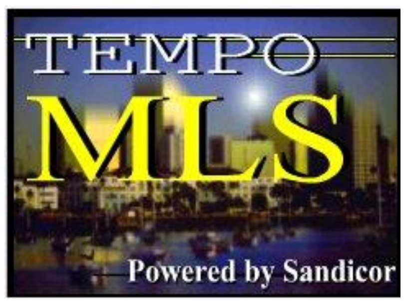
Sandicor

TEMPO™
TAX – REALIST.COM
(VERSION5)



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Tax – Realist.com

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Published by Sandicor, Inc.
5414 Oberlin Drive,
Ste. 150
San Diego, CA 92121
858.622.6200
helpdesk@sandicor.com
www.sandicor.com

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EXPLORING TAX FEATURES

TERMS

Printer Ready	Tempo access is through the Internet. Tempo's web pages contain information you most likely do not wish to print, especially when providing the information to your clients. Tempo creates a "printer ready" version of the report or map that they format to fit a printed page and that contains report or map information only.
Realist.com	Realist.com is a product within the Tempo MLS system that allows you to access a tax database. You can use this database to extract information and create reports.
Tax Database	A database containing property records which includes owner, tax, mortgage, and other information.

ACCESSING THE TAX DATABASE

You must have a current Sandicor member log on account to access the Realist.com tax database. You access the Tax functions from the **Tempo MLS Home Page.**

Figure 1: Tempo MLS Home Page

1. From the **Function Menu** or **Navigation Bar**, click **Tax**. The **Realist.com link** appears.

Figure 2: Realist.com Link Page

2. Click the **Realist.com** link. If this is the first time you have logged into the Realist.com tax database, the License Agreement page appears. Read the agreement and select either **I Agree**, to accept the terms of the license agreement or **I Decline** if you do not agree with the terms. Sandicor allows you access to the database only if you agree to the terms indicated. Click **Submit** to submit your decision. (Note: the figure below does not contain the entire agreement.) If you do not agree to the terms of the agreement and click **Submit**, a separate Realist.com Welcome page and logon appears. We do not provide further instructions if you disagree with the terms.

3. The **Quick Search Center** (also known as the **Tax Home** Page) appears.

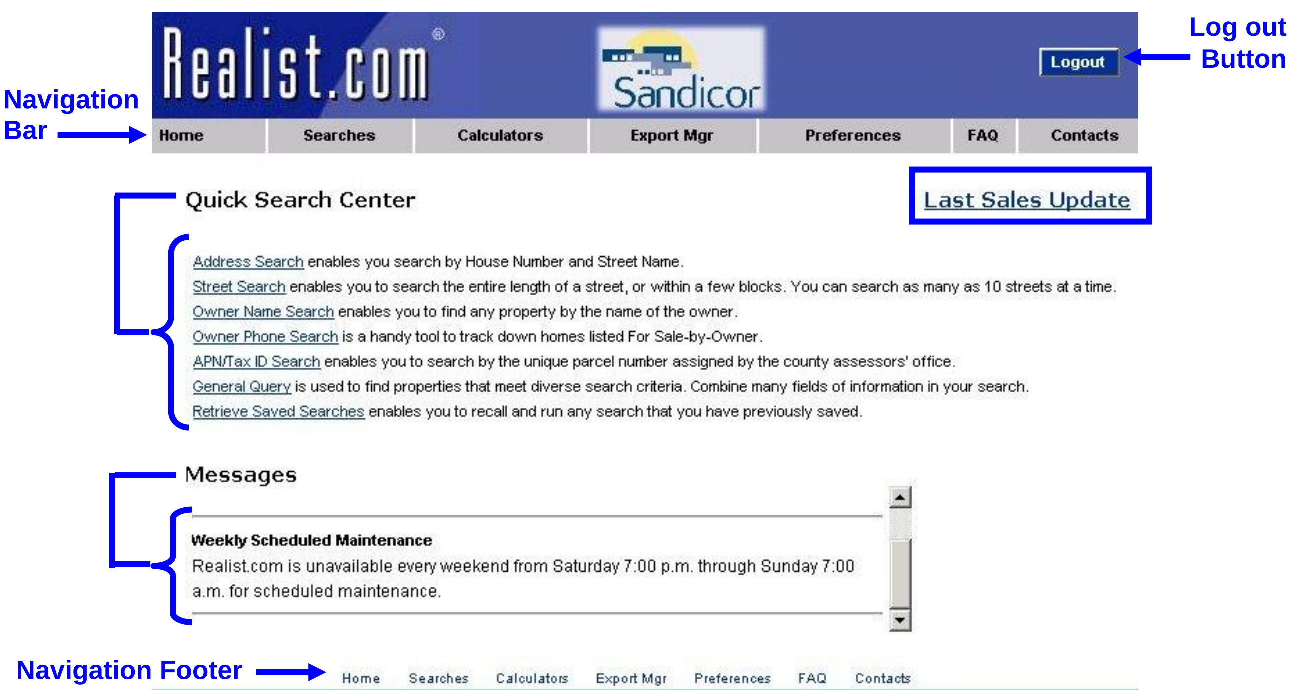

Figure 3: Quick Search Center

- The **Navigation Bar** and **Navigation Footer:** Provide you access to the features of the Realist.com Tax database.
- **Quick Search Center:** Allows you to access the different types of search functions within the Tax database.
- **Messages:** Similar to the messages on the Sandicor **Welcome** page, these are important messages that are updated as needed. You should read these before accessing the tax database.

