Accessing Public Records Using NTREIS Tax

TREC Approved Course 03-00-12526369

Provider 0011

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Welcome to NTREIS Tax (Realist)

NTREIS Tax is a richly featured, public record service that is fully integrated with your MLS system. It is an easy-to-use system with many powerful features to assist you in listing, selling, farming or prospecting more effectively.

How to Access NTREIS Tax

You can only access NTREIS Tax by logging into the MLS system and select "Tax" from the menu at the top of the screen. NOTE! The first time you visit NTREIS Tax, you will see an End User License Agreement. Please read carefully and select "I Accept" at the bottom of the page. You will not have access to NTREIS Tax until you select this option and click "Submit"

Information Found on a Tax Record

Listed below are some of the basic information and services typically contained in a typical tax report:

Property data includes:

- **Assessor data**
- **Sale and mortgage data**
- **Foreclosure and Bank Owned Activity**
- **Phone numbers**
- **Privacy encoding (National Do-Not-Call List and No Mail List)**

Software services include:

- **Address, street, owner, tax-id, and phone number searches**
- **General query search**
- **Maps, with support for searching, labels, identify, aerial and parcel views**
- **Saved searches**
- **Personally customize list and detail reports**
- **Personal preferences to control a variety of system services, such as the automatic comparable and neighbor searches**
- **Auto-population when adding a new MLS listing**
- **Link from a tax record directly to a corresponding MLS record**

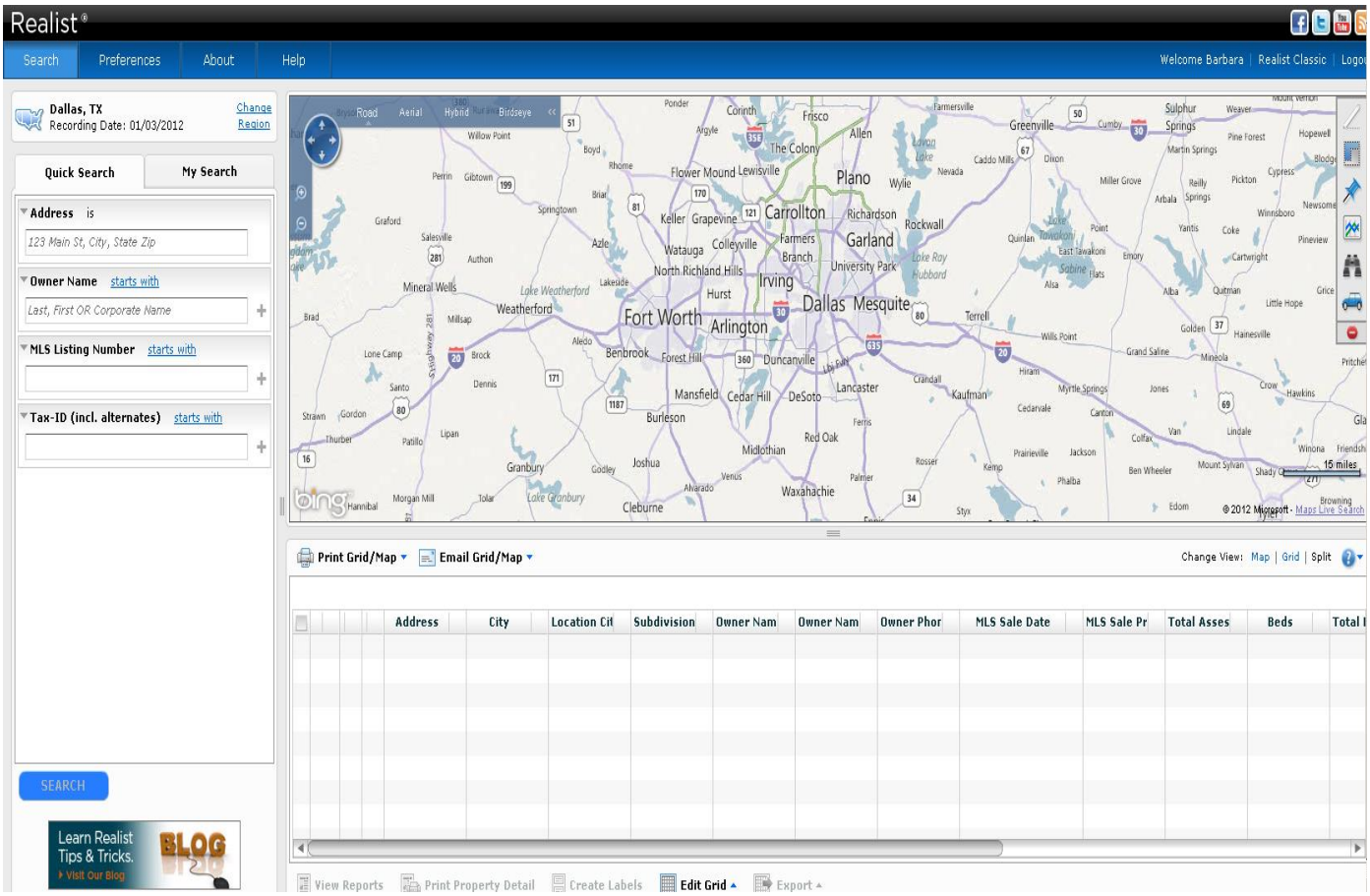
Comparable services include:

