search' button. On the right, a 'STATE & COUNTY BUNDLE' panel shows 'State: California' and 'County: Orange'. Below it, an 'ADDRESS BUNDLE' panel shows 'Street #: 500 - 650', 'Street Name: Washington', and 'Street Type: Avenue'.

Figure 2, shows the bundle after clicking Add to Search. The form has cleared and you can now add another bundle.

Figure 2:

Figure 3 shows the entry of the next address bundle. Again, note that the address information is still editable. Click Add to Search when the Firestone Drive bundle is complete.

Figure 3

Figure 4 shows the final set of address bundles after click Add to Search.

Figure 4

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 between [] and []

City is [] +

ZIP Code is [] +

APN is [] +

Add to Search

STATE & COUNTY BUNDLE

State California

County not Contra Costa

LOCATION

ADDRESS BUNDLE

Street # 500 - 650

Street Name Washington

Street Type Avenue

ADDRESS BUNDLE

Street # 200 - 700

Street Name Firestone

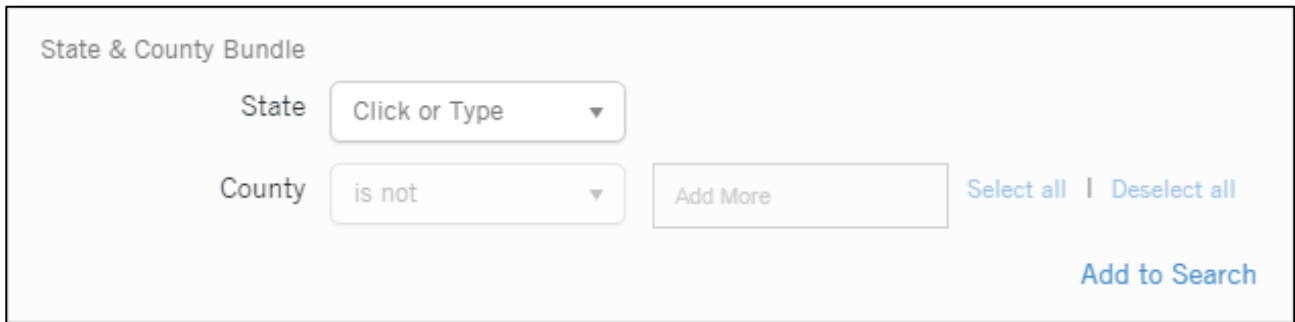
Street Type Drive

Edit or remove a completed bundle by clicking on the pencil or “x”, respectively.



State and County Bundle

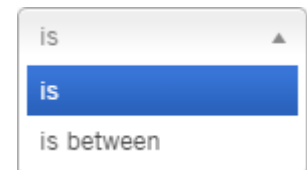
This is a stand-alone bundle at the top of the list.



The screenshot shows a search interface titled "State & County Bundle". It features two dropdown menus: "State" with the text "Click or Type" and a downward arrow, and "County" with the text "is not" and a downward arrow. To the right of the "County" dropdown is a button labeled "Add More". Further right are two links: "Select all" and "Deselect all". At the bottom right of the interface is a blue button labeled "Add to Search".

State: A drop select field. All 50 states plus the District of Columbia. Nationwide option is also included.

County: A drop select field. Will display the counties for the state selected. Uses the IS/IS NOT operator.




The screenshot shows a dropdown menu with three options: "is", "is", and "is between". The second "is" option is highlighted with a blue background.

Location Filters

Address Bundle

▼ LOCATION

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](#)

Field (in form order):

Street Number: Includes the operators for single numbers, ranges and odd/even ranges.

Pre Direction and Post Direction: A drop down list selection for all compass points (N, NE, E, SE, etc).

Street Name: Do not include pre- or post-directionals.

Additional Information:

is between ▲

is

is between

even range

odd range

is ▲

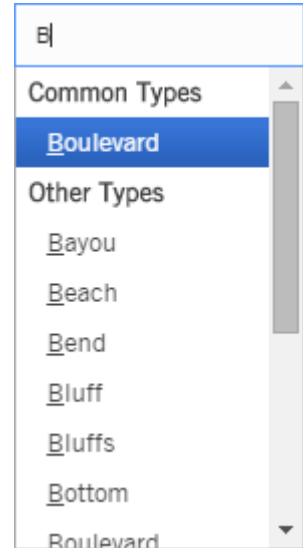
is

is not

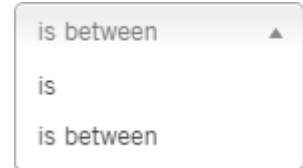
starts with

contains

Street Type: Drop down selection list of street types, such as Avenue, Boulevard, Court, etc. The list is text sensitive. Enter the first letter or letters of the type you are looking for and the list will attempt to suggest options.



