



*First American*

**DataTree**<sup>®</sup>  
By FIRST AMERICAN<sup>®</sup>

# USER GUIDE

Rev. 2015801

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# Welcome

With innovative search tools and advanced technology, DataTree makes searching and acquiring property data, homeowner information, mortgage data and recorded documents intuitive, fast and efficient.

This user guide will help you get the most out of DataTree's powerful features.

## Getting Started



DataTree is designed to get you the information you need quickly, with features that allow advanced filtering, type-ahead logic and a progressive experience that will allow you to create a custom solution for any scenario. This User Guide will provide you with some basic steps for getting started quickly.

Additional eLearning content can be [found here](#).

For more information, you may use the Live Chat feature within DataTree for immediate assistance.

## System Requirements

### Web Browsers

Google Chrome, Mozilla FireFox and Internet Explorer 10 are required. Here is a summary of recommended settings for your browsers. For additional information on setting up your browser, [click here](#).

### Trusted Site:

Typically, it is recommended that you set DataTree as a trusted site in the browser's internet options

### Browser Cache:

Set your browser's cache to be deleted each time you close the browser.

### Pop Up Blocking

The viewing of reports may be blocked by your browser's settings. Be sure to disable popup blockers to gain full access to DataTree's many features. This will be particularly important to labels, exports, printing and saving features.

# Heading out with DataTree.com



## Logging In

Open your web browser and go to <https://web.datatree.com> and press enter. Please input your Username and Password (provided by your company administrator) and click Login.

## Customer Agreement

If this is your first time logging in, you may be prompted to read and accept the First American DataTree License agreement. Please read, enter your initials and hit the “I Accept” button to proceed.

For questions about this agreement, please contact Client Services at 800-708-8463.

## Customer Agreement

Carefully review the following Agreement:

### FIRST AMERICAN DATA TREE LICENSE AGREEMENT

This License Agreement (“Agreement”) accompanies the information, data, images, reports, and/or software (the “Services”) that you are accessing. By accessing the Services, you are agreeing to all the terms and conditions of this agreement, including the product, pricing and billing information in any order confirmation, if applicable (“Order Confirmation”), the terms of which are incorporated into this Agreement by reference. First American Data Tree LLC, a Delaware limited liability company (“Data Tree”) grants you (“Customer”) a limited, non-exclusive, non-transferable license to use the Services, provided you accept the following terms and conditions:

#### 1. Property.

The Services and all intellectual property rights therein are owned by Data Tree. No ownership rights are granted by this Agreement and, except for the limited license provided, Data Tree reserves all rights in and to the Services and all underlying data compilations and information contained therein, including but not limited to the exclusive intellectual property rights and the right to grant further licenses. Customer acknowledges that the Services are the proprietary property of Data Tree and are a valuable commercial product, the development of which involved an expenditure of substantial time and money by Data Tree.

#### 2. Permitted Use.

The Services are solely for use within Customer’s own organization by Customer’s own employees for Customer’s own internal business purposes of verifying property ownership and lien information. Customer shall not resell, relicense or redistribute the Services in whole or in part.

#### 3. Restrictions on Use.

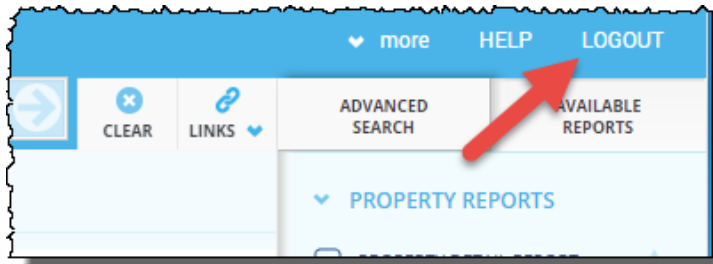
Both during and after the term of this Agreement, Customer agrees as follows:

(a) Customer shall not: (i) disclose, use, disseminate, reproduce or publish any portion of the Services in any manner other than as expressly permitted in this Agreement, (ii) use the Services to create any derivative products, (iii) use the Services to create, enhance or structure any database in any manner, (iv) use the Services to create any derivative products, (v) use the Services to create, enhance or structure any database in any manner, (vi) grant access to the Services, or any portion thereof, to individuals incarcerated in prisons or correctional institutions, (vii) allow access to the Services through any terminal operations, (viii) use the Services outside the United States.

(b) Customer shall (i) comply with the published guidelines of the Direct Marketing Association, other applicable industry guidelines, and all federal, state, and local laws, regulations and orders from competent jurisdictions regarding the use, storage and dissemination of data such as the Services, (ii) abide by all prevailing federal, state, and local laws, regulations and orders from competent jurisdictions, including but not limited to those governing fair information practices and consumers’ rights to privacy, and any applicable non-solicitation laws, (iii) limit access to consumer information to those individuals who have a “need to know” in connection with Customer’s business and will obligate those individuals to acknowledge and agree to the terms of this Agreement.