One of these messages specifies Realist.com maintenance hours. The normal maintenance hours are Saturday 7pm to Sunday 7am. Realist is not available for use during this time. These hours are subject to change, so be sure to review these messages.

- **Last Sales Update:** A new window opens to display the dates that the last sales updates were made to the tax database. Updates include recordings of deed transfers or ownership changes. (Point out the four counties that are searchable: Imperial, Riverside, Orange, and San Diego),
- **Logout Button:** Use this button to log out of the Tax database, o**r** close the window by clicking the Windows **Close** (**X**) button. When the Realist.com **Quick Search Center** appeared, the Tempo MLS system window was left open and should still be available in Microsoft Internet Explorer when you close out of Realist.

You are automatically logged out of Realist after 20 minutes of inactivity. To log back in, close the window and click on the Realist link from Tempo.

NAVIGATING TO DATABASE FEATURES

The Realist.com pages contain both a **Navigation Bar** and a **Navigation Footer** that contain the same links to additional Tax database features.

Figure 4: Navigation Bar

- **Home**: Navigates to the **Quick Search Center** page. Use this page to access all of the search tools in the tax database.
- **Saved Searches**: Navigates to the **Saved Searches** page. Use this page to access, modify, and delete saved searches.
- **Calculators:** Navigates to the available mortgage calculators. Currently the **Mortgage Qualification** and **Mortgage Amortization** calculators are available from this page.
- **Export Mgr:** Navigates to the **Export Manager** page. Use this page to retrieve export files and to view your export status.
- **Preferences:** Navigates to the **My Preferences** page. Use this page to set your **Comparable Property Search** parameters and your **Neighbor Search** parameters.
- **FAQ:** Navigates to the **Frequently Asked Questions** page. Use this page to access additional information on using the tax database features. You can also view and download a PDF version of this information from this page.

- **Contacts:** Navigates to the **Contacts** page. Use this page to identify a human contact for any questions you might have about the tax database or how to use it.
- Use the Realist.com calculators to simplify the task of calculating mortgage amortization and qualification numbers.

Steps to Access Calculators

1. From any **Realist.com** web page, click the **Calculators** button. The **Calculators** page appears.
2. Click the appropriate link to access the desired calculator.

   - Mortgage Qualification calculator: Calculates the maximum mortgage amount for which your client qualifies.
   - Mortgage Amortization calculator: Calculates the monthly, interest, and principal payments.

Use the Mortgage Qualification Calculator

The Mortgage Qualification calculator estimates the maximum mortgage amount for which your client qualifies. To access the calculator click the **Mortgage Qualification** link.

- **All fields**: you may type numbers and decimal points, however, do not type commas or dollar signs.
- **Purchase**: Type numeric values into each field (as appropriate). Home Insurance, Property Tax, and Condo Fee are yearly values. You must type a value in the first four fields.
- **Gross Monthly Income Before Taxes**: Remember these are monthly figures. You must type a value in at least one field.
- **Monthly Expenses**: Remember these are monthly figures. All of these fields are optional.
- **Calculate**: Click this button to calculate the results.
- **Reset**: Click this button to clear all the fields.
- **Help**: Click this button for additional information.

Mortgage Qualification Report

After you complete the **Mortgage Qualification form** and click the **Calculate** button, a new window appears, containing the **Mortgage Qualification Report**.

You can review the report to determine if the values are correct. If they are not correct, click the **Close Window** button. The **Mortgage Qualification form** is still open. You can then make appropriate modifications and click the **Calculate** button to regenerate the report with the new values.

- **Close Window:** Click this button to close the report.
- **Printer Icon:** Click this icon to produce a printer ready report that you can give to your client.

USE THE MORTGAGE AMORTIZATION CALCULATOR

The Mortgage Amortization calculator calculates the monthly, interest, and principal payments. To access the calculator click the **Mortgage Amortization** link.

- **All fields**: you may type numbers and decimal points, however, do not type commas or dollar signs. You must type values in the first three fields.
- **Calculate**: Click this button to calculate the results.
- **Reset**: Click this button to clear all the fields.
- **Help**: Click this button for additional information.

MORTGAGE AMORTIZATION REPORT

After you complete the **Mortgage Amortization form** and click the **Calculate** button, a new window appears, containing the **Mortgage Amortization Report**.

You can review the report to determine if the values are correct. If they are not correct, click the **Close Window** button. The **Mortgage Amortization form** is still open. You can then make appropriate modifications and click the **Calculate** button to regenerate the report with the new values.

- **Close Window:** Click this button to close the report.
- **Calculate Amortization Schedule:** Click this button to generate the **Mortgage Amortization Schedule**.
- **Printer Icon:** Click this icon to produce a printer ready report that you can give to your client.

MORTGAGE AMORTIZATION SCHEDULE

When you click the **Calculate Amortization Schedule** button on the Mortgage Amortization Report, the **Mortgage Amortization Schedule** appears and replaces the **Mortgage Amortization Report**.

- **Close Window**: Closes the window, which deletes the report.
- **Back**: Returns to the Mortgage Amortization Report.
- **Printer Icon**: Prints a printer ready version of the Mortgage Amortization Schedule.