Unit #: Uses an exact match (Is) and a range match (Is Between).



Location (Continued)

City	<input type="text" value="is"/>	<input type="text"/>	+
ZIP Code	<input type="text" value="is"/>	<input type="text"/>	+
APN	<input type="text" value="is"/>	<input type="text"/>	+
Tax Area	<input type="text" value="is"/>	<input type="text"/>	+
Subdivision	<input type="text" value="Please select a single county"/>		
Neighborhood Code	<input type="text" value="Please select a single county"/>		+
HOA Name	<input type="text" value="Please select a single county"/>		
School District	<input type="text" value="Please select a single county"/>		
Carrier Route	<input type="text"/>		+

Tract Block Lot Bundle

Tract	<input type="text" value="is"/>	<input type="text" value="Please select a single county"/>
Block	<input type="text" value="is"/>	<input type="text" value="Please select a single county"/>
Lot	<input type="text" value="is"/>	<input type="text" value="Please select a single county"/>

[Add to Search](#)

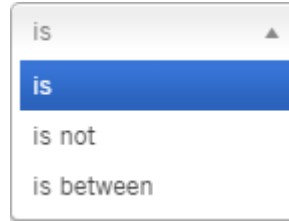
Field (in form order):

City: Text entry only; operators will allow for partial matches.

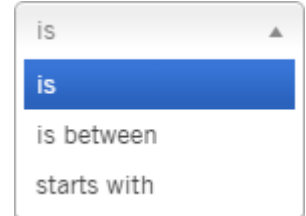
Additional Information:

A dropdown menu with a scroll arrow at the top right. The menu items are: 'is' (highlighted in blue), 'is not', 'starts with', and 'contains'.

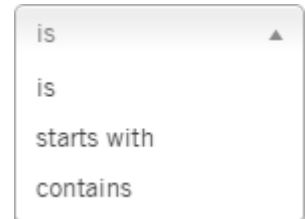
Zip Code: Numeric entry; operators will allow for ranges and exclusions.



APN: Text and numeric entry; the APN can be formatted or unformatted and the field will search the alternate APNs.

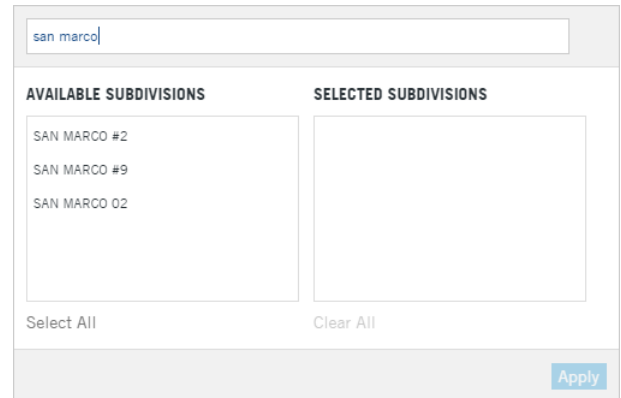


Tax Area: Text and numeric entry.



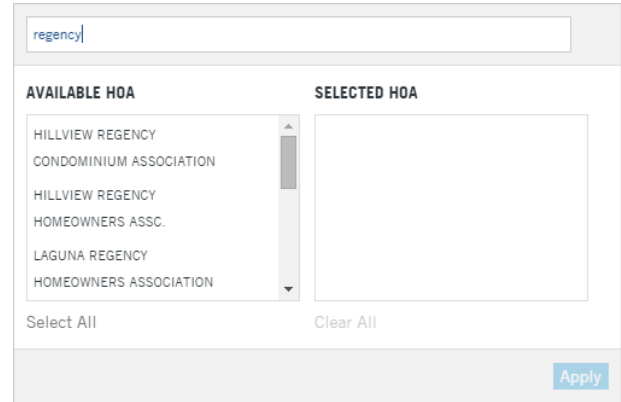
Subdivision: Search to pick list. Requires a State and County selection.

NOTE: Not all counties populate the subdivision field.



