USER GUIDE

Rev. 2015801

800.708.8463 | DataTree.com/support

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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 browers. 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.

Logging Out

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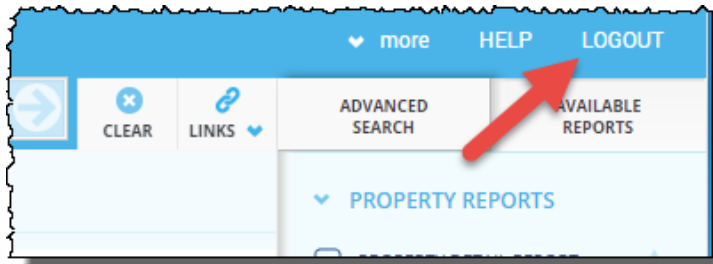

Choose Your Search Preference

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!*
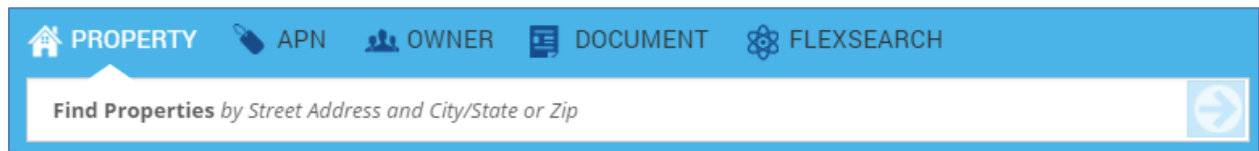
APN Search

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.
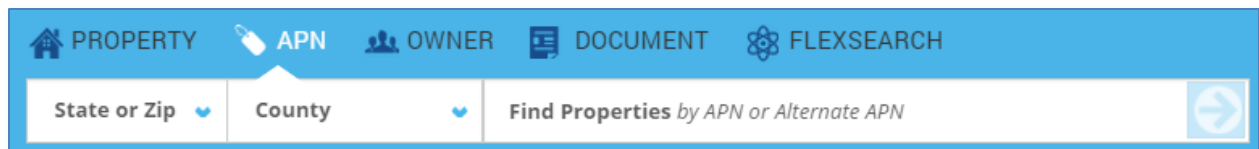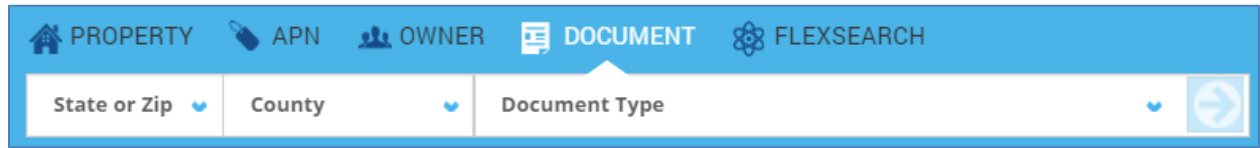

Owner Search

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.
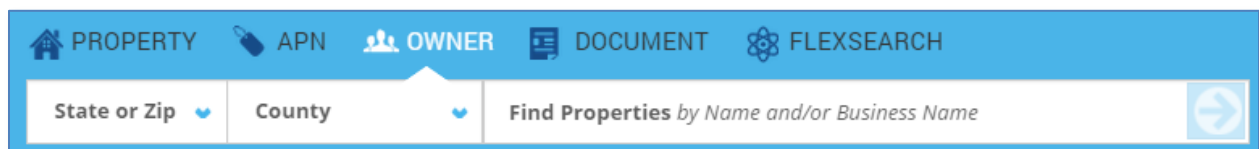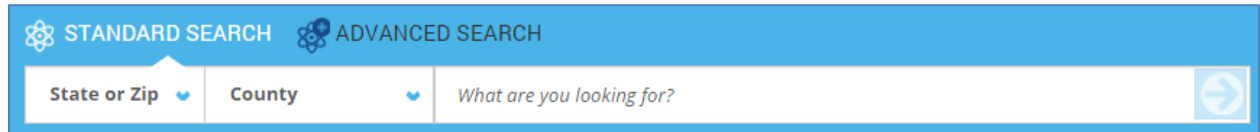
Document Search

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.

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.

