

# DataTree<sup>®</sup> ACADEMY

## ADVANCED SEARCH FILTERS & MAILING LISTS

Rev. 20201015



**Contents**

Overview..... 2  
Where - The Map and Location Filter: ..... 3  
What – What are your looking for? ..... 4  
Managing Filters: ..... 10  
Exports: Ways to Use Your Mailing List ..... 11

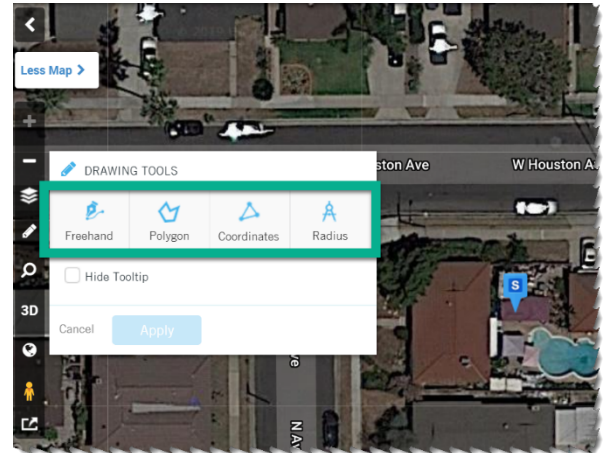
**Overview**

Mailing lists can be accomplished using the filters and/or the interactive map. When building your mailing lists, consider two basic questions: 1.) Where are you searching and 2.) What are you searching for?

## Where - The Map and Location Filter:

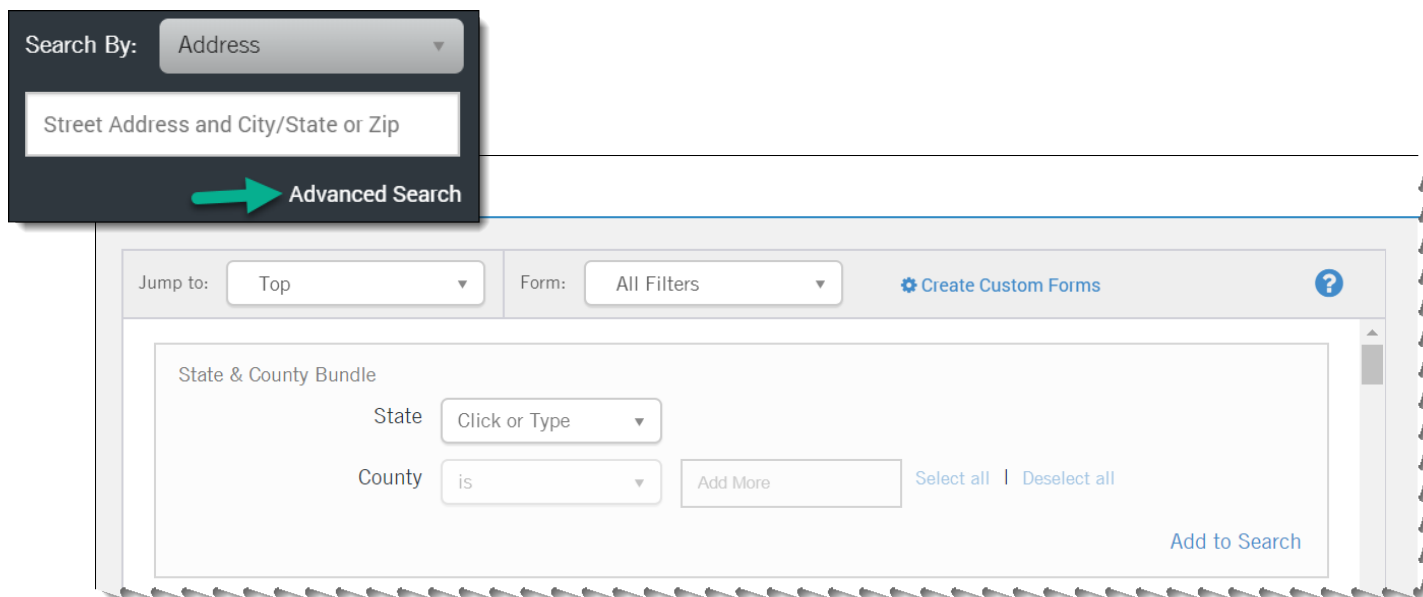
*Using the Map:* The map has four drawing tools that can be used to select properties directly from the map. Properties within the drawn shape will be included in your list. Clicking APPLY will set the drawn area for your search and return the number of properties in the area.