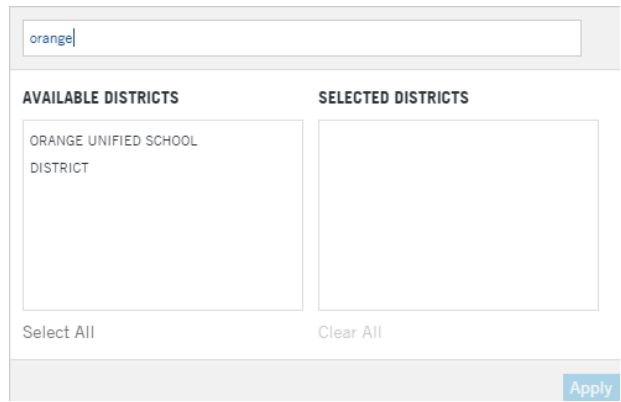
Neighborhood Code: No drop down list; primarily for King County, WA. Accepts numeric values.

HOA Name: Search to pick list. Requires a State and County selection.



A screenshot of a web interface for selecting an HOA. At the top, there is a search input field containing the text "regency". Below the search field, the interface is divided into two columns: "AVAILABLE HOA" and "SELECTED HOA". The "AVAILABLE HOA" column contains a list of HOA names: "HILLVIEW REGENCY", "CONDOMINIUM ASSOCIATION", "HILLVIEW REGENCY", "HOMEOWNERS ASSC.", "LAGUNA REGENCY", and "HOMEOWNERS ASSOCIATION". A vertical scrollbar is visible on the right side of this list. The "SELECTED HOA" column is currently empty. Below the "AVAILABLE HOA" list are two buttons: "Select All" and "Clear All". Below the "SELECTED HOA" list are two buttons: "Clear All" and "Apply". The "Apply" button is highlighted in blue.

School District: Search to pick list. Requires a State and County selection.



A screenshot of a web interface for selecting a school district. At the top, there is a search input field containing the text "orange". Below the search field, the interface is divided into two columns: "AVAILABLE DISTRICTS" and "SELECTED DISTRICTS". The "AVAILABLE DISTRICTS" column contains a list of school district names: "ORANGE UNIFIED SCHOOL DISTRICT". The "SELECTED DISTRICTS" column is currently empty. Below the "AVAILABLE DISTRICTS" list are two buttons: "Select All" and "Clear All". Below the "SELECTED DISTRICTS" list are two buttons: "Clear All" and "Apply". The "Apply" button is highlighted in blue.

Carrier Route: Enter the post office carrier route.

Tract, Block, Lot: Text and numeric field. This is a bundle field. Click Add to Search to add additional bundles.

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

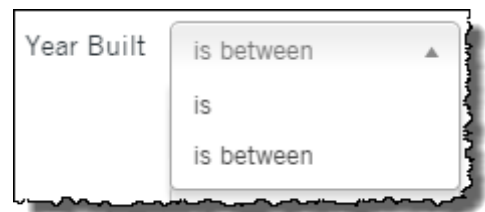
Stories ▼ and

Pool ▼

Garage Spaces ▼ and

of Units ▼ and

NOTE: Where provided, all filters use the Is / Is Between modifier.



Field (In form order);

Land Use: Drop-selection of choices from Agriculture Types to Vacant Land Types. Each Type selection contains subgroups in a cascading menu.

County Land Use: Numeric value input in the assessment of property for tax purposes.

Zone Code takes numeric and alpha values.

TIP: Zone codes are county specific. Check the Property Detail Report in the Site Information Section, Zoning field for examples.

Site Influence Is a drop selection. Each selection has more types in a cascade menu.

TIP: The data in the Site Influence field is from County Assessor’s records. 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: Four character numeric field.

Additional Information:

RES|

Commercial Type

- Converted Residence
- Office & Residential
- Restaurant Building
- Restaurant Drive In
- Stores & Residential

Residential

- Cabin
- Condominium
- Cooperative

10|

AVAILABLE USE CODES	SELECTED USE CODES
103-RELIGIOUS	
104-RESEARCH & DEVELOPMENT	
106-RESIDENTIAL	
110-RESTAURANT	

Select All Clear All

Apply

water|

Lot Location

- ISLAND NO WATERFRONT

View

- INLAND WATERWAY
- INTERCOASTAL WATERWAY
- WATER
- WATER VIEW
- Water
- BAY
- BAY ACCESS

Living Area (SQFT): Numeric value input. This value is in the Property Characteristics section of the Property Detail report.

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

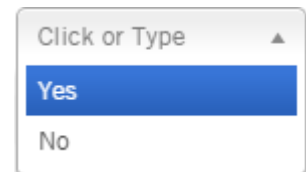
Lot Area: A numeric value.

Lot Acreage: Takes a numeric value. Values can be in decimal form.

Stories: Takes a numeric value.

Garage Spaces: Takes a numeric value.