## Logging Out

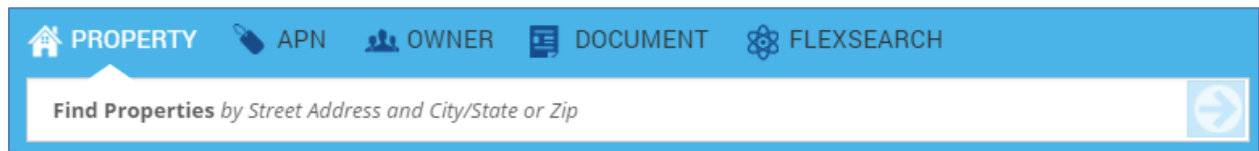
When you are finished using DataTree.Com, please click on the Logout link at the top right hand corner.



## Choose Your Search Preference

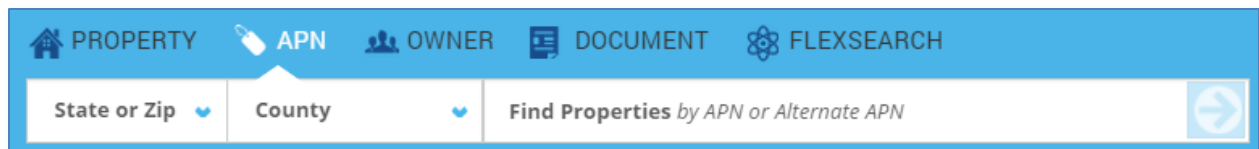
### Property Search

Enter any address when choosing the Property search bar. A street number, street name, city, state and zip can be used without commas. The type-ahead feature can pre-fill matched results. Select the suggested property address and click on the encircled arrow to view the result. *By default, DataTree searches nationwide so there's no need to select a state and county!*



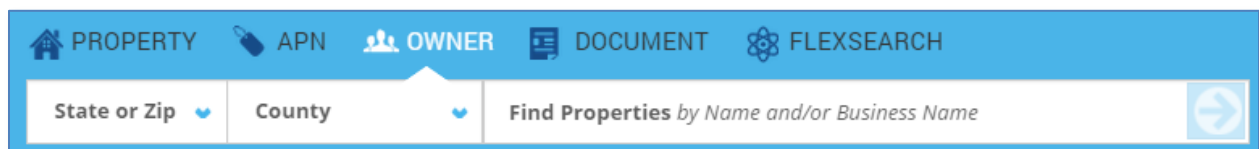
### APN Search

The State or Zip and County must be provided while inputting an Assessor's Parcel Number (APN). The APN can be entered with or without dashes. Click on the encircled arrow to view the result.



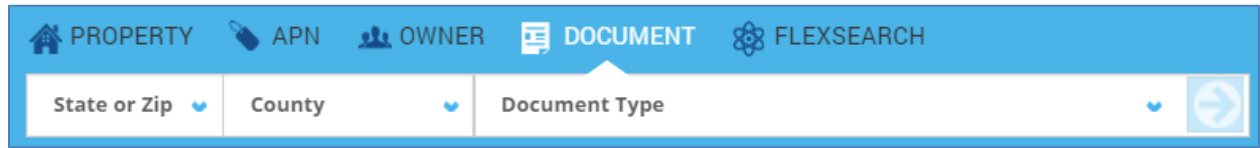
### Owner Search

Users can query a property by either Owner's Name or Business Name. The State or Zip and County must be provided in this search. A pop-up of the Search Result and Subject Property will be displayed along with options for Property Reports.



## Document Search

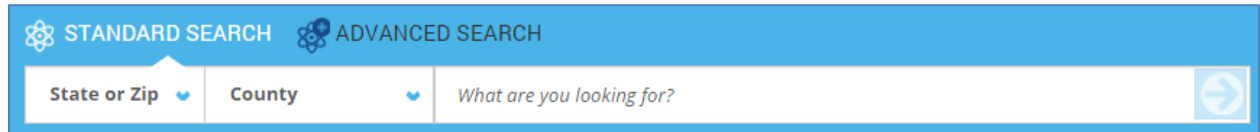
Users can query for a specific document by inputting the State, County and Document Type in the search bar. The appropriate Document Type format will then appear, allowing the user to request a recorded Instrument document.



The screenshot shows a navigation bar with five options: PROPERTY (with a house icon), APN (with a magnifying glass icon), OWNER (with a group of people icon), DOCUMENT (with a document icon), and FLEXSEARCH (with a gear icon). Below this bar is a search input area with three dropdown menus labeled 'State or Zip', 'County', and 'Document Type', followed by a search button with a right-pointing arrow.