*Using the Location tab in the Filters:* You can select from a variety of geographies to narrow your search. From the Location tab, select a zip code range, street number ranges and street name, APNs, or subdivisions (must be used with the county option).



**TIP:** Before moving to the next tab, click the SEARCH button to establish the number of records in the selected geography.

**NOTE:** DataTree allows for nationwide searches by using the **Advanced Search** and simply adding characteristics, transaction, distressed or owner filters.



### What – What are your looking for?

*Characteristics:* The physical characteristics of the properties. What kind of property are you looking for? A single family home with three to four bedrooms and two to three bathrooms? How about the lot size? Or is the property influenced by the surrounding area (also known as the “site influence) such as lakes and waterfront? Please remember that the data about the physical characteristics of a property are supplied by the County Assessor’s office and may vary from county to county.

This section provides selections for land use code and a host of other options that focus on the properties physical characteristics. This includes values provided by the County Assessor’s and estimated current values and equity estimates.

**▼ 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

**Sale/Financing Information:** Sales, mortgage and listing 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](#)

**▼ 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

Number of Open Liens  [Select all](#) | [Deselect all](#)

**Finance Scores:** Provides an estimate of the likelihood (or propensity) for a homeowner to secure a new mortgage.

**▼ FINANCE SCORES ?**

Purchase Intel Score  [Select all](#) | [Deselect all](#)

Refi Intel Score Conventional  [Select all](#) | [Deselect all](#)

Refi Intel Score FHA  [Select all](#) | [Deselect all](#)

Refi Intel Score Cash-out  [Select all](#) | [Deselect all](#)

Equity Intel Score  [Select all](#) | [Deselect all](#)

**Foreclosure Information:** Properties in the foreclosure process.

The following statuses are available.

**Default:** The homeowner has been served with a delinquency notice.

**Auction:** The homeowner has been served with a notice that the home will be sold at auction. This categorization can be used by investors to look for homes prior to the auction date.

**REO:** The home has been repossessed by the servicing institution.

**REO Sale:** A home that was sold from an institution to a private individual. The home is not owned by the servicing institution at this point. The categorization indicates a historical transaction.

**Short Sale:** A home that was sold to a private individual, typically during the default process and before the home entered REO status. This determination is made by the sale amount being less than the origination amount of the loan. The categorization indicates a historical transaction.

**▼ FORECLOSURE INFORMATION**

Foreclosure Bundle

Foreclosure Status

Foreclosure Recorded Date   and

Foreclosure Event Date   and

Foreclosure Amount   and

[Add to Search](#)

**Owner:** Search for owner names, exemptions, or by mailing address.

**▼ 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  ▼

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**Mailing State & County Bundle**

Mailing State   ▼

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

[Add to Search](#)

---

**Mailing Address Bundle**

Mailing Street #   and

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

Mailing Street Name

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

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

Mailing Unit #

[Add to Search](#)

---

Mailing City   +

Mailing ZIP Code   +

---

**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](#)

**Market Data:** These filters allow restricting search results by assessor values, equity, market values, and listing information.