Pool: Drop-selection between Yes and No; leave blank if you have no preference.



of Units: Takes a numeric value.

Owner

▼ OWNER

Owner Last Name +


Owner First Name +

Owners (All) +

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

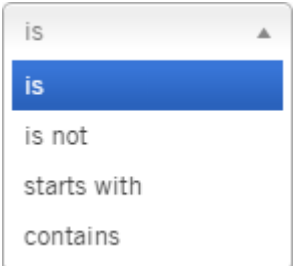
Exemption [Select all](#) | [Deselect all](#)

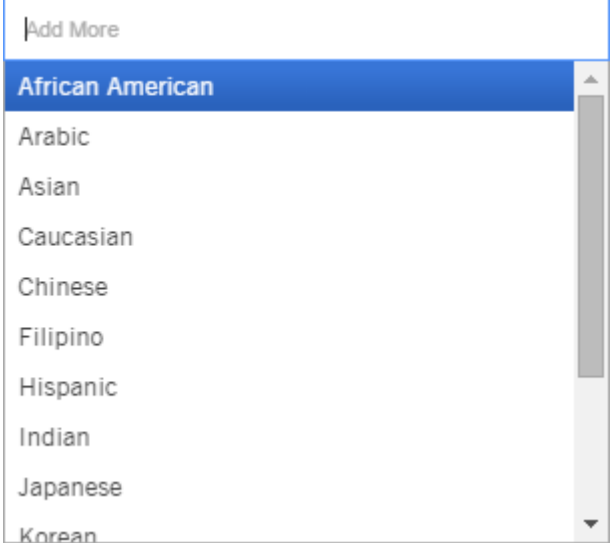
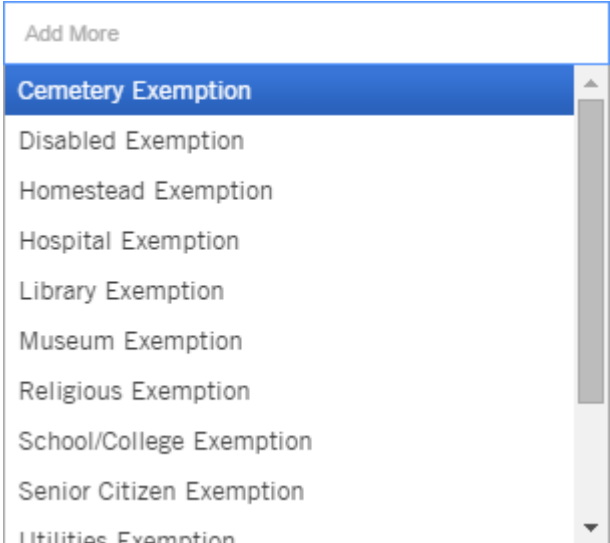
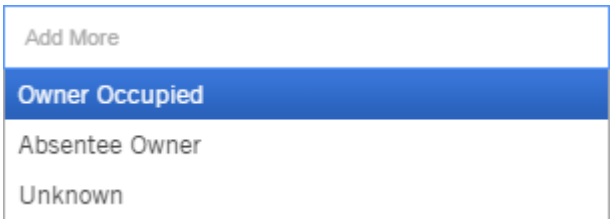
Owner Occupied [Select all](#) | [Deselect all](#)

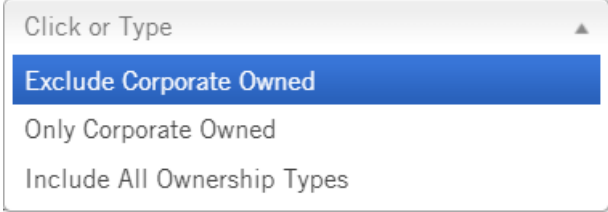
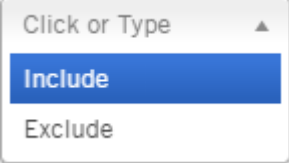
 Properties Owned and

Corporate Owned

Do Not Mail

Fields (in form order)	Additional Notes:
<p>Owner Last Name, Owner First Name and Owner (Other): Alpha characters.</p>	

<p>Owner Ethnicity: Drop-selection of 14 ethnic types.</p>	
<p>Exemption is a drop-selection of 13 exemption types.</p>	
<p>Owner Occupied: Drop select field. Leave blank to include Owner Occupied, Absentee and Unknown occupancy.</p>	
<p>Properties Owned: Specific number or range.</p>	<p>Enter the number of properties or the range of properties to search for. Designed to create mailing lists for individuals that own more than one property.</p>

<p>Corporate Owned: Drop selection field.</p>	
<p>Do Not Mail: Drop-selection; leave blank to include all records regardless of Do Not Mail flag.</p>	

Owner – Mailing State and County Bundle

Mailing State & County Bundle

Mailing State

Mailing County [Select all](#) | [Deselect all](#)

[Add to Search](#)

Fields (in form order)

Additional Notes:

Mailing State: Drop-selection of States.