## FlexSearch

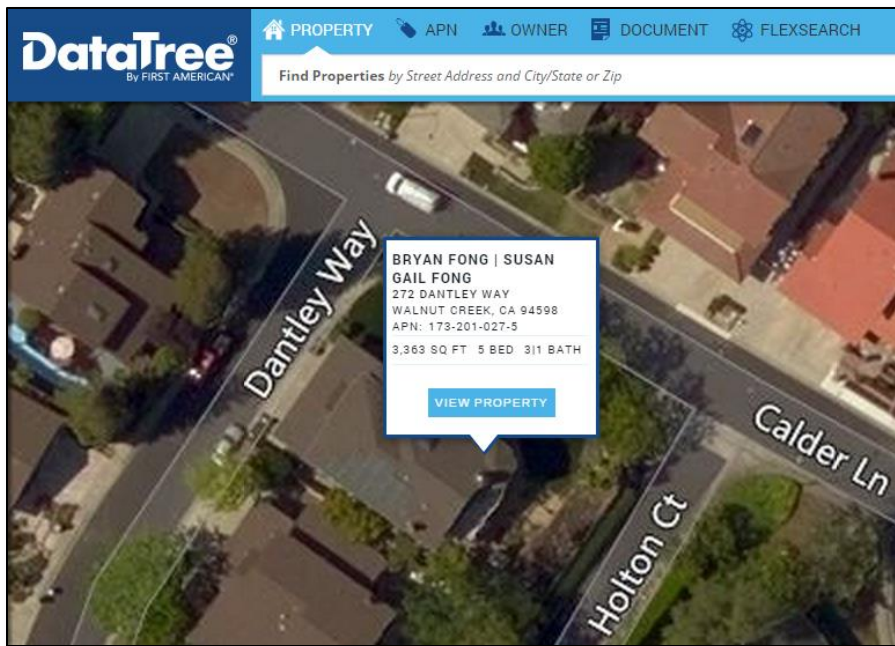
This is a unique search technology that connects users to information found in billions of recorded land documents, leveraging an open contextual feature that is not limited by address, county, State, zip code, owner names or APN search fields. Simply enter a search word or phrase and FlexSearch will instantly access billions of recorded document images, going back to the year 2000. FlexSearch allows quick document searches with filters that include: full document text, county name, State name, Document Type and Document Year.



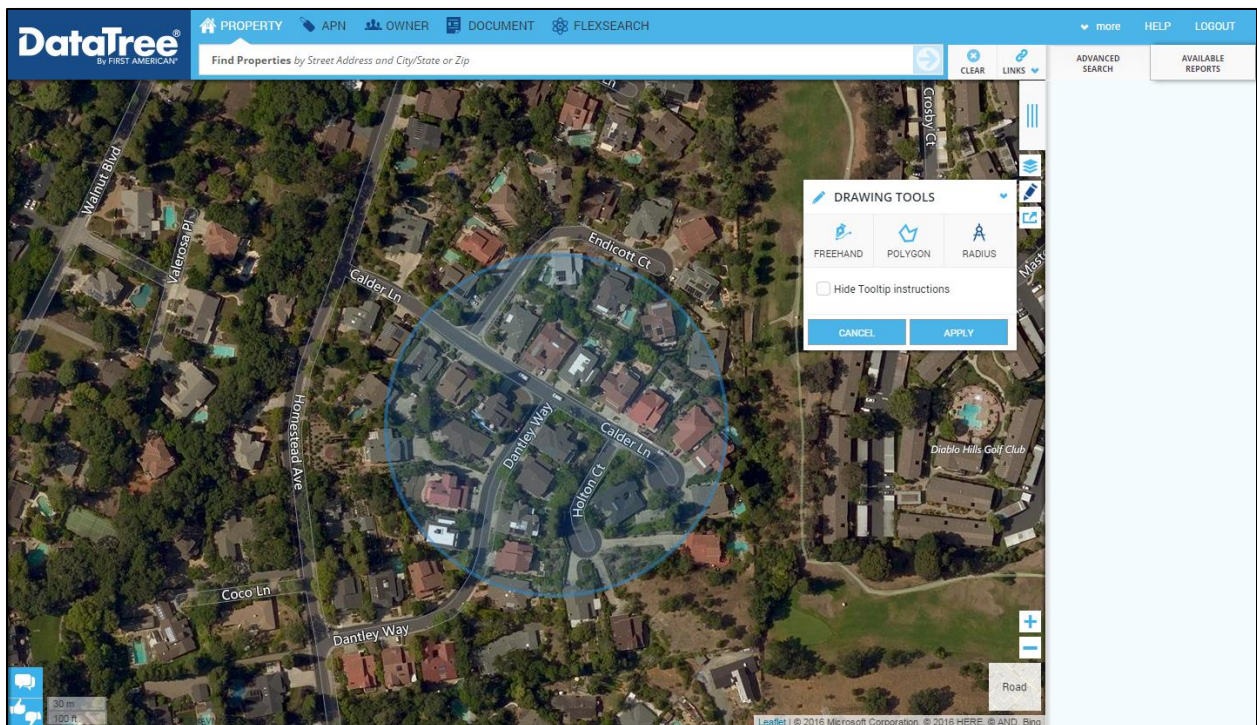
The screenshot shows a navigation bar with two options: STANDARD SEARCH (with a gear icon) and ADVANCED SEARCH (with a gear icon). Below this bar is a search input area with two dropdown menus labeled 'State or Zip' and 'County', followed by a text input field with the placeholder text 'What are you looking for?' and a search button with a right-pointing arrow.