**▼ EQUITY**

Equity Value  and

Equity %  and

**▼ ASSESSOR VALUES**

Assessed Total Value  and

Assessed Land Value  and

Assessed Improvement Value  and

Assessed Improvement %  and

Market Total Value  and

Market Land Value  and

Market Improvement Value  and

Market Improvement %  and

Appraised Total Value  and

Appraised Land Value  and

Appraised Improvement Value  and

Appraised Improvement %  and

**▼ MARKET VALUE**

Estimated Value  and

**▼ LISTING INFORMATION**

Listing Status   [Select](#)

Listing Date  and

Listing Price  and



**PACE Financing:** Allows filtering by open PACE Liens and values.

▼ **PACE FINANCING**

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

💰 PACE Loan Recording Date  ▼  and

💰 PACE Loan Amount  ▼  and

**HOA Lien:** Allows for filtering search results by open HOA Liens.

▼ **HOA LIEN**

💰 Open HOA Lien Present  ▼

# Managing Filters:

As you build your filters, they will appear on the right-hand side of the DataTree window under the Advanced Search panel.

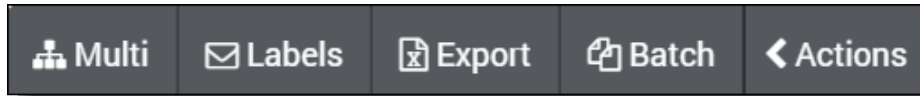
The will list the different filter criteria you have selected.

Filters can be removed by clicking on the “x” to the right of each filter. All filters can be removed using the **Clear All** option at the bottom of the panel.

The screenshot shows the Advanced Search panel with the following elements:

- Top right: **0 results**, [Get Count](#), [View Results](#) (highlighted), and [Export](#).
- OWNER** section:
  - Owner Last Name: [smith x](#)
- FORECLOSURE INFORMATION** section:
  - FORECLOSURE BUNDLE** (with edit and close icons):
    - Foreclosure Status: [Short Sale](#)
    - Foreclosure Recorded Date: [12/31/2018 - 02/02/2019](#)
- Bottom left: [x Clear All](#)

## Exports: Ways to Use Your Mailing List



**ORDER MULTI PROPERTY REPORTS** ✕

**TOTAL PROPERTIES: 74**

- Single Line Report**
- Five Line Report
- Seven Line Report
- Walking Five Line Report
  - Include Reference Report
- Market Statistics Report
- Assessor Maps (De-Duplicated)

Reference ID   Remove Duplicate Owners

Cancel Order

**Multiline Reports (Multi):** Turning your list into a multi-line report.

Select one of the report options and click Order to generate your report.

SINGLE LINE REPORT							REFERENCE ID: COUNTY DATA AS OF: 01/04/2016 NUMBER OF PROPERTIES: 126		
	PARCEL NUMBER	OWNER NAME	SITE ADDRESS	BD	BA	SQFT	LOT	YB	
1	006-440-39-100	HART PETER G   HART ...	610 RIVER RD, COLOMA, CA 95613	6	3   0	3,120	30,928	1980	
2	110-460-85-100	MABOURAKH SHAHRIAR...	3 LAGO DEL REY CT, EL DORADO HILLS, CA...	7	3   1	5,981		2001	
3	110-581-14-100	SEYMOUR DAVID   SEYM...	1468 LAKEHILLS DR, EL DORADO HILLS, CA...	5	3   0	3,105	32,234	1976	
4	110-611-11-100	WILLIAMS WADE A   SC...	2162 OUTRIGGER DR, EL DORADO HILLS, C...	5	3   1	5,047		2005	
5	020-041-21-100	ASPEN COVE GENERAL ...	SOUTH LAKE TAHOE, CA 96150	5	3   0	2,355	52,708	1960	
6	022-312-11-100	PERRY-SMITH ROBERT T...	1991 ALOHA DR, SOUTH LAKE TAHOE, CA ...	5	3   0	3,428		1989	

**Labels:** Creating a PDF file that can be printed on Avery labels.

✉ ORDER LABELS
✕

**Total Properties**  
**74**

**Address Format**

Mailing  Property

Include APN

**Owner Name Options**

Last, First  First, Last

or Current Resident

Replace owner name with customized label

Current Resident

**Do Not Mail**

Exclude  Remove Duplicate Addresses

**Sort Order**

Site Address  Mail Address  APN  Owner Name

**Case Conversion**

All Capitals  Upper / Lower

**Label Preference**

Avery 5160  
1" x 2-5/8"  Avery 5161  
1" x 4"  Avery 5162  
1-1/3" x 4"