Mailing County: Drop-selection of available counties. Select the State to activate this field.

Owner – Mailing Address Bundle

Functionality and field definition is the same as the Address Bundle describe above. The only difference is that these fields filter against the mailing addresses.

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

Field (in form order):

Mailing Street #: Includes the operators for single numbers, ranges and odd/even ranges.

Mailing Pre Direction and Mailing Post Direction: A drop selection for all compass points (N, NE, E, SE, etc).

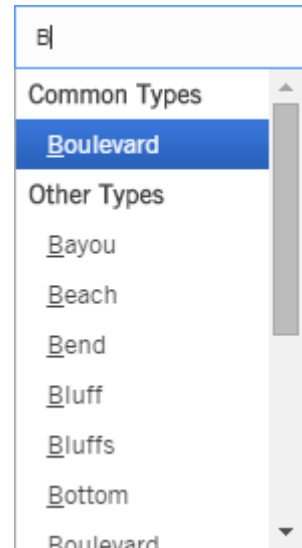
Mailing Street Name: Do not include pre- or post-directionals in this field.

Additional Information:

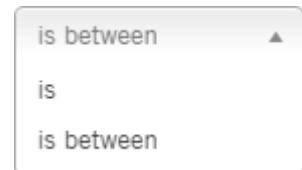
- is between ▲
- is
- is between
- even range
- odd range

- is ▲
- is
- is not
- starts with
- contains

Mailing Street Type: Drop select list of street types, such as Avenue, Boulevard, Court, etc.



Mailing Unit #: Numeric input field.



Owner - Mailing City and Zip Code

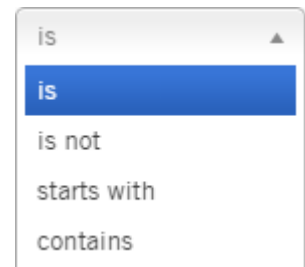
These two fields are separated from the Mailing Address Bundle should you wish to filter only by mailing city or zip code.



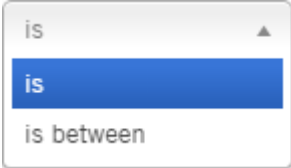
Field (in form order):

City: Text entry only.

Additional Information:



Zip Code: Numeric entry.



Owner – International Mailing Bundle

International Mailing Bundle

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

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

Canadian Mailing City

Canadian Mailing Postal Code

[Add to Search](#)

Field (in form order)

Mailing Country: A drop select of countries. In order to use the Canadian address, make sure to select “Canada”. Not all records have complete mailing addresses for other countries.

Additional Information:

Canadian Mailing Provinces: Drop select list.

Add More

- Alberta
- British Columbia
- Manitoba
- New Brunswick
- Newfoundland and Labrador
- Nova Scotia
- Northwest Territories
- Nunavut
- Ontario
- Prince Edward Island

Canadian Mailing City: Enter the city name.

Canadian Mailing Postal Code: Enter the postal code

Note: All three Canadian Mailing fields Is/Is Not filter modifier.

is

is

is not

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](#)

Field (in form order)

Transaction Type: Drop selection.

- Sale (Arms-Length): Full value transfer between unrelated parties.
- Ownership Transfer (Non-Arms Length): Vesting changes, such as a quit claim deed or interspousal transfer.
- Latest Transaction: Any of the above.

Sales Price: Numeric value input.

Additional Information:

Click or Type ▲

Sale (Arms-length)

Ownership Transfer (Non-arms-length)

Latest Transaction

is ▲

is

is between

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

- Add More
- Confirmed
- Estimated
- Full Value
- Committed
- Not Disclosed
- Partial
- Lease
- Unknown
- Verified

Last Sale Date and Last Sale Recording Date: Drop-selections for the Last 3, 6, 12 and 24 Months. Custom dates are allowed.