## Interactive Map Search

Users can identify, select and de-select properties directly on the map simply by double-clicking on the property or by clicking View Property in the property information pop-out.



Multiple properties can be selected at once by using the Drawing Tools to define an area on the map. Any property that is touched by or falls within the area defined by your drawing tool will be selected. Labels or reports can be generated for this list.

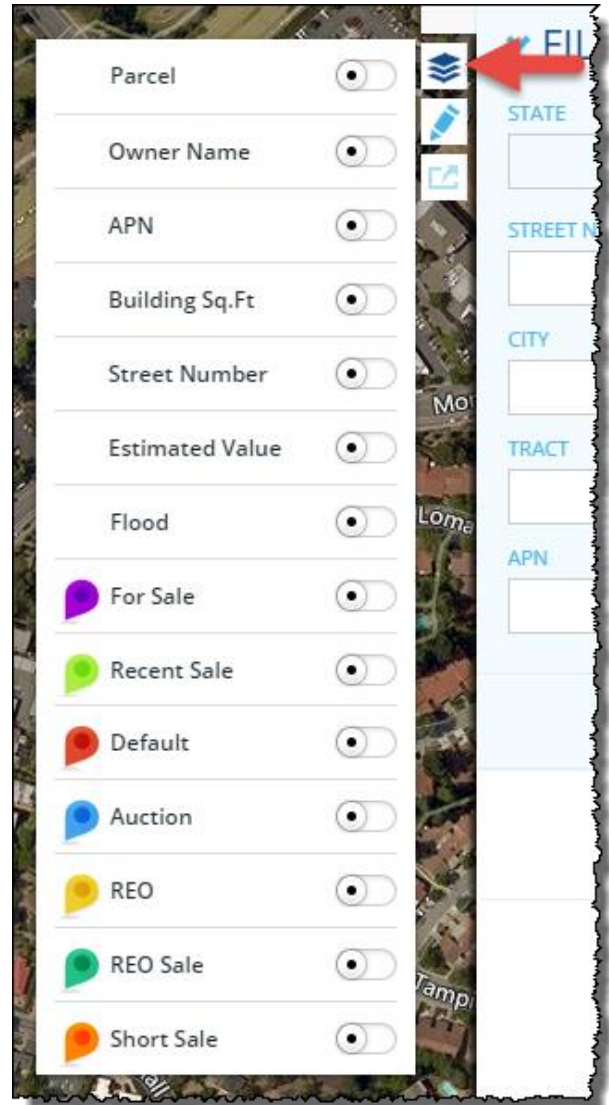




The map view can also be toggled between roads or satellite views.

The map also includes flags and layers to provide additional information, such as distressed status, parcel boundaries, APNs and much, much more. Click on the toggle switch to the right of each option to activate that feature on the map.

For more information on using the map tools, [click here](#).

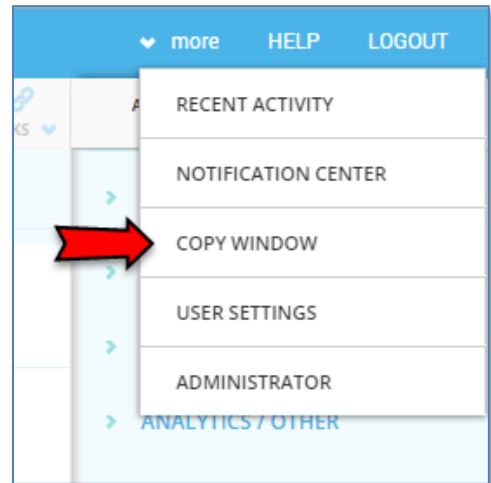




# Search and Report Features

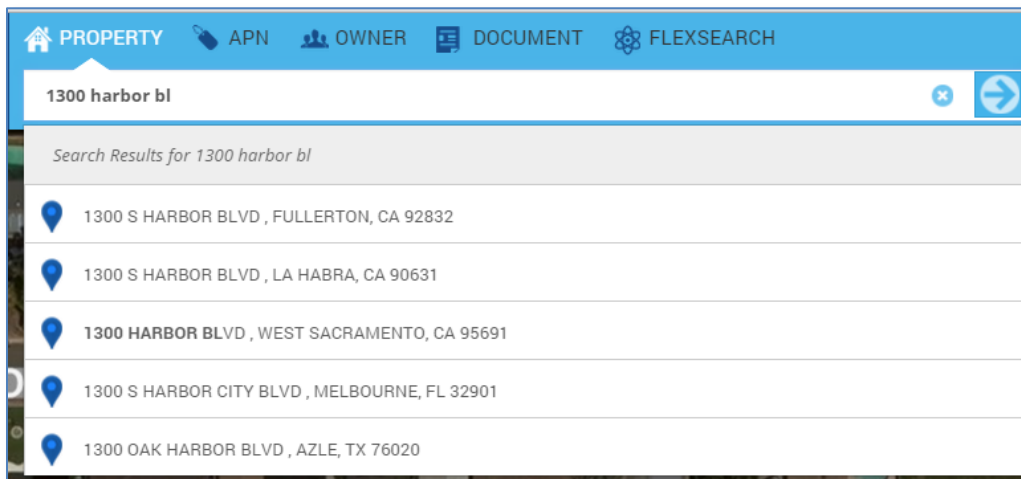
## Copy Window

This allows users to conduct an unlimited number of property searches in parallel without having to complete or exit searches that have been previously started by opening additional tabs in your browser and allowing you to run multiple simultaneous independent searches.



