

# DataTree<sup>®</sup> ACADEMY

# SALES COMPARABLE REPORT

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**Overview**

This guide will cover how to modify the sales comparable report to meet your criteria. Additionally, it will cover how to create a sales comparable lists giving you additional control over what is in the final output.

## Using the Sales Comparable Report

The Sales Comparables report will provide you with quick and easy way for retrieving similar sales to your subject parcel. The standard selection criteria are as follows:

Number of Months to Look Back: Six	Distance from Subject: 0.5 Miles
Living Area Difference: +/- 15%	Land Use: Same as Subject

While these might work for 80% of the homes out there, there will be times when these parameters need to be modified to match the subject property more closely. DataTree provides built in flexibility to modify your report parameters to meet any situation.

### Sales Comparables

**2620 San Benito Dr, Walnut Creek, CA 94598-3109**

APN:

Contra Costa County Data as of: 05/16/2019

**Search Criteria**

# Months Back:	6	Distance From Subject:	0.5 mi	<a href="#">Edit Criteria</a>
Living Area Difference:	15.0 +/-	Land Use:	Same As Subject	

**12 Comparable Properties Found** [Export](#)

COMPARABLES												
#	MI	ST	Address	Sold	Sold For	Listed	Listed At	Sq. Ft.	\$ / Sq. Ft.	Bds / Bths	Lot Size	Age
1	0.08		219 Santa Fe Dr, Walnut Creek, CA 94598-3120	04/29/2019	\$1,100,000			1,767	\$623	3 / 2	8,000	61
2	0.15		23 San Marino Ct, Walnut Creek, CA 94598-3114	03/25/2019	\$1,250,000			1,742	\$718	4 / 2	7,500	49
3	0.15		183 Los Cerros Ave, Walnut Creek, CA 94598-3102	03/13/2019	\$1,085,000			1,742	\$623	4 / 2	7,500	60
4	0.15		81 San Pedro Ct, Walnut Creek, CA 94598-3115	03/17/2019	\$1,219,000			1,663	\$733	4 / 2	16,000	60
5	0.16		2641 San Carlos Dr, Walnut Creek, CA 94598-3138	11/09/2018	\$1,050,000			1,663	\$631	4 / 2	9,000	60
6	0.18	L	2609 San Antonio Dr, Walnut Creek, CA 94598-3208			01/01/2019	\$885,000	1,722	\$514	3 / 2	6,800	63
7	0.19		2673 San Carlos Dr, Walnut Creek, CA 94598-3140	12/07/2018	\$1,200,500			1,742	\$689	4 / 2	8,500	44
8	0.33		401 Walnut Ave, Walnut Creek, CA 94598-3376	01/09/2019	\$1,175,000			1,725	\$681	3 / 2	10,185	56
9	0.36		1950 Blackstone Dr, Walnut Creek, CA 94598-4139	11/15/2018	\$1,235,000			2,032	\$608	4 / 2	10,260	57
10	0.41		307 York Ct, Walnut Creek, CA 94598-2344	04/18/2019	\$1,100,000			2,088	\$527	4 / 2	10,080	41
11	0.45		531 Fenway Dr, Walnut Creek, CA 94598-4121	02/26/2019	\$1,060,000			1,723	\$615	3 / 2	13,530	56
12	0.48		1600 Siskiyou Dr, Walnut Creek, CA 94598-2119	11/29/2018	\$845,000			1,944	\$435	3 / 3	3,500	39

L: Listed   R: REO   RS: REO Sale   SS: Short Sale   D: Default   A: Auction

COMPARABLE PROPERTY SUMMARY			
Subject	Low	Average	High

In the example above, the report provides twelve comparables for the subject property. However, this property is also known as a “Mid-Century Modern” and, in this case, is an Eichler home built in 1957.

Given the unique architectural style of Eichler homes, a careful researcher will have to modify the report parameters to ensure that only architecturally similar homes will be returned.





Eichler Home (left)



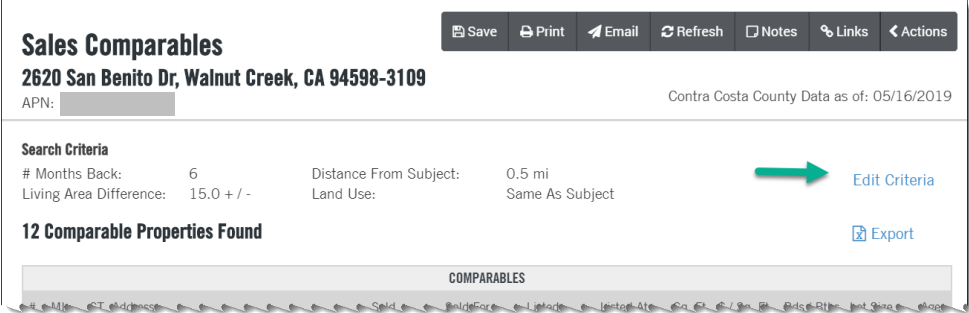
Contemporary Ranch Home (right)