**Alignment**

Left Justify  Center  Right Justify

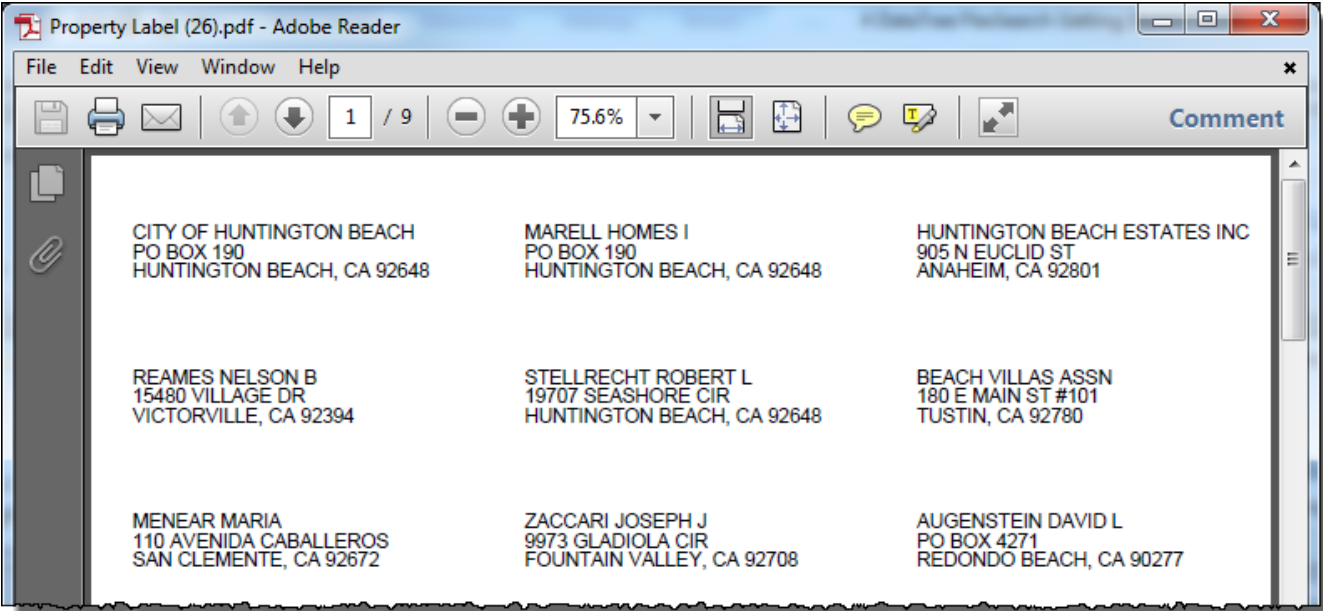
**File Format**

PDF  DOCX

Cancel
Order

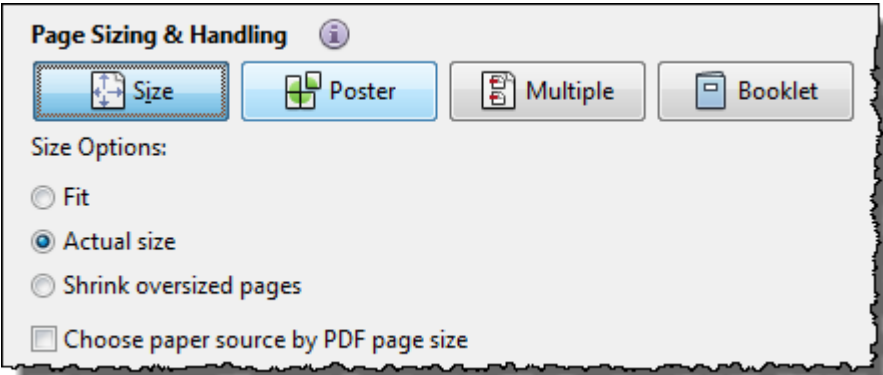
<p><b>Barbara B Corneille &amp; Corneille Liv</b> Trust Of 3/19/9 or Current Resident 112 Lark Ct Alamo, CA 94507</p>	<p><b>Jonatkim Enterprises</b> or Current Resident 627 S Manchester Ave Anaheim, CA 92802</p>	<p><b>Stephen Roy &amp; Terry P Miller</b> or Current Resident 29 Atherton Ave Atherton, CA 94027</p>
<p><b>Tom &amp; Terri Jamieson</b> or Current Resident PO Box 82515 Bakersfield, CA 93380</p>	<p><b>John A &amp; Donna J Schneider</b> or Current Resident 651 Woodmont Ave Berkeley, CA 94708</p>	<p><b>Wellington S Henderson &amp; Richard L Greene</b> or Current Resident 1325 Howard Ave Burlingame, CA 94010</p>
<p><b>Green Banker Ca Llc</b> or Current Resident</p>	<p><b>Marcia Custodian Giusti &amp; Yolanda Custodian Thompson</b></p>	<p><b>Allan Family Ca</b> or Current Resident</p>

**Labels Continued:** When printing labels, your printer software and hardware will make a difference in how the labels are printed. Save your labels to a convenient location, such as your desktop. From the desktop (or the download location) double-click the pdf to open the labels in Adobe Acrobat.



Click the Print button to open Acrobat’s print dialog box.

In the Size Options section, select “Actual Size”. This will ensure that the printer’s software does not adjust the labels to its defaults. There will be variations between the printer hardware and the software drivers used. It is recommended that you print on plain paper to test the settings of your printer and printer’s software.



Make any other selections as appropriate and click Print.