## Type-Ahead

This feature will attempt to suggest the property, APN or owner name as you enter information into the search bar. *Remember that DataTree searches nationwide, by default.*



## Verified Records

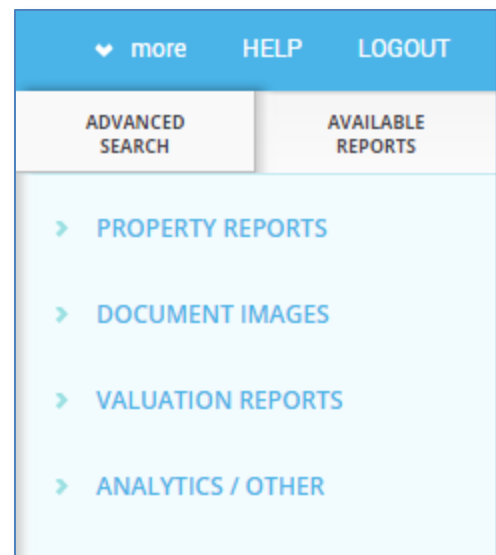
In the reports, you may see a Verified Records icon. This indicates that a transaction was digitally checked across multiple independent resources and, when a match is found from at least two independent sources, it is marked with a “Verified” icon. This will save customers time and money by minimizing their own independent verification processes.



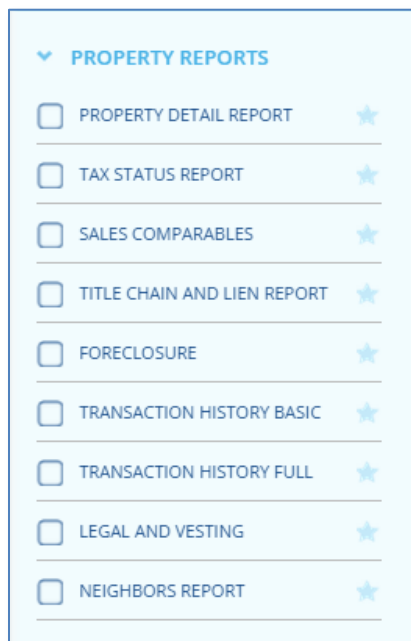
# Available Reports

The following Property Reports are typically available for a user. If you do not see a report listed below, please contact your company administrator. Reports and documents are found at the right hand side of the application and can be ordered after a property has been selected. The reports are grouped into categories – Property, Document Images, and Valuation Reports – and the section can be opened by clicking on the group header.

For additional information on the various reports and how to use them, [click here](#).



## PROPERTY REPORTS



### Property Detail Report

This report provides comprehensive information on the subject property with location information (legal description), last market sale, prior sale, property characteristics, site and basic tax information. Documents can be accessed through the report.

### Tax Status Report

This report provides payment status of a parcel's current-year real estate tax obligations and prior year delinquencies. It will also include status, frequency, type, due dates, Assessor's Parcel Number (APN), Situs and mailing addresses.

### Sales Comparables

This report provides a quick view into current market conditions that include sale prices, property characteristics and land use, comparing up to 50 similar properties.

### Title Chain and Lien Report

Choose this report when you need property details including open deeds of trust & mortgages, involuntary liens, assessment and tax info such as current year, status and delinquencies. Documents can be accessed through the report.

### Foreclosure

Choose this report to discover the information on properties in all stages of foreclosure and those subject to pending legal action.

### Transaction History Basic

Select this report for comprehensive transaction history details including all ownership transfers such as quit claims and market sales, plus any mortgages. Documents can be accessed through the report.

### Transaction History Full

This expands the Basic version providing details on ownership transfers such as quitclaims, market sales, mortgages, releases, assignments and foreclosure information. Document access will be available within this report.

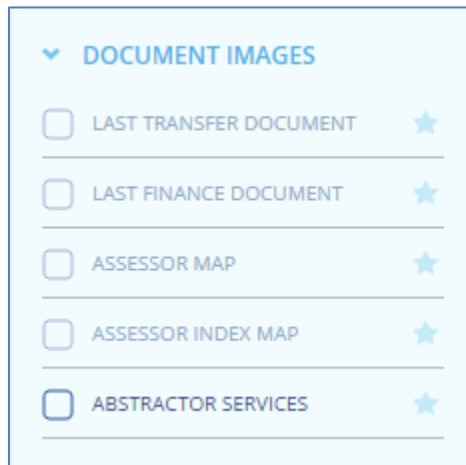
### True Legal and Vesting

Use the legal and vesting report when you are looking for insight on an legal description, APN, current owner vesting and supporting tax information. A document image from which the legal description was extracted is included with this report.