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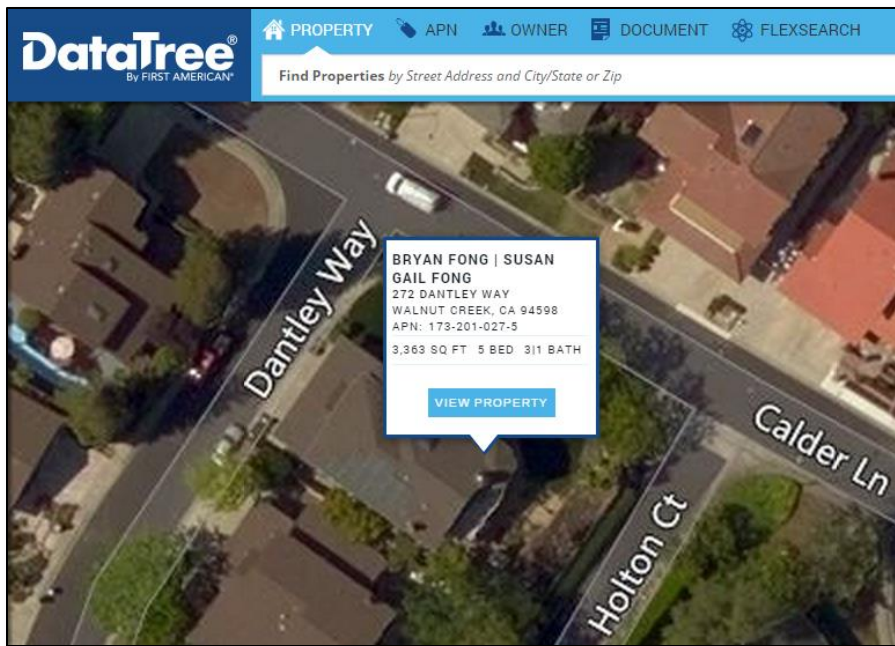
Multiple properties can be selected at once by using the Drawing Tools to define an area on the map. Any property that is touched by or falls within the