- **Maps, available in some locales with aerial and parcel overlays**
- **Automatic comparable sales searches and enhanced reports**
- **Neighbor search for radius based on searches for comps and marketing**

Export services include:

- **Mailing labels exported to MS Word documents**
- **Exports to MS Excel**

NTREIS Tax (Realist) Home Page



Quick Search

A Quick Search is the default form that appears on the home screen when you log into Tax. The Quick Search is a quick way to find a property based on simple attributes like the Address, Owner Name, Listing Number, or APN/Folio/Tax ID.

The example on the left shows how to search by an owner and a company name.

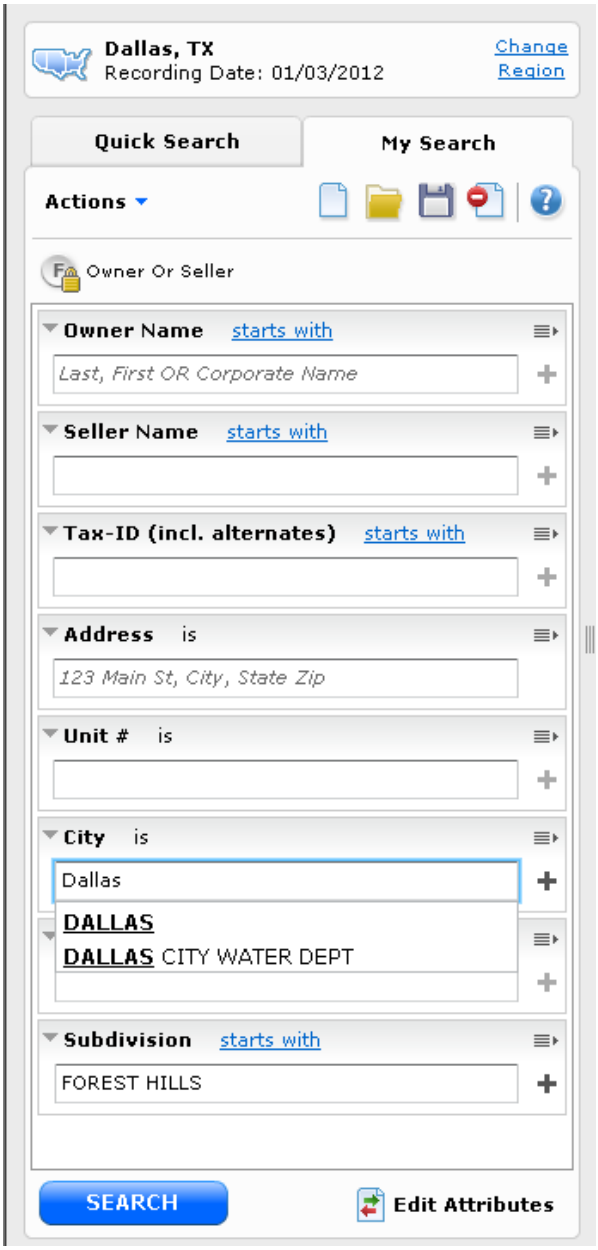
My Search

My Search enables you to save Searches that remember the fields (attributes) you wish to search. Such as Subdivision, City, Zip Code, Owner Name, etc. This would be a "Saved Form"