### Neighbors Report

Choose this report when you need to identify the neighbors of a property, including addresses, owner names, property characteristics, land use and last sale information.

## DOCUMENT IMAGES



#### Last Transfer Document

Access the document image for the last transfer recorded.

#### Last Finance Document

Access the document image for the last finance recorded.

#### Assessor Map

View the assessor parcel maps that reflect the legal boundaries and dimensions of each parcel and serve as the basis for land value assessments.

#### Assessor Index Map

View the assessor index map to see a high-level view of an area consisting of multiple contiguous assessor parcel maps.

### Abstractor Services

The Abstractor Service function is always available, regardless of whether a property is selected, and allows you to order documents through the service at any time. Completed orders will be found in the Recent Activities option in the More menu.

## VALUATION REPORTS

▼ VALUATION REPORTS	
<input type="checkbox"/> VALUEPOINT4	★
<input type="checkbox"/> PASS	★
<input type="checkbox"/> VALUESURE	★
<input type="checkbox"/> HOME VALUE EXPLORER(HVE)	★
<input type="checkbox"/> VEROVALUE	★
<input type="checkbox"/> I-VAL	★
<input type="checkbox"/> CA VALUE	★
<input type="checkbox"/> SITEXVALUE	★
<input type="checkbox"/> HOME PRICE ANALYZER	★
<input type="checkbox"/> AVM CASCADE	★
<input type="checkbox"/> POWERBASE6	★
<input type="checkbox"/> CLEARVALUE AVM CASCADE	★

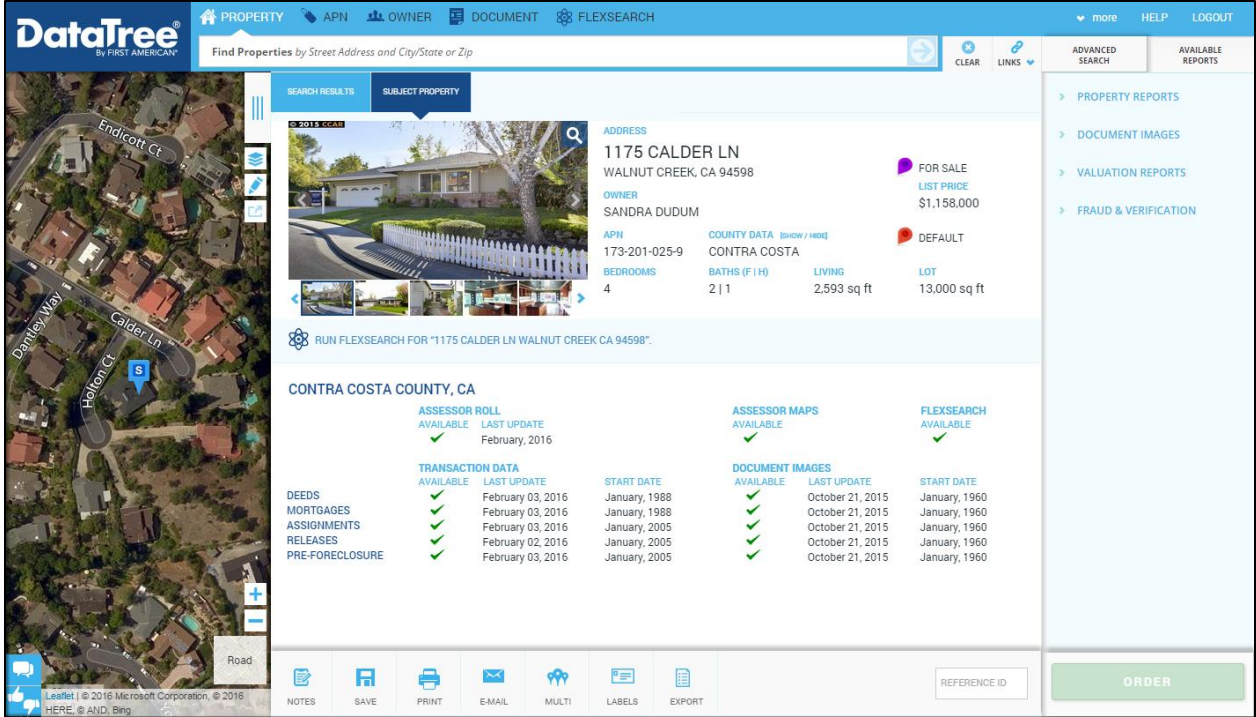
### Automated Valuation Models (AVMs)

Use an AVM when you need to estimate the market value of a property. These reports typically include an estimated value, estimated valuation range, date of valuation, a confidence score, last market sale information and prior market sale information along with a list of recent market sales.