area defined by your drawing tool will be selected. Labels or reports can be generated for this list.
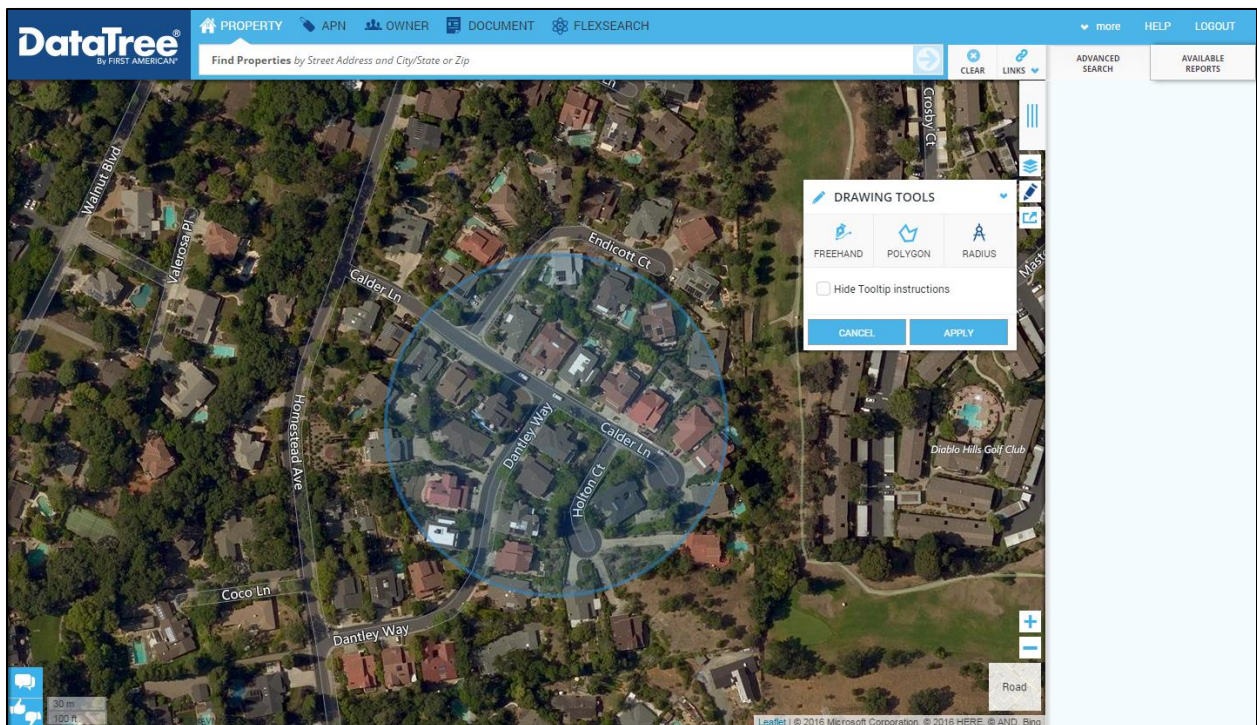
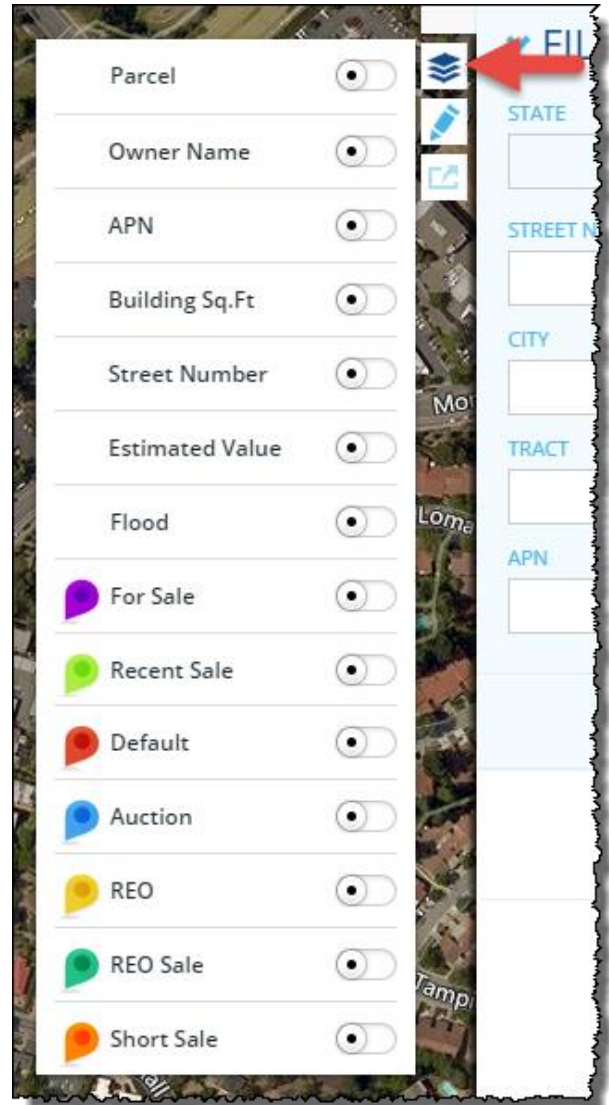The map view can also be toggled between roads or satellite views.