**Export:** Pulling your data into a csv (Excel) file.

The screenshot shows the 'ORDER EXPORT' window. At the top left, it says 'ORDER EXPORT' with a close button. Below that, 'TOTAL PROPERTIES: 74' is displayed. To the right of this is a dropdown menu labeled 'Apply a Template'. Below the total properties, there are two columns: 'AVAILABLE FIELDS' and 'SELECTED FIELDS'. The 'AVAILABLE FIELDS' column lists several options with checkboxes: 'Mailing Label Export', 'Property Characteristics Export' (checked, with '191 Selected' next to it), 'Property Detail Export', 'Finance Scores Export Add-on', 'Foreclosure Detail Export Add-on', 'HOA Contact Export Add-on', 'HOA Lien Export Add-on', 'Open Lien Export Add-on', and 'PACE Liens Export Add-on'. The 'SELECTED FIELDS' column lists the following fields: 'Owner 1 Full Name', 'Owner 1 First Name & MI', 'Owner 1 First Name', 'Owner 1 Last Name', 'Owner 2 Full Name', 'Owner 2 First Name & MI', 'Owner 2 First Name', 'Owner 2 Last Name', 'Owner Name 3 Full', 'Owner Name 4 Full', 'Owner Mailing Name', and 'Owners (All)'. To the right of the 'SELECTED FIELDS' column are two links: 'Add Blank Column' and 'Clear Selections'. At the bottom of the window, there is a section for export options. It includes a text input for 'Export File Name', a dropdown for 'Excel-Friendly .CSV', and another dropdown for 'All Capitals'. There are also checkboxes for 'Remove Duplicate Owners', 'Export All Records' (selected), and 'Export From' and 'To' fields. On the right side of this section are three buttons: 'Save as Template', 'Cancel', and 'Order'.

Three primary and six secondary export options are available. Only one primary can be selected per export. Secondary options only become available after a primary is selected.

**Mailing Label (primary):** This includes the essential fields necessary to create mailing labels through a mail merge, such as in Microsoft Word.