PERFORMING SEARCHES

This chapter explains the Tax preferences and the steps to performing a Tax database search.

TERMS

Results List — The Results List is the list of records you found based upon the search criteria you entered for the search.

Saved Search — A saved search is a search whose criteria you have saved to use again in the future. The purpose of a saved search is to speed the search process and eliminate possible preference errors.

SEARCH STEPS

The following are the steps required to perform a tax database search.

1	**Set Up Preferences**	If you have not already set up your Tax preferences (default values) you should perform this step before proceeding. Otherwise, skip this step. You can change these preferences at any time.
2	**Select a Search Type**	Determine what information you require and then determine the most efficient way to perform the search.
3	**Select a State & County**	Select the state and county records to search. You only need to perform this step once, unless you want to search a different county.
4	**Enter Search Criteria**	Determine the search criteria by typing information and/or selecting parameters. You can perform any of these searches: Address Criteria — Owner Name Criteria APN Criteria — Owner Phone Criteria General Query Criteria — Street Criteria
5	**Perform the Search**	Click the appropriate button to perform the search.

STEP 1: SET UP PREFERENCES

Specific searches of Realist can be customized via the options provided on the Preferences form **(click the Preferences Navigation Bar. Form is displayed.)** The parameters entered on the preferences screen, remain the default parameters until you make a change.

Use the default search parameters on the **My Preferences** screen, to make your search tasks quicker and easier. Realist inserts these defaults automatically when you perform a search.

How to Set Your Preferences

1. From the **Quick Search Center**, click the **Preferences** button in the **Navigation** bar. The **My Preferences** screen appears. It contains all of the search preferences you can set.
2. Modify any or all of the preferences.
3. After setting your Tax search preferences click one of these three buttons:
   - **Save Changes:** Saves all the changes you just made.
   - **Reset Defaults:** Removes all the changes you have **ever** made to your preferences and sets them to the Realist defaults.
   - **Cancel Changes:** Ignores any changes you just made and reverts to the values you set the last time you clicked the **Save Changes** button.

Property Search Options

Option	Default
The maximum number of properties to view on property and neighbor list (1000 max)	100
Number of properties to view per page	25
Include subject property sales shown as pending as of the last update received from the count	No
When viewing lists, sort items alphabetically or numerically	Alphabetically
Enable Image Viewer	No (important to change to yes)

Wild Card Options

Option	Default
When APN/ALT APN, turn auto wildcard	On
When searching Street, turn auto wildcard	On
When searching Subdivision, turn auto wildcard	On
When searching Owner Name, turn auto wildcard	On
When searching Neighborhood Code, turn auto wildcard	On
When searching Seller Name, turn auto wildcard	On

Comparable Property Search Parameters

Option	Default
Total Comps to return	20
Sort Method	Distance from Subject (Closest)
Number of Months Back or Date Range	Number of Months Back: 9 months
Distance from Subject Property	.5 miles
Year Built	Blank
Bedrooms	Blank
Bathrooms	Blank
Gross Living Area difference (%)	Blank
Lot Area difference (%)	Blank
Number of Stories	Blank
Pool	Disregard Option
Land Use	Same as Subject
Geographic Options	Disregard Option
Style (examples: A-Frame, Antique/Historic, Art Deco, etc.)	< All >
Show Street Map on Comps Report	Yes

Neighbor Search Parameters

Option	Default
Distance from subject	.8 miles
Universal Land Use	< All > and Sort by Text
County Land Use	< All > and Sort by Text
Lot Sq. Footage	Blank
Building Sq. Footage	Blank
Sales Options (Record Date, Settle Date, Sale Price)	All are Blank
Marketing Options (Owner Occupied, Has Phone)	All are Does Not Matter

NEIGHBORHOOD PROFILE PARAMETERS

Option	Default
Demographic Data	Include
School Data (Low Grade, High Grade, School Type, Distance)	Include
Business Data (Distance)	Include
Crime Data	Include

STEP 2: SELECT A SEARCH TYPE

The **Quick Search Center** allows you to use the following search types to extract information from the tax database. Based upon the information you currently have and the information you wish to extract, determine the search type to use.

- **Address Search:** Use this search type to locate a record for a single property, by entering a house number and street name.
- **Street Search:** Use this search type to locate records for all properties on a street. If you leave out the direction and prefix values, you can locate records for all streets with the name. You can specify block numbers (e.g. 200 – 300 block) and you can search for up to ten streets in a single search.
- **Owner Name Search:** Use this search type to locate records for all properties owned by a person or corporation. You must type the correct spelling for the name. If you don't know the entire name, type the portion of the name that you do know (e.g. "Johns" would locate records for Johns, Johnson, Johnston, and Johnstone.)
- **Owner Phone Search:** Use this search type to locate records if you only have an owner telephone number. This is a limited search, that only allows a single telephone number and does not allow partial entries. Realist.com does not use the **Zip** code field in this search.

  If the property record does not include the owner's phone number, the property is not included in the results.

- **APN/Tax ID Search:** Use this search type to locate records using the APN/Tax ID of a property. You must include the dashes in the number and can enter a partial number (e.g. 160-210 gives a list of all properties whose APN begins with these numbers).
- **General Query:** Use this search type when you need to locate records with diverse search criteria. It allows you to use multiple fields to select the criteria.
- **Saved Searches:** Use this search type to perform a search using criteria that you have already saved from a previous search.