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.
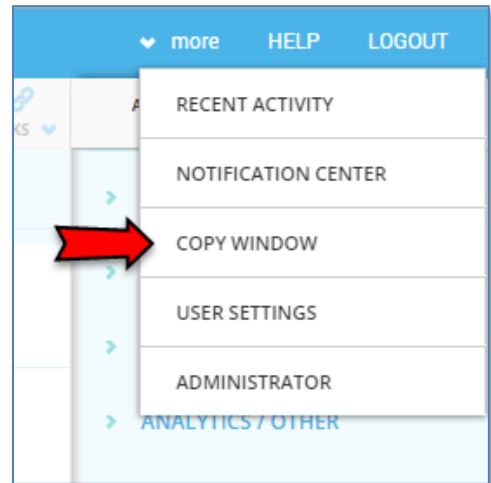
Type-Ahead

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.*
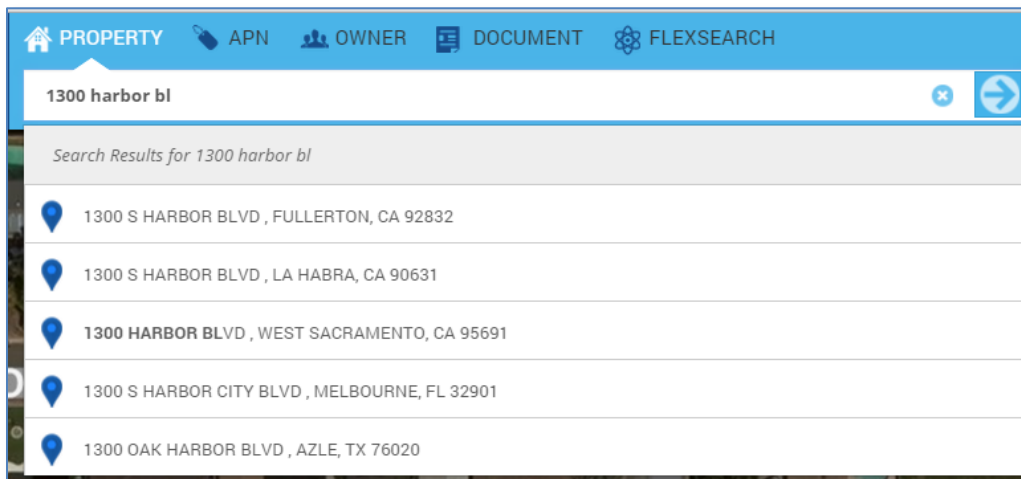

Verified Records

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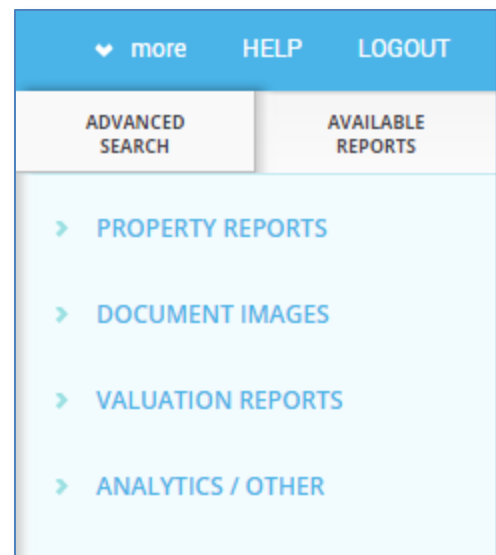
PROPERTY REPORTS
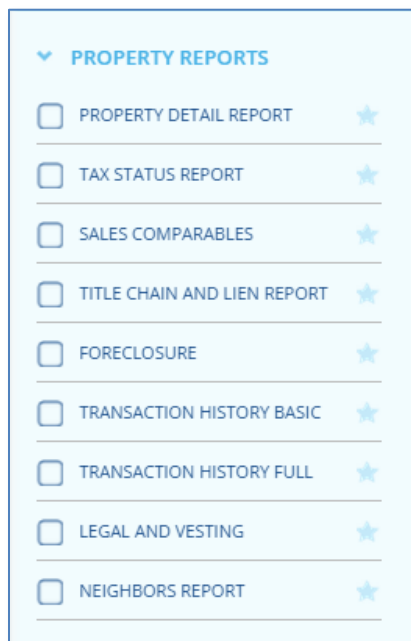
Property Detail Report
This report provides comprehensive information on the subject property with location information (legal description), last market sale, prior sale, property characteristics, site and basic tax information. Documents can be accessed through the report.

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 repor.

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
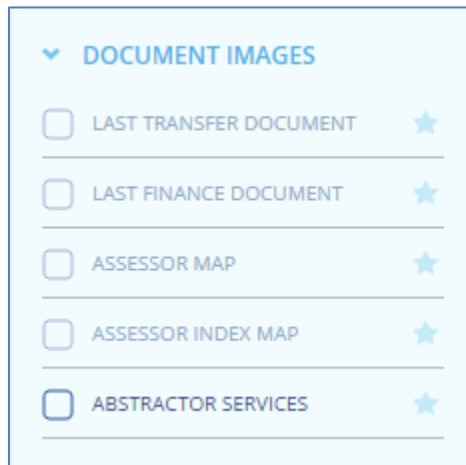
Last Transfer Document