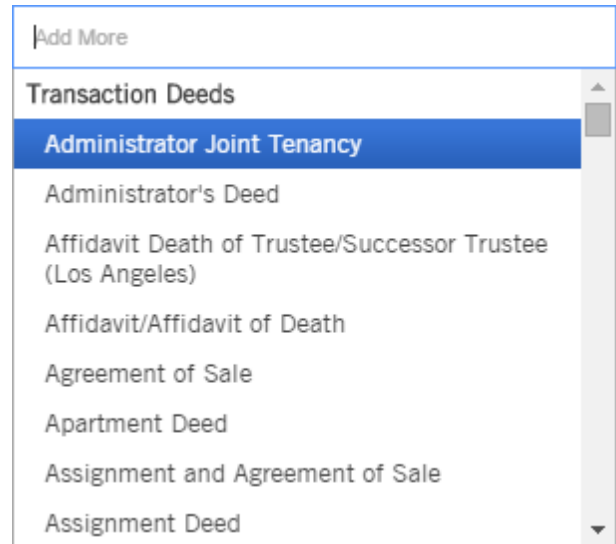
- is between
- is
- is before
- is after
- is last 3 mo
- is last 6 mo
- is last 12 mo
- is last 24 mo

Recording Month: Drop-selection of any one of twelve months.

Seller Name: Enter the last name of the seller. Include, exclude, starts with and contains for broader search options.

- is
- is not
- starts with
- contains

Transaction Deed Type: Drop-selection from Deed, Quitclaim, Trust Deed/Mortgage, Foreclosure, and many others.



Financing Information

▼ FINANCING 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

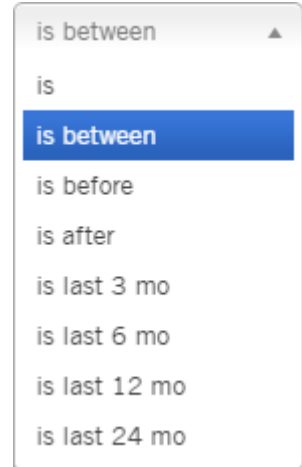
Fields (in form order)

Mortgage Amount: Takes a numeric input value.

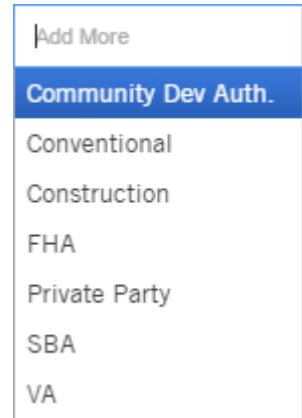
TIP: This is the mortgage origination amount, as specified on the origination document. Current balances are not available in DataTree.

Additional Information:

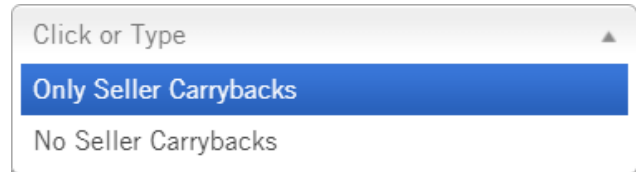
Mortgage Recording Date: Drop-selection from Last 3, 6, 12 and 24 Months. You can insert custom dates.



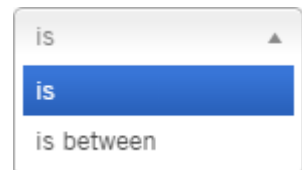
Mortgage Type: Drop-selection of seven mortgage types.



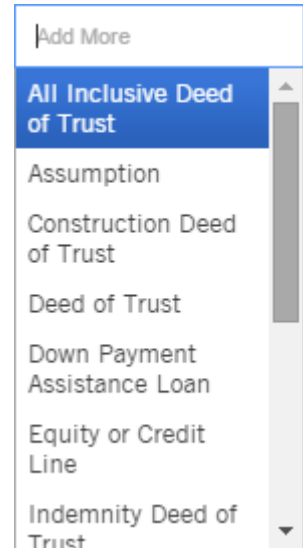
Seller Carryback: Drop selection.



Interest Rate: Numeric input value.
TIP: Interest rates are only available on properties with Adjustable Rate mortgages.

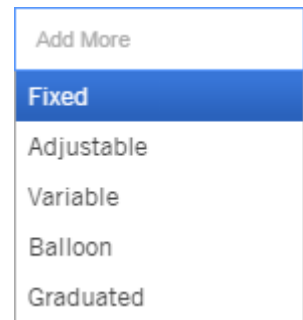


Financing Deed Type: Selections for the type of deed used. Includes options such as Construction Deeds, Loan Modifications, Deeds of Trust, Mortgages, Revolving Line of Credit, etc.