Using the stock parameters you may mixing in the wrong style of homes. Using the above previous example, this is the accompanying map for the sales comparable report:

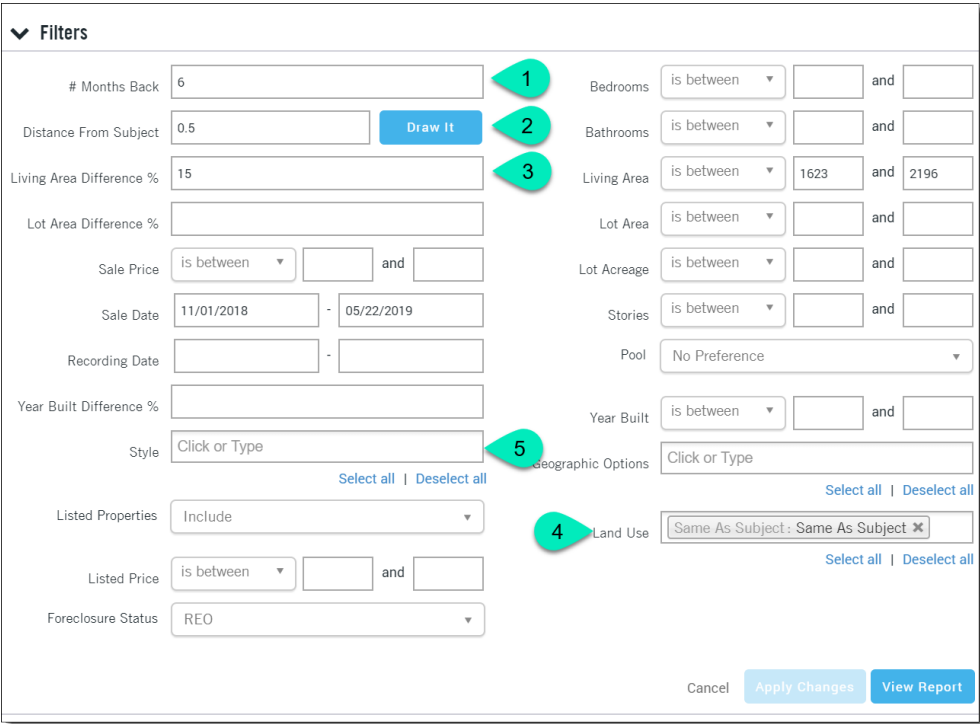
end up



Using the **Edit Criteria** link in the top-right corner of the report, you can adjust the parameters of the report to include bedroom or bathroom counts, square footage, land use, and even the geographic footprint used for the comparables search.



A key for some of the more common fields is below.



1. Look back period can be set by number of months or by a date range
2. The distance in tenths of a mile. By default, this is a radius. If you click “Use Drawing Tools” this will clear the drawn circle and allow you the option of using the Polygon or Freehand drawing tools to inscribe more specific geographic areas. This would be the option to use that could isolate specific architectural styles by inscribing the area that includes only architecturally similar homes. See the Appendix at the end of this document for an example.
3. Living Area can be done in percentages or by a defined square footage.
4. Land use codes can be changed here.

5. Style: This is a drop select menu that contains a number of architectural styles. It is dependent upon County Assessor information which can vary dependent upon the county and may or may not be provided by the county. See the Appendix at the end of the document for a list of included styles.

Additional common physical characteristics can be included, such as Bedrooms, Bathroom, Number of Stories, and Lot Area.

Once your changes are completed, click the Apply Changes button to refilter the report and then click View Report to render the report with the revised filters.

**TIP:** Remember that if you change the geography, you may have to change the number of months back or other filter options to ensure that you still have enough comparables. Your business rules will dictate the filters used for the sales comparables.