**Property Characteristics (primary):** Includes all fields from the Mailing Label export and adds the fields with the Property Characteristics. See the Property Characteristics, Location Information, and the Tax Sections of the Property Detail report for the fields.

**Property Detail (primary):** This export contains every field on the Property Detail Report. Essentially, includes everything in the first two options plus the balance of the fields from the Property Detail Report. As each of the first three lists builds on the previous, there is no need to select more than one.

**Finance Scores (secondary):**

**Foreclosure Detail (secondary):**

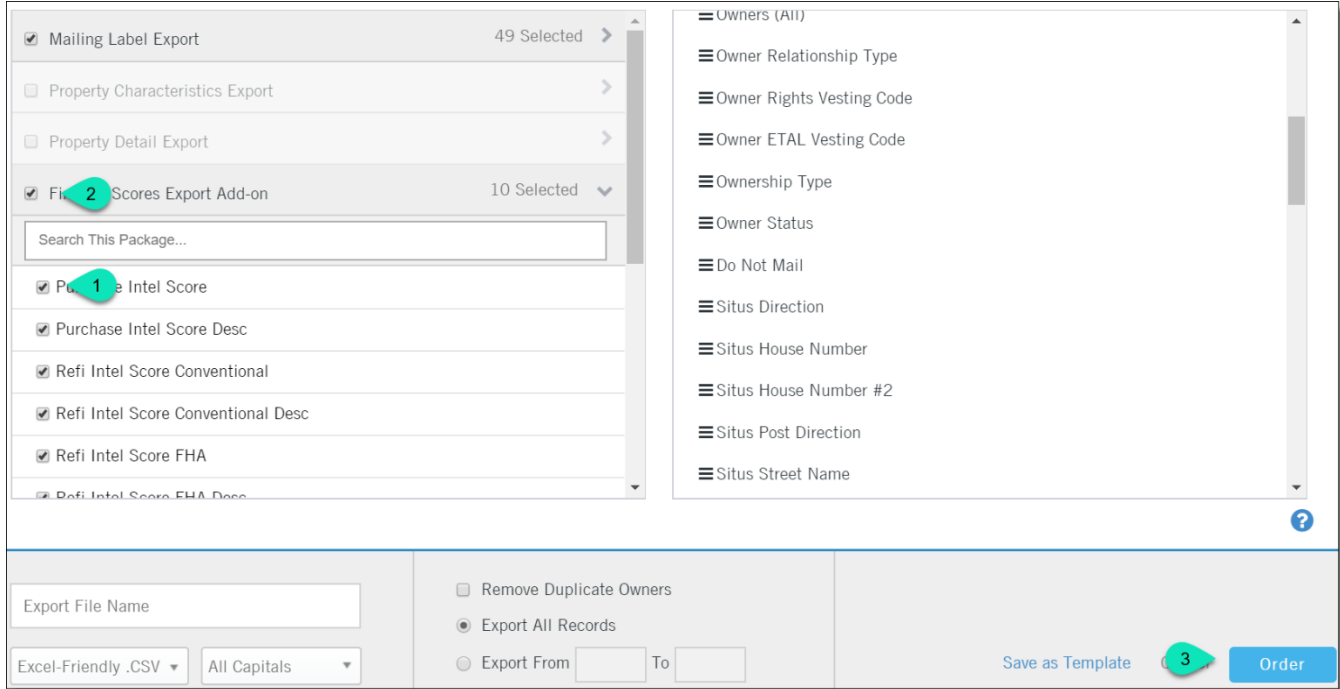
**HOA Contact (secondary):**

**HOA Lien (secondary):**

**Open Lien (secondary):**

**PACE Lien (secondary):**

Click on any down arrow to view the available fields. You may select fields individually (1) or click the checkbox for each category (2) to include all the fields in the export. Once you've selected the appropriate fields, click Order (3) to export your list.



**Note:** Chrome, Firefox and Internet Explorer all download files slightly differently. Please make sure to take note of where your browser saves downloaded files. If you are unsure check with your IT team or Helpdesk or call DataTree Client Services at 800-708-8463.