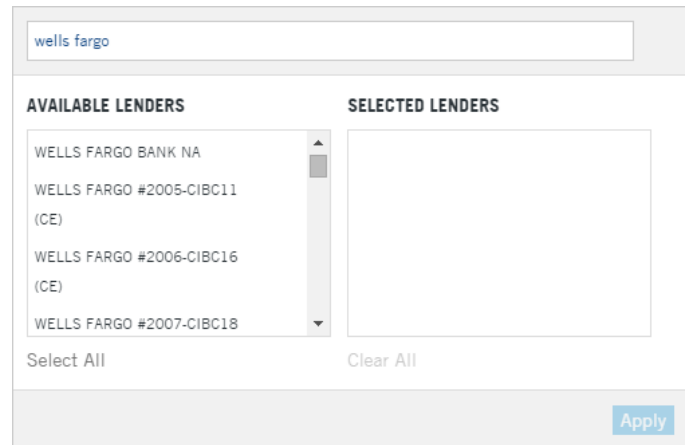
A dropdown menu with a search bar containing the text "Add More". The menu is open, showing a list of options. The first option, "All Inclusive Deed of Trust", is highlighted in blue. Other options include "Assumption", "Construction Deed of Trust", "Deed of Trust", "Down Payment Assistance Loan", "Equity or Credit Line", and "Indemnity Deed of Trust".

Interest Rate Type: Drop-selection of five interest types from Fixed to Graduated.



A dropdown menu with a search bar containing the text "Add More". The menu is open, showing a list of options. The first option, "Fixed", is highlighted in blue. Other options include "Adjustable", "Variable", "Balloon", and "Graduated".

Original Lender Name: Search to pick list.



A search interface for selecting lenders. At the top, there is a search bar with the text "wells fargo". Below the search bar, there are two columns: "AVAILABLE LENDERS" and "SELECTED LENDERS". The "AVAILABLE LENDERS" column contains a list of four items: "WELLS FARGO BANK NA", "WELLS FARGO #2005-CIBC11 (CE)", "WELLS FARGO #2006-CIBC16 (CE)", and "WELLS FARGO #2007-CIBC18". The "SELECTED LENDERS" column is currently empty. Below the "AVAILABLE LENDERS" list, there is a "Select All" button. Below the "SELECTED LENDERS" list, there is a "Clear All" button. At the bottom right of the interface, there is an "Apply" button.

Title Company: Search to pick list.

new world

AVAILABLE TITLE COMPANIES

- NEW WORLD
- NEW WORLD ABSTRACT
- NEW WORLD ABSTRACT CO
- NEW WORLD TITLE
- NEW WORLD TITLE & ESCROW

SELECTED TITLE COMPANIES

Select All Clear All

Apply

Finance Scores

Propensity score measuring the likelihood of a homeowner to seek a purchase or refinance mortgage.

FINANCE SCORES ?		
\$ Purchase Intel Score	Add More	Select all Deselect all
\$ Refi Intel Score Conventional	Add More	Select all Deselect all
\$ Refi Intel Score FHA	Add More	Select all Deselect all
\$ Refi Intel Score Cash-out	Add More	Select all Deselect all
\$ Equity Intel Score	Add More	Select all Deselect all

Field

Purchase Intel Score
Refi Intel Score Conventional
Refi Intel Score FHA
Refi Intel Score Cash-out
Equity Intel Score

Likelihood is within three to six months.

Additional Information

Add More
Very High Likelihood
High Likelihood
Above Average Likelihood

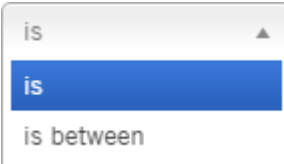
Each score estimates the likelihood of securing one of those types of mortgages within the next three to six months. For example, the Refi Intel Score Conventional indicates the likelihood of an individual securing a conventional refinance in the next three to six months.

Assessor Values

NOTE: The various County Assessor's offices provide the Assessed, Market and Appraised values. Counties do not necessarily populate each category. Check the Property Detail Report > Tax Information section to see if the selected county provides this information.

▼ 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 fields in the Values group use the Is/Is Between modifier.



A dropdown menu with a light gray background and a blue highlight on the selected item. The selected item is 'is'. Below it, the option 'is between' is visible.

Values follow the same definitions:

Fields (in form order):

Total Value: This is simply the sum of the Land Value and Improvement Value; numeric input value; can be done as a range search

Land Value: Value of the land only; numeric input value.

Improvement Value: Improvements to the property; numeric input value.

Improvement %: The improvement value expressed as a percentage; numeric input value.