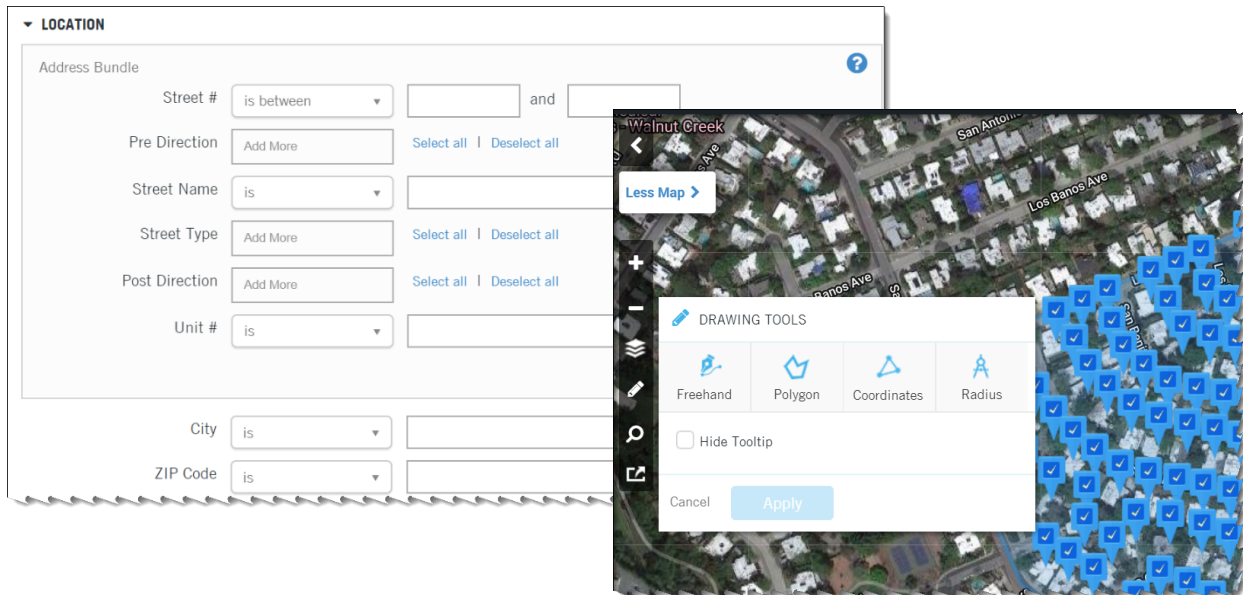
## Using the Map and Filters to Create a Sales Comparable List:

This method employs the interactive map and filters to create your list. This method is often found in Title Companies and Real Estate Agents.

*For more information on Filters, see the Filters How-To Guide.*

### Set Your Geography:

Using either the Location filters or the map, set the geography for your list.



Remember that you can use more than one drawing tool and combine areas. If you wish to describe more than one area, click the drawing tool again, draw the area, and repeat the process. When you have all the areas defined, click **Apply**. Do not click **Apply** until you're finished.

### Set Your Characteristics Filters:

Select the **Characteristics** section and enter any property characteristics that match your subject property.

**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

**TIP:** As a best practice, each time you add a filter option, click the **Get Count** link so you can see how many properties are affected by that filter. This will allow you to tailor your list more carefully. If you add all your filters at once and then click **View Results**, and end up with only a few records, it will not be immediately apparent which filter is causing the possible problem.



### Set Your Sale/Financing/Listing Filters:

This section will allow you to filter by the last sales date of the properties.

**▼ 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](#)

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**▼ LISTING INFORMATION**

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

Listing Date   and

Listing Price   and

## Set Your Owner Filters:

The owner filters include the “Owner Occupied” filter allowing you to specify Absentee vs Owner Occupied homes as well as mailing information and Do Not Mail flags.

**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

**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](#)

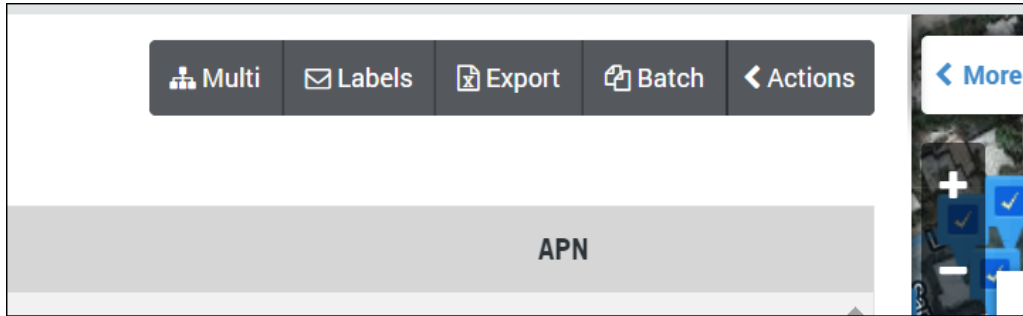
Canadian Mailing City

Canadian Mailing Postal Code

[Add to Search](#)

## Generating Your List:

Once you have your list of comparables, you can create a multi-line report, print labels, or export it into an Excel file (CSV format).