You may also save the search criteria you have entered. This would be a "Saved Search"

My Search contains a set of standard forms that the MLS administrator has configured. You can also create up to 50 of your own customized forms. Saved forms will remember the fields to be searched, but will not retain any search criteria

Search using the fully customizable My Search feature to search for properties and related public record and MLS data. Use this flexible, fully configurable search to find properties by one or more search criteria

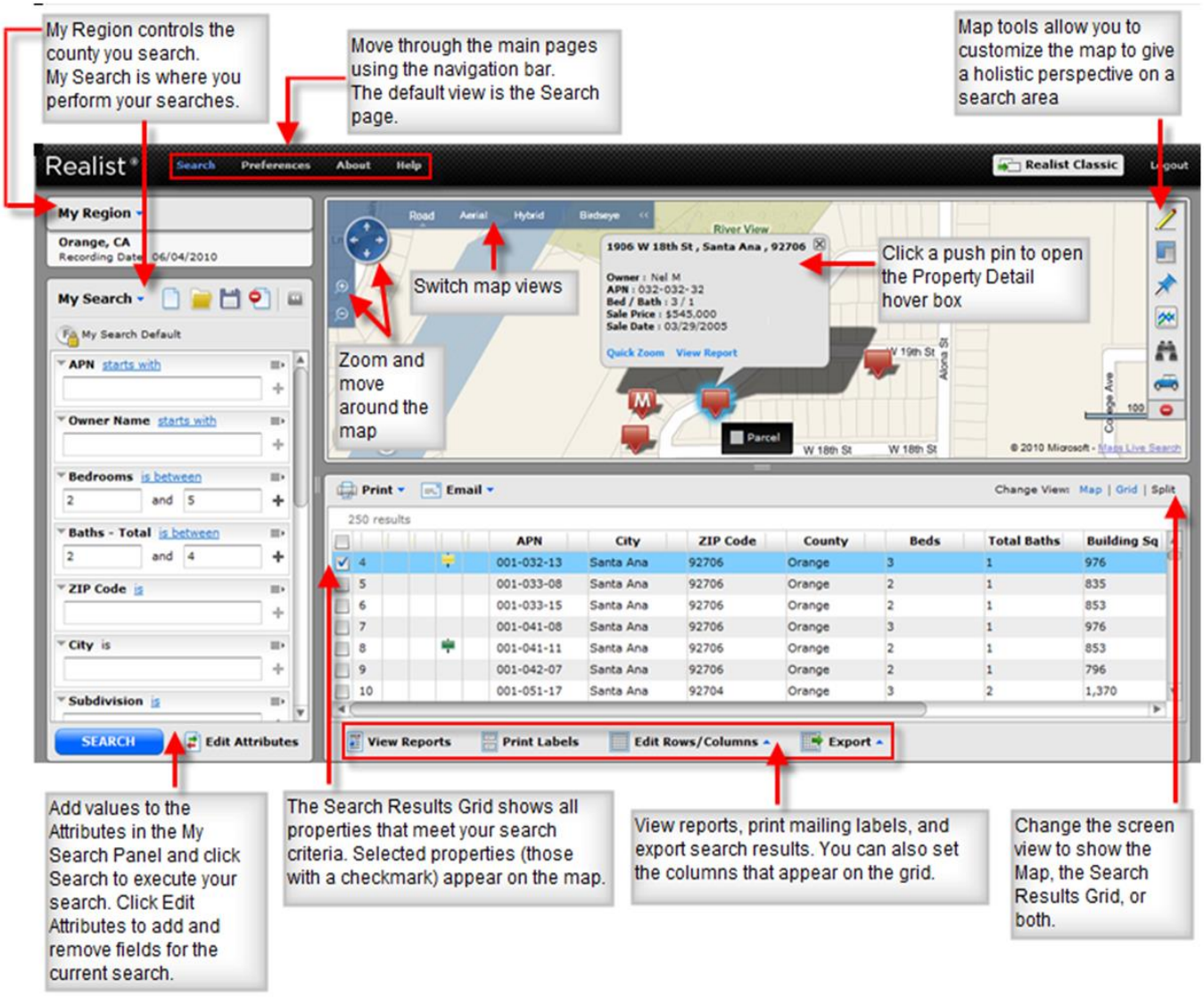


The example on the bottom left shows a city name and a subdivision name search.