STEP 3: SELECT A STATE AND COUNTY

The Realist.com tax database contains tax records for multiple states and counties. The Sandicor Tempo MLS system allows you to locate tax records in these counties within the state of California:

- Imperial
- Orange
- Riverside
- San Diego

You must select the California (CA) option
before Realist.com presents the list of available counties.

Once you have selected the state and county, Realist.com "remembers" this selection so you do **not** have to select it every time you use the database. Each search requires the **State** and **County** criteria.

MAKING THE STATE & COUNTY SELECTION

1. Select any search type from the **Quick Search Center**. The search form appears.
2. From the **State** drop-down list, select: **CA**.
3. From the **County** drop-down list, select one of the four available counties.

STEP 4: ENTER SEARCH CRITERIA

Search criteria limits the number of records presented to you in the search results. The search criteria you need to enter is different based upon the search type you select. The following are search forms you will use to enter search criteria.

ADDRESS SEARCH FORM

Field	Description
Zip	Select one or more zip codes from the drop-down list (using the [Ctrl+Click] method). This is helpful because the street names may exist in several zip codes (e.g. Main Street). The field will allow you to put up to 10 zips
House Number	Type a partial or full house number. A partial number acts like a wild card, by searching for anything that begins with that number.
Pre-Direction	Select a street direction from the drop-down list. Keep in mind that the direction may not be identical in the property record. (set by parameter, wildcards to cover variations).
Street Name	Type a partial or full street name (e.g. “Bernardo” would give you “Bernardo Center” and “Bernardo Heights”).
Street Suffix	Type a street suffix to limit the number of records retrieved. (set by parameter, wildcards to cover variations).
Unit Number	Type a unit number if appropriate. If you do not supply a unit number, all units will appear for that street

You need to establish your parameter defaults, because you need to keep in mind that the street suffix in the property record may not be identical to the value you type into this field by the assessors office. For example, the record may indicate St, Street, no value, or entered an incorrect value.

STREET SEARCH FORM

This search form allows you to locate records for up to ten different street address ranges.

Field	Description
Zip	Select one or more zip codes from the drop-down list (using the [Ctrl+Click] method). This is helpful because the street names may exist in several zip codes (e.g. Main Street). The field will allow you to put up to 10 zips
Street Dir	Select a street direction from the drop-down list. **Keep in mind that the direction may not be correct in the property record.** (set by parameter, wildcards to cover variations).
Street Name	Type a partial or full street name (e.g. “Oak” would give you “Oak” and “Oaks North”).
Suffix	Type a street suffix to limit the number of records retrieved. (set by parameter, wildcards to cover variations).
Low #	Type a block or house number as the beginning value to include in the results.
High #	Type a block or house number as the highest value to include in the search results.
Sales Options	You may type and/or select additional criteria from the sales record portion of the tax record.
Marketing Options	You can limit the list by specifying whether the owner has a phone number and whether the property is owner occupied.

You need to establish your parameter defaults, because you need to keep in mind that the street suffix in the property record may not be identical to the value you type into this field by the assessors office. For example, the record may indicate St, Street, no value, or entered an incorrect value.

OWNER NAME SEARCH

Use this search type to locate records for all properties owned by a person or corporation. You must type the correct spelling for the name. If you don’t know the entire name, type the portion of the name that you do know (e.g. “Johns” would locate records for Johns, Johnson, Johnston, and Johnstone).

Default wildcard settings, under preferences, pick up letters and words that follow what you entered. (for example: Ander = Anderson, Andersen, etc) before Realist.com presents the list of available counties.

- **Owner Last Name or Corporation Name:** You are required to type a value in this field. This field is also searchable for Trusts.
- **Owner First Name & Middle Initial**: This is an optional field.

Owner Phone Search

Use this search type to locate records if you only have an owner telephone number. This is a limited search, that only allows a single telephone number and will not work if partial number is entered. Realist.com does not use the **Zip** code field in this search.

- **Phone Number:** You must type a 10-digit number in this field, including dashes. Do **not** enter, parenthesis, or spaces in this field.

If the property record does not include the owner's phone number, the property is not included in the results.

APN/Tax ID Search

Use this search type to locate records using the APN/Tax ID of a property.

- **APN**: You must type the **APN/Tax ID** into this field. A full APN number is typed as 123-123-12-00.

You must include the dashes in the number and you can enter a partial number (e.g. 160-210 gives a list of all properties whose APN begins with these numbers).

General Query

This search type allows you to use multiple fields to select the criteria.

Field	Description
Property Characteristics	Type values or select options that match the criteria of the properties for which you are searching.
Geographic Options	Type the subdivision name in this field if you want to include it as a search option. Keep in mid that the subdivision value in the property record may not be identical to the value you type into this field, or the field may be blank.
Owner Name	Type the owner last name in this field to include it as a search option. This can be the name of a person or a company
Sales Options	Type the Record date range or Sales Price range to include them as search options
Marketing Options	You can limit the list by specifying whether the owner has a phone number and whether the property is owner occupied.