Equity

▼ EQUITY

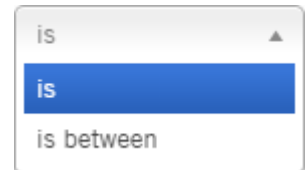
Equity Value is between and

Equity % is between and

Field (in form order)

Additional Information

Equity Value and Equity %: Range or specific value using the Is/Is Between operators.



is ▲
is
is between

Equity Value: An internally derived estimated dollar value based upon the Estimated Current Value minus the sum of the origination amount of all open liens. Numeric input value.

Equity %: The Equity Value expressed as a percentage. Numeric input value.

TIP: It is easier to search for homeowners who have “70% - 100%” equity percent than by searching using a dollar range. Stated differently, is “\$500,000 to \$1,000,000” in Equity Value the same as 70% - 100% equity?

NOTE: Equity Value and Equity Percentage can be negative. To search for properties with negative equity use the following pattern for your range. The entry must be ascending order.

Equity Value is between and

Equity % is between and

Market Value

▼ MARKET VALUE

Estimated Value is between and

Field (in form order)

Additional Information

Estimated Value: Enter the value or value range.
Uses the Is/Is Between operator.

The field uses the data from the First American
AVM

Listing Information

▼ LISTING INFORMATION

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

Listing Date and

Listing Price and

Field (in form order)

Listing Status: Drop-selection of choices from Active, Pending, and Contingent.

Listing Date: Drop-selection from Last 3, 6, 12 and 24 Months plus option for specific date and custom date ranges.

Listing Price: Takes a numeric input value.

Additional Information

Add More

Active

Pending

Contingent

is between ▲

is

is between

is before

is after

is last 3 mo

is last 6 mo

is last 12 mo

is last 24 mo

is ▲

is

is between

Foreclosure Information

Note: Foreclosures are setup as a bundle. See the Working with Bundles section at the beginning of this document for more information.

▼ FORECLOSURE INFORMATION

Foreclosure Bundle

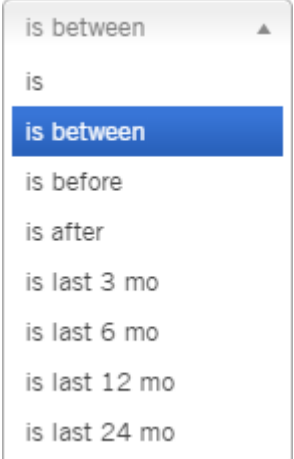
Foreclosure Status

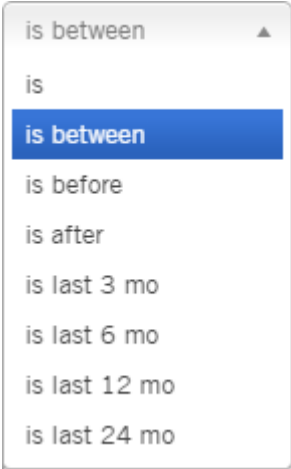
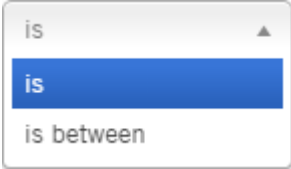
Foreclosure Recorded Date and

Foreclosure Event Date and

Foreclosure Amount and

[Add to Search](#)

Fields (in form order)	Additional Information:
<p>Foreclosure Status: Drop-selection of choices: Default, Auction, REO, REO Sale and Short Sale. This is a mandatory field; Date, Event, and Amount fields will not activate otherwise.</p> <p>The Dates and Amount filters below, will affect the selected Foreclosure status.</p>	<p>Default: The homeowner has failed to pay their mortgage for a certain period of time.</p> <p>Auction: The property is scheduled to be sold at auction to recover the outstanding balance.</p> <p>REO: The property was not sold at auction and has returned to the lien holder. The lien holder now holds title to the property.</p> <p>REO Sale: The last market sale was from the lienholder to a private individual.</p> <p>Short Sale: Describes the sale of a property where the sale amount is less than the origination amounts of the open liens.</p>
<p>Foreclosure Recorded Date: The recording date of the selected foreclosure status.</p>	

<p>Foreclosure Event Date: The date a foreclosure activity occurred. This field is dependent upon the Foreclosure Type selected. For example, if you select “Auction” you can then select a date range looking forward to when the auction is scheduled. If you were to select REO Sales, then you would use this field to search for the actual sales date, not the recording date.</p>	
<p>Foreclosure Amount: Numeric input value.</p>	

HOA Lien

▼ HOA LIEN

\$
Open HOA Lien Present
Click or Type ▼

Fields (in form order)	Additional Information:
<p>Open HOA Lien Present:</p>	<p>Yes/No field to include or exclude properties with an open HOA Lien. Leave blank for all records regardless of the presence of an HOA Lien.</p>