Notice: When you start to type in a city name, a list with that name may appear.

A list of Subdivisions will also appear when entering a subdivision name.

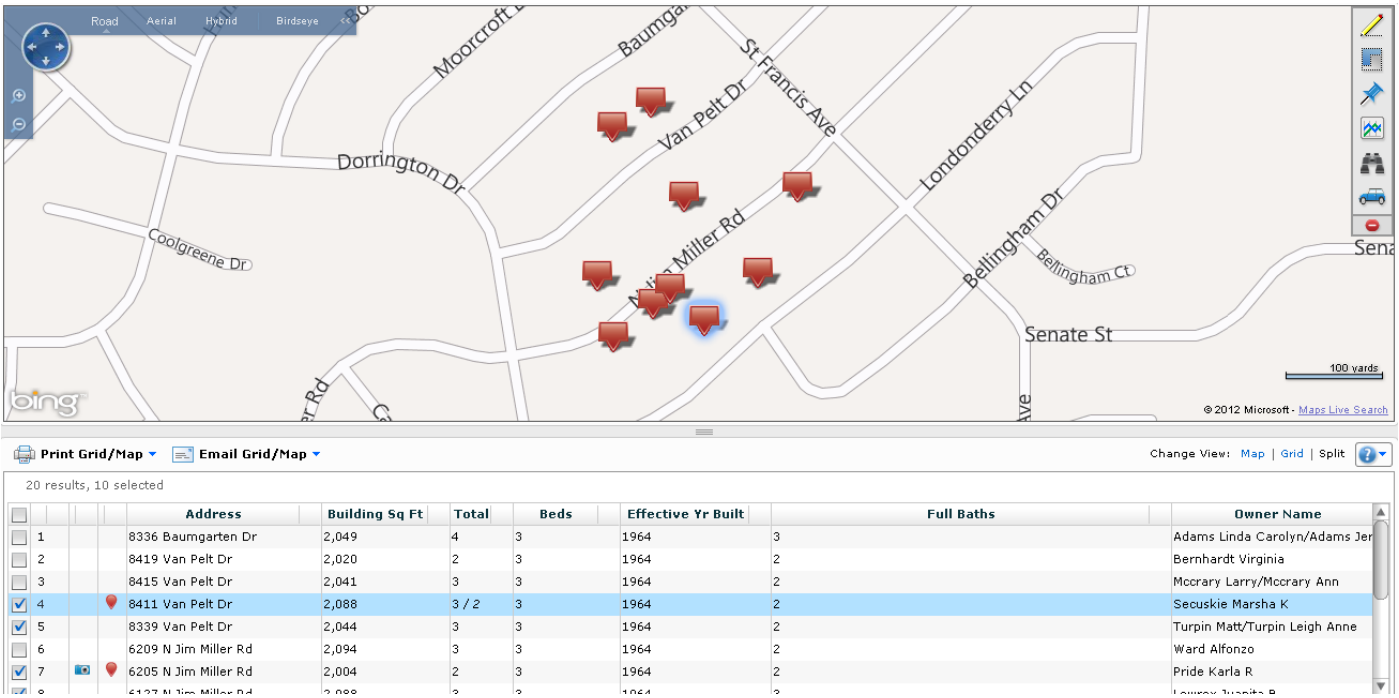
Search Results Screen



Working with the Results

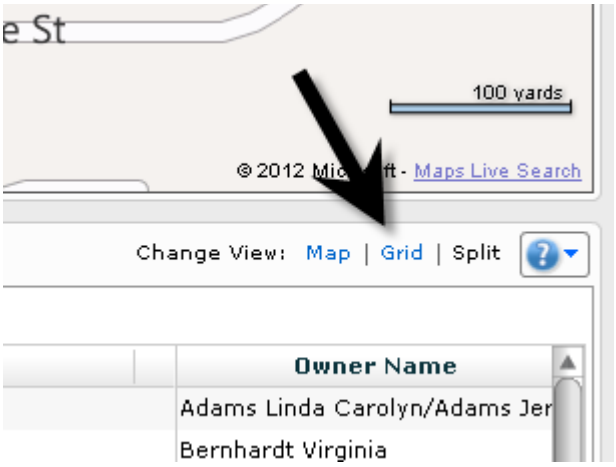
Search Results Screen

When you first see search results on the screen it will look like this:



	Address	Building Sq Ft	Total	Beds	Effective Yr Built	Full Baths	Owner Name
1	8336 Baumgarten Dr	2,049	4	3	1964	3	Adams Linda Carolyn/Adams Jer
2	8419 Van Pelt Dr	2,020	2	3	1964	2	Bernhardt Virginia
3	8415 Van Pelt Dr	2,041	3	3	1964	2	Mccrary Larry/Mccrary Ann
4	8411 Van Pelt Dr	2,088	3 / 2	3	1964	2	Secuskie Marsha K
5	8339 Van Pelt Dr	2,044	3	3	1964	2	Turpin Matt/Turpin Leigh Anne
6	6209 N Jim Miller Rd	2,094	3	3	1964	2	Ward Alfonzo
7	6205 N Jim Miller Rd	2,004	2	3	1964	2	Pride Karla R

If you wish only to see the property records without the map click Grid found between the map and property information on the right side of the screen. If you only wanted to see the map, you would select Map.

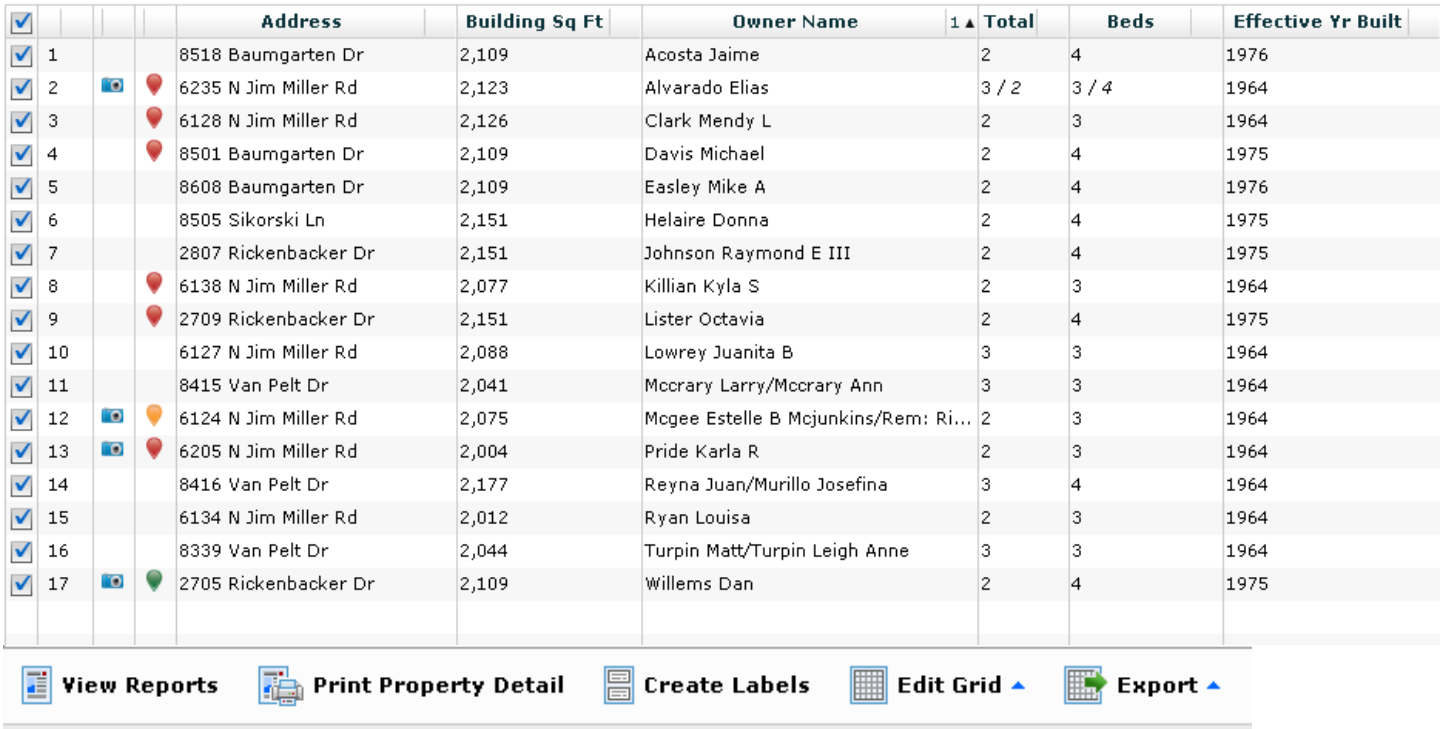


Search Results Grid

To select records, click in the small white box to the left of the position number. To select all records, click in the small white box at the top of the column.

To select records 4 thru 9 you would select record 4 then hold down your shift key and while holding it down, select record 9.

To remove unselected record, click Edit Grid found at the bottom of the screen, then select Show Only Selected Rows. This will remove any record that is not checked.