Saved Searches

Use this search type to perform a search using criteria that you have already saved from a previous search type. This document covers this topic in detail in the **Saved Searches** chapter.

STEP 5: PERFORM THE SEARCH

Once you have entered the search criteria, you can perform the search. The following buttons are available for all searches **except** the Saved Search.

- **Search:** Click this button to retrieve the property details matching the search criteria.
- **Clear Screen:** Click this button to clear the fields and any other selections you made to the search criteria. This gives you a fresh start.
- **Save Search:** Click this button to save the search to the Saved Search List.

PROPERTY LIST

After entering your search criteria, The **Property List** appears in either the **multi-line or single-line view.** View options appear on the far left side of the Property List and you can set them accordingly.

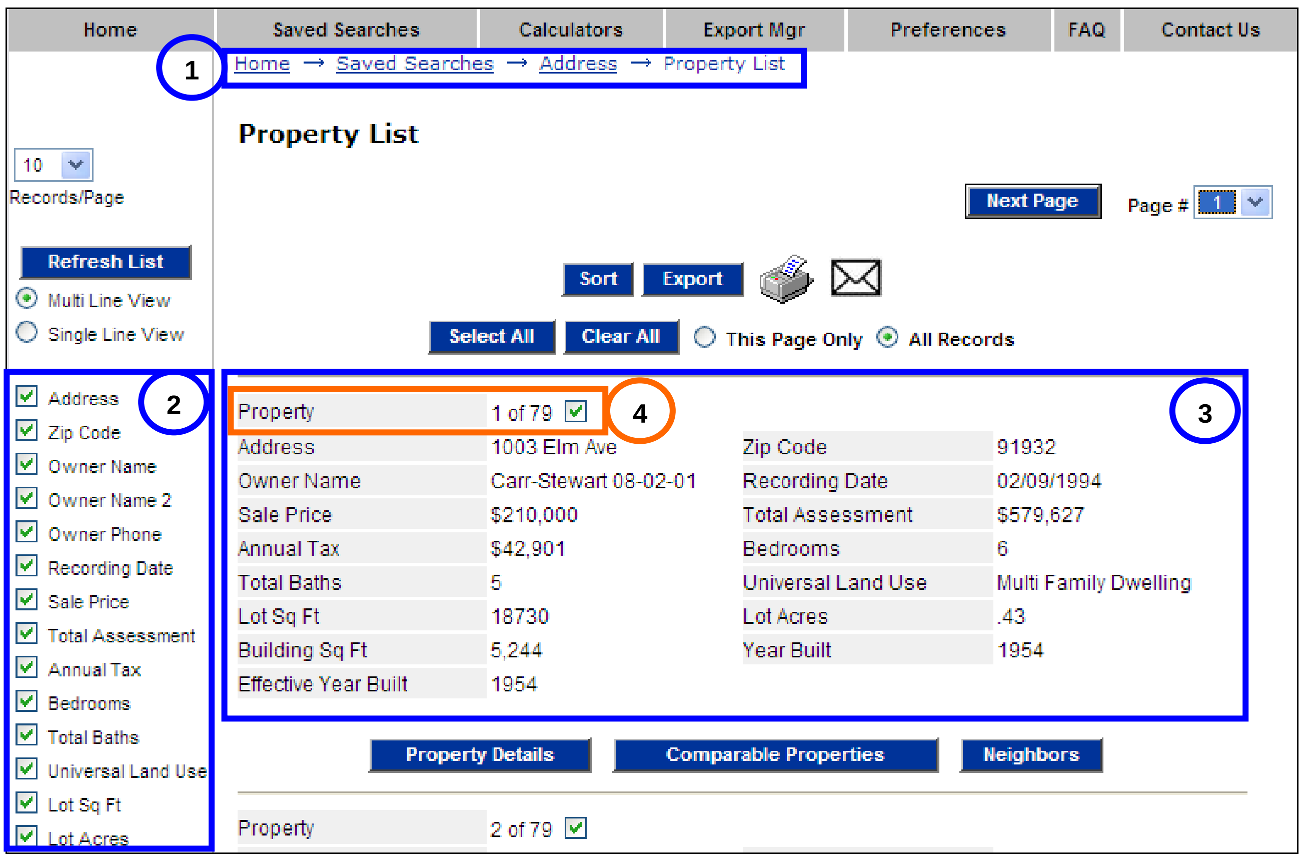

Figure 5: Property List

The following table identifies the elements on this page. Some areas do **not** have names. They have been numbered in this image and their descriptions are included in the following table.