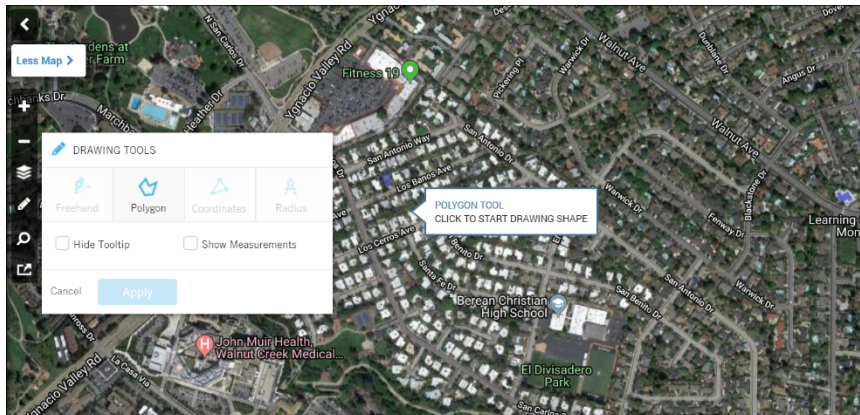
As mentioned earlier, please see the *Filter How-To Guide* for more information on each section of the filters.

## Appendix A:

Clicking Use Drawing Tool will slide the Filter panel to the right and allow you to use the drawing tools to draw a more specific area, as shown below.

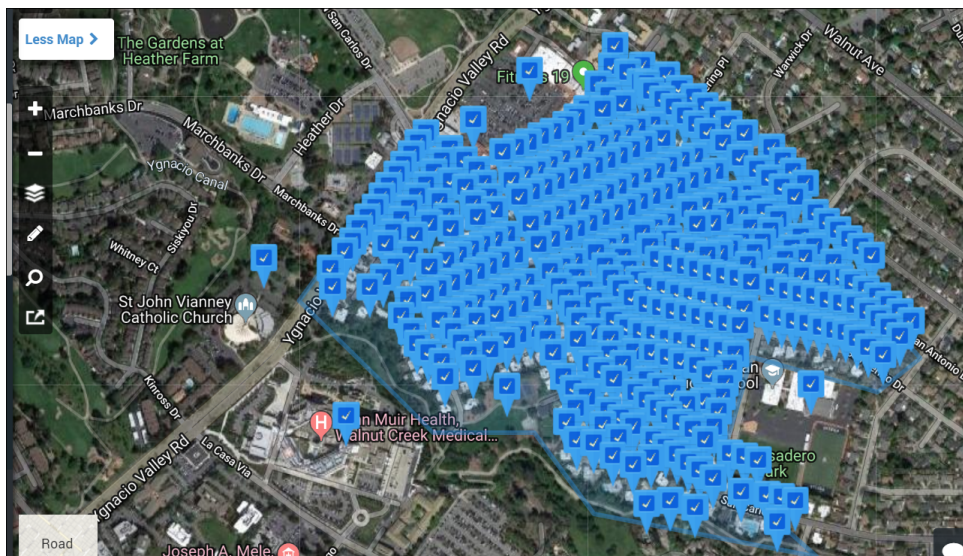
### Figure One:

Starting with the Polygon tool



### Figure Two:

Using the polygon tool to surround only the Eichler development.



Click the Apply button to use this area in your sales comparable report.

## Appendix B:

### County Provided Styles

NONE	L-SHAPE
TYPE UNKNOWN	MANSION
BYPASS	MODULAR/PREFAB
ART DECO	MEDITERRANEAN
A-FRAME	MISSION
AIRLITE	MULTI-FAMILY
ANTIQUE/HISTORIC	MULTI-LEVEL
BI-LEVEL	MOBILE HOME
BUNGALOW	MODERN
CABIN	MID RISE
CAPE COD	NEW ENGLAND
CENTER HALL	OLD
CHALET/ALPINE	OLD ENGLISH
CLUSTER	PATIO-HOME
CONDOMINIUM	QUAD-LEVEL
CONTEMPORARY	QUADRAPLEX
COACH/CARRIAGE HOUSE	RAMBLER
COLONIAL	RANCH
CONVENTIONAL	RECTANGULAR DESIGN
CONVERTED SCHOOL	ROW HOUSE
COTTAGE/BUNGALOW	RAISED RANCH
CUSTOM/DESIGNER/ESTATE	SALT BOX
DOME	SPANISH
DUPLEX	SPLIT FOYER
EUROPEAN	SPLIT LEVEL
FARM HOUSE	SQUARE DESIGN
FEDERALIST	STRAIGHT THROUGH
FRENCH PROVINCIAL	SOUTHWESTERN
GAMBREL/BARN	TRI-LEVEL
GEODESIC	TRIPLEX
GOTHIC	TRADITIONAL
GARAGE APARTMENT	TRINITY
GREEK REVIVAL	TUDOR
GEORGIAN	TOWNHOUSE
GARRISON/FRONTIER	UNDERGROUND/BERM
HIGH RISE	U-SHAPE
H-SHAPE	VICTORIAN
LOG	WILLIAMSBURG
LOW RISE	W-SHAPE