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

- ☐ VALUEPOINT4 ★
- ☐ PASS ★
- ☐ VALUESURE ★
- ☐ HOME VALUE EXPLORER(HVE) ★
- ☐ VEROVALUE ★
- ☐ I-VAL ★
- ☐ CA VALUE ★
- ☐ SITEXVALUE ★
- ☐ HOME PRICE ANALYZER ★
- ☐ AVM CASCADE ★
- ☐ POWERBASE6 ★
- ☐ 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.
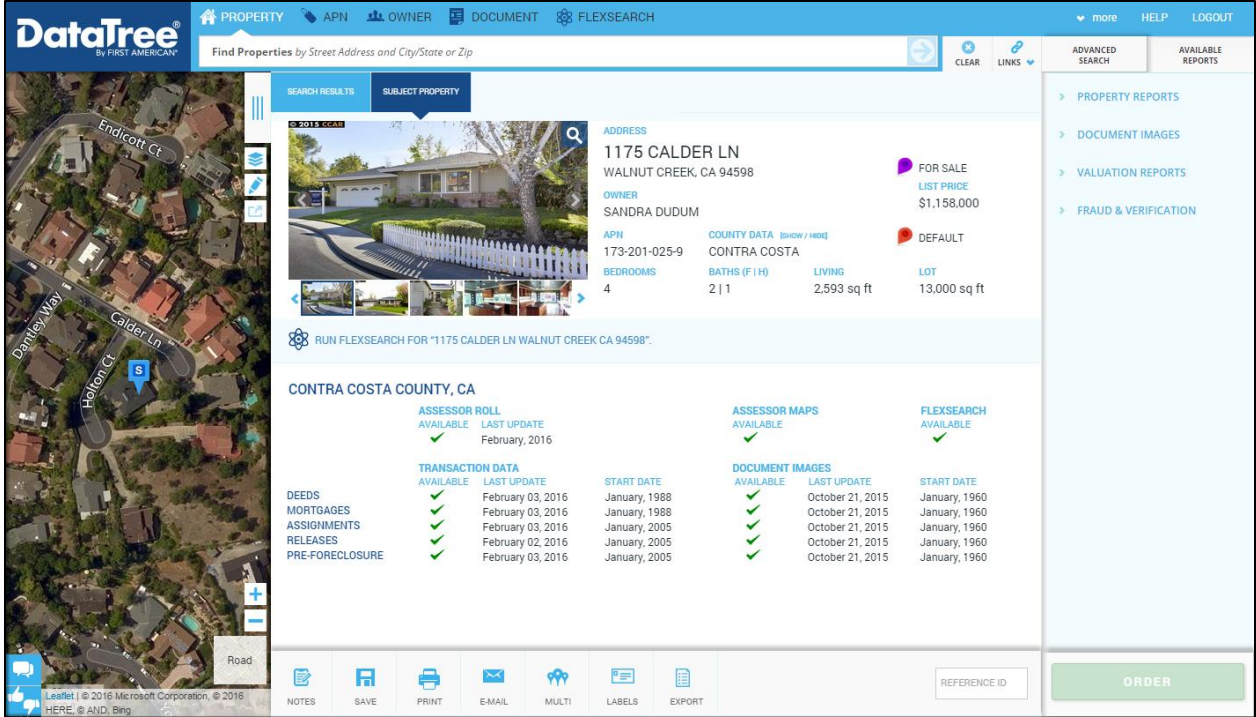
For more information on using the Search Features, click here.

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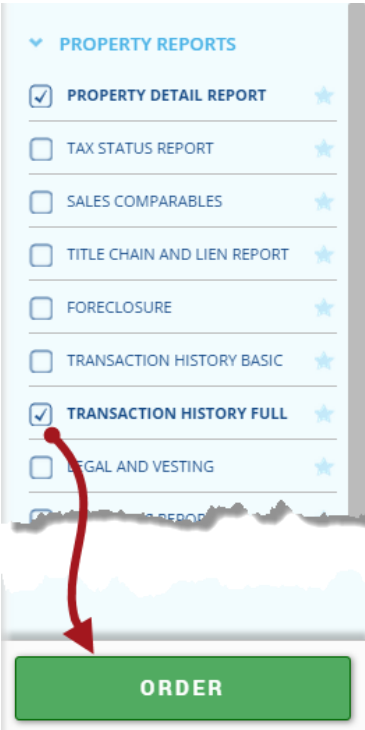
Reports will load to the right of the subject property tab. Click on the Report Tab to view that particular report.

Notes, Saving, Printing and Emailing Reports; Exporting Reports

The Subject Property and selected reports and documents can be notated, 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.

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.

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.

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 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.

Transaction

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

Distressed

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

Owner

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

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.