Element	Description
1	This is the **History Links**. You can use this to navigate backward to a previous page. Realist.com displays the links in the order in which you navigated to the current form. In the example above, the current link is the **Property List,** to return to the search form, click on the link prior to the **Property List** link (in our examples, it is the **Address** link). **DO NOT** use the **BACK** button on your browser to return to the search form. Instead, use these history links.
2	This is the list of **Available Fields**. By selecting or deselecting the check boxes, you determine what fields appear in the property description. If you are going to print or e-mail the report, this identifies which fields are printed and/or e-mailed.
3	This is the **Property Description**. The contents of the property description are determined by the selected fields in the Available Fields areas (#2). All of the properties that match your search criteria appear in the list. The number of properties that appear on one page are determined by the **Records/Page** drop-down list on the left.
4	This is the **Property Identifier**. This is a temporary identifier and helps you to identify the property as it pertains to this search results list. The highest number is the total number of records that matched the search criteria that are currently in the list. The check box next to the number when checked identifies this property as selected for other functions. For example, when you print the list, only selected properties are included in the printed report.
Records Per Page	This drop-down list allows you to determine how many properties are listing on one page. (Established by preferences)
Refresh List button	You would click this button after changing the available fields or changing the Multi Line or Single Line view radio button. This allows the property descriptions to be updated.
Multi Line View or Single Line View	These radio buttons allow you to view the list as shown (multiple lines) or with all of the property description details listed on one line.
Next Page button	If the results list contains more than one page, you would click this button to go to the next page in the Results List.
Page #	This drop-down list contains the numbers of all the pages in the results list. You can use this feature to go directly to a specific page.
Sort button	This button navigates you to a page whereby you can determine the sort order for the properties in the list. You can select the fields and determine whether they are sorted in ascending or descending order.
Export button	You would click the Export button to send data to another program, such as a spreadsheet, to produce labels for example. Click this button to export the records in the list to a label, Excel, or ASCII text file that you can retrieve later.
Printer icon	You would click the printer icon when you are ready to print the report. Remember that you can control the content of the report by selecting the fields that will appear(see #2 Available Fields) and by selecting the properties to appear (see #4 Property Identifier and the **This page only OR All records** option).

Element	Description
E-mail icon	You would click the e-mail icon when you are ready to e-mail the report. Remember that you can control the content of the report by selecting the fields that will appear(see #2 Available Fields) and by selecting the properties to appear (see #4 Property Identifier and the **This page only OR All records** option).
This page only OR All records	These radio buttons control which property descriptions are printed or e-mailed. • **This page only**: select this radio button to print all the properties on the currently displayed page. Remember, the number of properties included are determined by the **Records/Page** drop-down list. • **All records:** select this radio button to control the properties e-mailed or printed by selecting or deselecting properties using the property identifier check box (see #4 above).
Select All button	Click this button to select all of the properties in the results list. Note: by default, all of the properties are selected.
Clear All button	Click this button to deselect all of the properties in the results list.
Property Details button	There is a Property Details button for each property description. Click this button to view additional information about the property.
Comparable Properties button	There is a Comparable Properties button for each property description. Click this button to generate a list of Comparable Properties, based on some default values you previously set up.
Neighbors	There is a Neighbors button for each property description. The Neighbors button generates a list of the closest neighboring properties, up to a radius you previously set up in your Tax preferences.

Property Details Screen

Before printing the report, you may want to review the details of each of the properties.

1. To review the property details for a specific property, click the:
   - **Property Details** button beneath the property information when viewing the report in **Multi Line View**.
   - **Details** button next to the property information when viewing the report in **Single Line View**.

2. The **Property Details** page for the selected property appears.
   - **Information Options**: The check boxes on the left side of the page allow you to select the information you want to view. To save spaces, we selected only the Owner Information for this example. A check in the box next to the option selects the option.
   - **Refresh Page**: Click this button to refresh the page after you change the Information Options. The options selected will now be displayed.
   - **Next**: Click this button to view the next record on the list, without having to return to the property list.

- **Comparable Properties**: Click this button to view a list of properties that are comparable to this property. From this list, you can select properties and create a Comparable Candidates Report for this property. This will be covered later in this lesson.
- **Neighbors**: Click this button to search for a list of properties near this property. You can use or change the Neighbor Search default preferences. This will be covered later in this lesson.
- **Street Map**: Click this button to view a Map Quest street map that shows the location of this property.
- **Assessor Map**: Click this button to access and view the Tax Map for this property.
- **Neighborhood Profile**: Click this button to access and view Demographics, Schools, Business Data, and Crime Stats.

CREATE A NEIGHBORHOOD PROPERTY PROFILE

You can create a Neighborhood Property Profile for a specific property. The resulting report can include local demographics, school information, business information and crime statistics. To create the profile:

1. Perform a search to retrieve the properties that match your search criteria.
2. From the **Property List**, click the **Property Details** button for the property.
3. From the **Property Details** screen, Click the **Neighborhood Profile** button.
4. The **Neighborhood Profile Options** screen appears. It contains the options saved in your Tax preferences. You can modify these settings now to specify different criteria.
5. You would then click the **Submit** button.

*Changing these values on this screen does **not** change your Tax Preferences. If you decide that you want to change your preferences for the future, click the **Preferences** button on the **Navigation** bar.*

CREATE A CMA REPORT

You can create a Comparative Market Analysis (CMA) report based upon a specific property. To create the report:

1. Perform an address search to retrieve the subject property.
2. From the **Property List**, click the **Property Details** button for the property.
3. From the **Property Details** screen, click the **Comparable Properties** button.
4. Your **Comparable Property Search Options** are presented so that you can adjust the default parameters. These parameters control which properties are selected for the Comparable Properties list.
5. Click the **Get Comparables** button. If you want to make the adjustments permanent, click the **Save and Get Comparables** button. Your default parameters for selecting comparable properties are changed and saved.
6. The **Property Comps** screen appears. You may select individual properties to be included in the final report or you may click the **Select All** button.
7. Click the **Generate Comp Report** button to generate the report.