*Please reference your business requirements when using AVMs as your company may specify which AVM is to be used.*

# Managing Reports and Documents

Once a property is selected using Property, APN, or Owner search, DataTree will load the Subject Property Tab containing a summary of the property. A property must be selected before a report can be ordered.

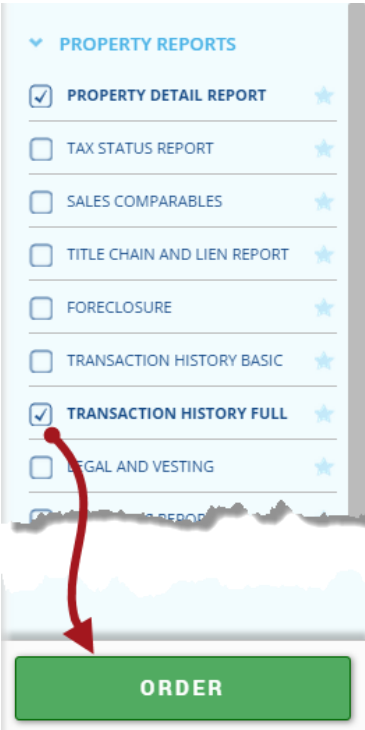


For more information on using the Search Features, [click here](#).

## Ordering Reports and Documents

After locating a property, select the desired report by clicking the checkbox and clicking Order at the bottom right hand corner of the application.

For additional information on standard searches and ordering reports, click [here](#). Report-specific information can also be found [here](#).



Reports will load to the right of the subject property tab. Click on the Report Tab to view that particular report.

SEARCH RESULTS SUBJECT PROPERTY TOTAL VIEW PROPERTY DETAIL FORECLOSURE

ADDRESS  
1175 CALDER LN  
WALNUT CREEK, CA 94598

OWNER  
SANDRA DUDUM

APN  
173-201-025-9

**Property Detail Report**

1175 Calder Ln, Walnut Creek, CA 94598  
APN: 173-201-025-9

**Owner Information**

Owner Name: Dudum Sandra  
Address: Separate Estate/Property

## Notes, Saving, Printing and Emailing Reports; Exporting Reports

The Subject Property and selected reports and documents can be noted, saved, printed, or emailed using the toolbar just above the Subject Property. For more information on these features, [click here](#).

If you have selected a list of properties using the drawing tools or advanced filters (see below), you can generate a Multi-line report, print Mailing Labels, or simply Export the list into Excel. Best practices on using exports can be found [here](#).

NOTES SAVE PRINT E-MAIL MULTI LABELS EXPORT

## Links

You can also search Zillow, Trulia, and Realtor.com to see if the property you selected is currently listed for sale. Selecting one of these links will launch the real estate site and search for the subject property. The site will load in a separate browser tab so you do not lose your work in DataTree.

CLEAR LINKS

WWW.ZILLOW.COM

WWW.TRULIA.COM

WWW.REALTOR.COM

## Reference ID Field

The Reference ID is a free-text field allowing the user to enter an identifier so you can find the ordered reports for this subject property on the monthly DataTree invoice. This will allow you to identify reports on the monthly DataTree invoice so you can bill out work to a specific client, if required.

NOTES SAVE PRINT E-MAIL MULTI LABELS EXPORT REFERENCE ID

# Filters

Use the Filters to create highly customized lists of properties for direct mail applications or research purposes.

Before using the Filters, keep in mind two primary search criteria:

- **WHERE** are you searching?
- **WHAT** are you searching for?

Keeping these two questions in mind will allow you to navigate through the Filter tabs with relative ease.

## Location

The Location tab describes **WHERE** you want to search for properties. It includes filters for states, counties, cities, Zip codes, tracts and much more. You can also set up a proximity search to locate properties near a specific address.

The screenshot shows the 'FILTERS' interface with the 'LOCATION' tab selected. The interface is organized into several sections:

- STATE** and **COUNTY**: Each has a dropdown menu with a plus sign to the right.
- STREET NUMBER**, **PRE DIR**, **STREET NAME**, **STREET TYPE**, **POST DIR**, and **UNIT NUMBER**: Each has an input field with a plus sign to the right.
- CITY** and **ZIP CODE**: Each has an input field with a plus sign to the right.
- SUBDIVISION**, **TRACT**, and **TAX AREA**: Each has an input field with a plus sign to the right.
- APN**, **BOOK**, and **PAGE**: Each has an input field with a plus sign to the right.
- PROXIMITY SEARCH**: A section with three input fields: **NUMBER OF PROPERTIES**, **REFERENCE ADDRESS**, and **MAX DISTANCE**.

The following tabs describe **WHAT** you are looking for.

## Characteristics

The Characteristics tab allow you to identify specific property characteristics, such as the land use, square footage, number of bedrooms, bathrooms, or total rooms, year build, presence of a pool and more.

▼ FILTERS	LOCATION	CHARACTERISTICS	TRANSACTION	DISTRESSED	OWNER
LAND USE <input type="text"/>	BUILDING AREA (SQFT) <input type="text"/> - <input type="text"/>	LOT AREA (SQFT) <input type="text"/> - <input type="text"/>			
TOTAL NUMBER OF BEDROOMS <input type="text"/> - <input type="text"/>	TOTAL NUMBER OF BATHROOMS <input type="text"/> - <input type="text"/>	TOTAL NUMBER OF ROOMS <input type="text"/> - <input type="text"/>			
NUMBER UNITS <input type="text"/> - <input type="text"/>	LOT ACREAGE <input type="text"/> - <input type="text"/>	YEAR BUILT <input type="text"/> - <input type="text"/>			
POOL OPTION <input type="text"/>	ZONING CODE <input type="text"/> - <input type="text"/>	COUNTY LAND USE <input type="text"/>			
ESTIMATED CURRENT VALUE <input type="text"/> - <input type="text"/>	ASSESSED VALUE <input type="text"/> - <input type="text"/>	NEW CONSTRUCTION <input type="text"/>			



## Transaction

The Transaction tab includes filters for Sales, Mortgage and Listing information.

▼ FILTERS [SHOW / HIDE]    LOCATION    CHARACTERISTICS    **TRANSACTION**    DISTRESSED    OWNER

**SALES INFORMATION**

SALE PRICE    SALE PRICE TYPE    SELLER NAME

LAST SALE DATE    LAST SALE RECORDING DATE    RECORDING MONTH

**MORTGAGE INFORMATION**

MOST RECENT MORTGAGE AMOUNT    FIRST MTG TYPE    INT RATE TYPE    INTEREST RATE

MOST RECENT MTG RECORDING DATE

MOST RECENT LENDER NAME

**+ ADD LENDERS**    *(This filter references a lender of record)*

**LISTING INFORMATION**

ORIGINAL LIST DATE    FOR SALE LISTED PRICE

## Distressed

Investors, looking for distressed properties, will find this tab useful as it will filter for properties in different stages of the foreclosure process.

The screenshot shows the 'Distressed' filter tab selected. The interface includes a 'FILTERS' dropdown menu and navigation tabs for 'LOCATION', 'CHARACTERISTICS', 'TRANSACTION', 'DISTRESSED', and 'OWNER'. The 'DISTRESSED' tab is active. The filter fields include: 'FORECLOSURE STATUS' (a dropdown menu), '# OF MONTHS BACK' (a range selector with two input boxes and a minus sign), and 'AMOUNT' (a range selector with two input boxes and a minus sign).

## Owner

Finally, the Owner tab allows filtering by name, mailing address, Do Not Mail flag, occupancy and more.

The screenshot shows the 'Owner' filter tab selected. The interface includes a 'FILTERS' dropdown menu and navigation tabs for 'LOCATION', 'CHARACTERISTICS', 'TRANSACTION', 'DISTRESSED', and 'OWNER'. The 'OWNER' tab is active. The filter fields include: 'OWNER LAST NAME', 'OWNER FIRST NAME', and 'OWNER (OTHER)' (each with a text input and a plus sign); 'OWNER ETHNICITY', 'OWNER OCCUPIED', and 'EXEMPTION' (each with a dropdown menu); 'MAILING STATE' and 'MAILING COUNTY' (each with a dropdown menu and a plus sign); 'MAILING STREET NUMBER', 'PRE DIR', 'MAILING STREET NAME', 'STREET TYPE', 'POST DIR', and 'UNIT NUMBER' (each with a text input and a dropdown menu); 'MAILING CITY' (with a text input and a plus sign) and 'MAILING ZIP' (with two text inputs, a minus sign, and a plus sign); and 'DO NOT MAIL' (with a dropdown menu).

For more information using the Filters, click [here](#). To review additional best practices on using the Filters, click [here](#).

# Support

Should you need immediate support, use the DataTree Live Chat feature.



The Feedback button will allow you to provide DataTree with immediate instant feedback on how the platform is functioning for you.



Click the Help menu at the top right to access the DataTree Support site. This site includes eLearning Modules, the Webinar schedule, FAQs and Guides.

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## WELCOME


This support page has all the information you need to get acquainted with the all new DataTree. If you need more information, our client services team is ready to support you.



### DataTree Academy

Visit the DataTree Academy to view video tutorials on how to use the new DataTree.


[Learn More](#)



### Live Webinars

Visit this page to register for an upcoming webinar or to schedule training.


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### Quick Reference Guide

View our Quick Reference Guide to learn about the differences between classic and the new DataTree.


[Learn More](#)



### FAQs

Take a look at our Frequently Asked Questions to get the answers you need right away.


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### Geo-Coverage

View our interactive state map to view a list of counties where documents are currently available.

[Learn More](#)



### Guide For Administrators


Visit this page to get additional information on newest Release Notes of the all new DataTree.

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### ON-DEMAND VIDEO TUTORIALS

Have a question about the all new DataTree? Check out our DataTree Academy Training Videos for the answers to your questions! With these short, yet informational courses you will get step by step training on any topic you may need help on. Get concise and accurate answers with DataTree Academy Training Videos. [Click here](#) to view videos.

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