8. A multi-page report is generated which you can print or e-mail using the icons at the upper right. Then click the Windows **Close** (**X**) button to close the report window.
9. You can now use the **History List** to return to the desired page.

Create a Neighbor Report

This report identifies properties in close proximity to the subject property.

1. Perform a search to retrieve the properties that match your search criteria.
2. From the **Property List**, click the **Property Details** button for the property.
3. From the **Property Details** screen, click the **Neighbors** button.
4. The **Neighbor Search** screen appears. Similar to selecting comparable properties, this screen allows you to adjust the parameters used to select neighboring properties.
5. Click the **Get Neighbors** button. If you want to make the adjustments permanent, click the **Save and Get Neighbors** button. Your default parameters for selecting comparable properties are changed and saved.
6. The **Neighbors** screen appears. It is formatted just like the **Property List** page, but includes only the neighboring properties that match your search criteria.
7. This list can be printed, e-mailed or manipulated just like the **Property List** page. You would return to the **Property Detail** page by clicking the **Property Detail** link in the **History List**.

Access a Street Map

The street map identifies the location of the property using Map Quest.

1. Perform a search to retrieve the properties that match your search criteria.
2. From the **Property List**, click the **Property Details** button for the property.
3. From the **Property Details** screen, click the **Street Map** button.
4. If the system can locate the property on a map, the **Street Map** screen appears with the full address of the property and a link to the map. You would click the **Street Map** link to view the map.
5. The street map appears. You can pan or zoom the map. You can print the map by clicking the printer icon.
6. You would click the Windows **Close** (**X**) button to close the window.

Access the Assessor Map

The assessor map feature presents the tax map for the property.

1. Perform a search to retrieve the properties that match your search criteria.
2. From the **Property List**, click the **Property Details** button for the property.
3. From the **Property Details** screen, click the **Assessor Map** button.

If the system can locate the assessor map, the **Assessor Map** screen appears. This screen includes the following information:

- Full address of the property
- **Tax ID** for the property (includes the assessors lot number for the property). You would note this ID so that you can locate the property on the map. The assessor's lot number is the next-to-the-last set of digits in the ID. For example, if the Tax ID were 313-301-**26**-53, then the assessor's lot number is **26**.
- **Block** identifier for the property (includes the developers **Lot** number for the property). You would note the Lot number so that you can locate the property on the map.
- One or more **Map** links for the property. For single residence properties, there should be only one link. However, for large condominium properties, there may be multiple map links.

4. You would click the **Map** link to view the assessor map. The map opens in a new browser window.
5. You may need to use the zoom feature to read the details on the map. You would locate the property by using the assessor's lot number and/or the developer's lot number.
6. You would click the Windows **Close** (**X**) button to close the map window.

SAVED SEARCHES

TERMS

Results List	The Results List is the list of records you found based upon the search criteria you entered for the search.
Saved Search	A saved search is a search whose criteria you have saved to use again in the future. The purpose of a saved search is to speed the search process and eliminate possible preference errors.
Search Types	The types of searches you can perform and save are: Address search, Street search, Owner Name search, Phone Number search, APN/Tax ID search, or General Query. Lesson 2 describes these in more detail.

CREATE A SAVED SEARCH

You can create a saved search from any search type.

1. Select the search type (Address, APN/Tax ID, General Query, Owner Name, Owner Phone Number, or Street).
2. Enter the search criteria.
3. Click the **Save Search** button. The **Save Search** screen appears, containing your search parameters.
4. Type a meaningful name for your search in the "**Please enter a name for your search**" field.
5. Click the **Save Search** button to save the search.

USE A SAVED SEARCH

Once you have created a saved search, Realist "remembers" the search until you delete it.

To access and use the saved search, follow these steps:

1. Click the **Saved Searches** button on the Navigation bar. (Or from any search type screen, click the **Saved Searches** link on the left hand side of the form.) The **Saved Searches** screen appears.

Home → Search

Saved Searches

Delete Checked Searches

These are your saved searches:

	Search Name	State	County	Search Type	Date Created	Date Modified
☐	123 Main - Anywhere	CA	San Diego	Search Address	Oct 15 2002	Oct 15 2002
☐	Main 100-200	CA	San Diego	Search Street	Oct 10 2002	Oct 10 2002

Figure 6: Saved Searches List Form

- **Search Name**: This column contains the saved search name. When you click on the name, Realist.com displays the search form you used to create the search. The form contains all the criteria you selected and saved.
- **State**: This column identifies the state for this search. Tempo sets this to CA (California).
- **County**: This column identifies the county database in which Tempo searched.
- **Search Type**: This column identifies the type of search you used to create this saved search.
- **Date Created**: This column identifies the date you originally created the saved search.
- **Date Modified**: This column identifies the date you last modified the saved search.

2. Click the **Search Name link** of the search you wish to perform.
3. The search screen you used to create the search and the search criteria you saved appear. To perform the saved search:
   a. Make no modifications to the screen and click the **Search** button.
   b. Modify the criteria and then click the **Search** button.

DELETE A SAVED SEARCH

1. Click the **Saved Searches** button on the navigation bar. The **Saved Searches** page appears.
2. Select the check box next to the name you want to delete. You may select one or more names.
3. Click the **Delete Checked Searches** button. Tempo removes the search from the list.

EXPORTING INFORMATION

TERMS

Export	This is the process of copying tax database information to a file that you can retrieve and use for marketing purposes.
Export Builder	This tool allows you to specify the format of the export file and the information contained in the file.
Export Manager	This tool allows you to open and save the files created by the Export Builder.
Search Types	The types of searches you can perform are: Address search, Street search, Owner Name search, Phone Number search, APN/Tax ID search, or General Query. Lesson 2 describes these in more detail.

EXPORT PROCEDURES

The **Export** button is available whenever you view a **Property List** or **Neighbor List**. To use the export feature, click the **Export** button and follow the steps to build an export record. The **Export Builder** screen appears, containing a brief summary of your data export activity. Sandicor users are allowed to export up to 5000 records each month without charge.

EXPORT BUILDER

You use the **Export Builder** to export records from the Tax database. The following are the general areas of the screen:

- **Export File Content:** The exported records can contain two different types of data (**Labels** or **Full Record**). Other areas related to these formats are discussed in the sections below.
- **Export Status:** This area provides the status of the number of property record downloads allowed, number of records already retrieved, and the number of records remaining.
- **Your Search Parameters:** This area reflects the search criteria you specified. Review this information to be sure you are retrieving the correct information.

LABEL FORMAT OPTION

When you select this export option, the data exported will be the data you would expect on a mailing label. These are the fields that are may be included in the exported data, depending upon the type of mailing address you select and whether you customize the salutation with the Owner's name:

- Full Address of the Property
- Owner Name
- Tax Billing Address
- Tax Billing City & State
- Tax Billing Zip Code
- Tax Billing Zip + 4
- Tax ID

Once you have selected this format, you can specify whether you are mailing to the **Property Address** (possibly renters) or the **Tax Billing Address** (i.e., the owner). Since some owners may own several properties in a single neighborhood, you may choose to **Eliminate duplicate labels**.

Formatting for three standard sizes of Avery labels are available and generate a Microsoft Word file ready to print directly onto labels. You may also generate a file in either Microsoft Excel of ASCII data format for further manipulation. In addition, you can customize the salutation for the labels and also include the Owner's name.

FULL RECORD FORMAT OPTION

The **Full Record** option allows you to determine the fields you want to export. A complete tax record includes many fields. Some may not be useful to you. Clear the check-box for any fields you do **not** want included in the data export in the **Fields to Print on Full Record Exports** area. You can select to export the records in Excel or ASCII format.

EXPORT MANAGER

You use the **Export Manager** to retrieve exported records from the Tax database. If you recently exported records and the file does **not** appear in the **Exports Ready to Pick Up list**, check back later. The amount of time it takes to extract the records from the Tax database is dependent upon the number of records you are extracting and the level of activity of other agents extracting records at the same time.

The **Export Manager** screen contains three main areas of interest.

1. **Exports Pending:** This area displays export records that are pending. When available they appear under **Exports Ready to Pick Up.**
2. **Exports Ready to Pick Up:** This area contains information about files you have **not** yet picked up. It reports the date and time the file was processed, the file type, and format and the number of records included in the file. The most recent export is located at the top of the list.

   Click the name of the file in the **File Name** column to download and open the file. Once you have opened the file, the **Export Manager** removes the name from this list and places it under the **Exports Already Picked Up** list.

3. **Exports Already Picked Up:** This area contains information about files you have already picked up. It reports the date and time the file was downloaded, the file type and format, and the number of records included in the file. The most recent export is located at the top of the list.

   Click the name of the file in the **File Name** column to download and open a file previously opened

4. **My Export Status This Month:** This area reports on the number of records you have exported, whether or not you have picked up the files. It includes the total number allowed per month and the number of records you can still download for the month.

Retrieve Exported Records

To retrieve the records you exported, access the **Export Manager**.

1. From the Navigation bar, click **Export Mgr**. The **Export Manager** page appears.
2. Click the name of the file in the **File Name** column for the file you wish to download and open. The **File Download** dialog appears.

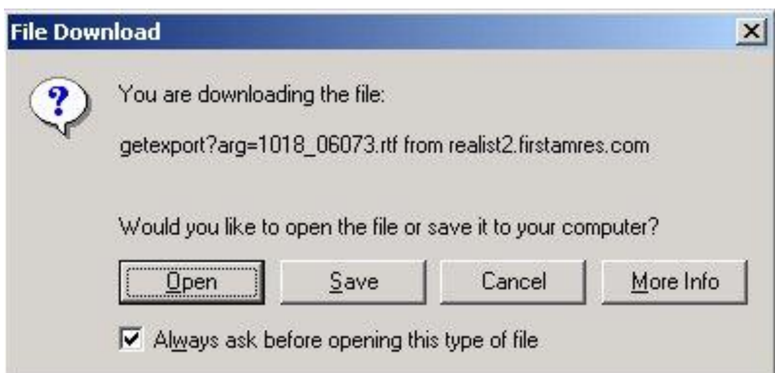

Figure 7: File Download Dialog

   a. Click **Save** to download the file and save it to your computer. You can open the file after you save it.

   b. Click **Open** to download the file and open it. The **Export Manager** opens the file and saves it in a temporary directory on your computer. If you do not save the file before exiting it, Tempo does **not** save the file. You can save the file yourself by performing a **File > Save**.