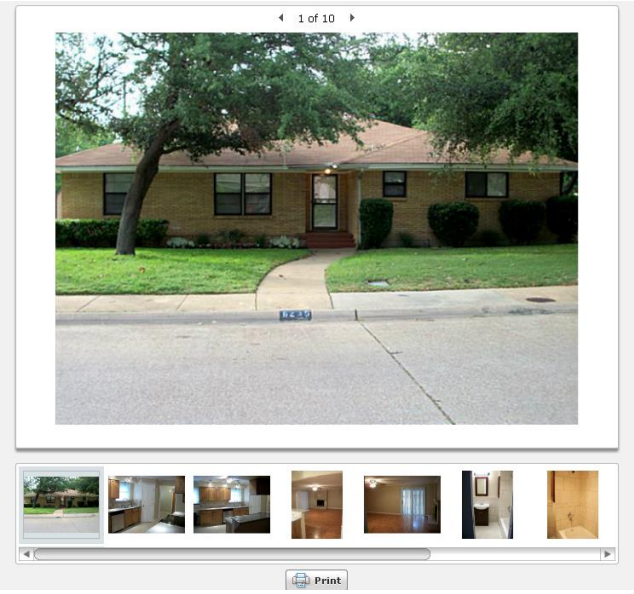


			Address	Building Sq Ft	Owner Name 1 ▲	Total	Beds	Effective Yr Built
1			8518 Baumgarten Dr	2,109	Acosta Jaime	2	4	1976
2			6235 N Jim Miller Rd	2,123	Alvarado Elias	3 / 2	3 / 4	1964
3			6128 N Jim Miller Rd	2,126	Clark Mendy L	2	3	1964
4			8501 Baumgarten Dr	2,109	Davis Michael	2	4	1975
5			8608 Baumgarten Dr	2,109	Easley Mike A	2	4	1976
6			8505 Sikorski Ln	2,151	Helaire Donna	2	4	1975
7			2807 Rickenbacker Dr	2,151	Johnson Raymond E III	2	4	1975
8			6138 N Jim Miller Rd	2,077	Killian Kyla S	2	3	1964
9			2709 Rickenbacker Dr	2,151	Lister Octavia	2	4	1975
10			6127 N Jim Miller Rd	2,088	Lowrey Juanita B	3	3	1964
11			8415 Van Pelt Dr	2,041	Mccrary Larry/Mccrary Ann	3	3	1964
12			6124 N Jim Miller Rd	2,075	Mcgee Estelle B Mcjunkins/Rem: Ri...	2	3	1964
13			6205 N Jim Miller Rd	2,004	Pride Karla R	2	3	1964
14			8416 Van Pelt Dr	2,177	Reyna Juan/Murillo Josefina	3	4	1964
15			6134 N Jim Miller Rd	2,012	Ryan Louisa	2	3	1964
16			8339 Van Pelt Dr	2,044	Turpin Matt/Turpin Leigh Anne	3	3	1964
17			2705 Rickenbacker Dr	2,109	Willems Dan	2	4	1975

View Reports | Print Property Detail | Create Labels | Edit Grid | Export

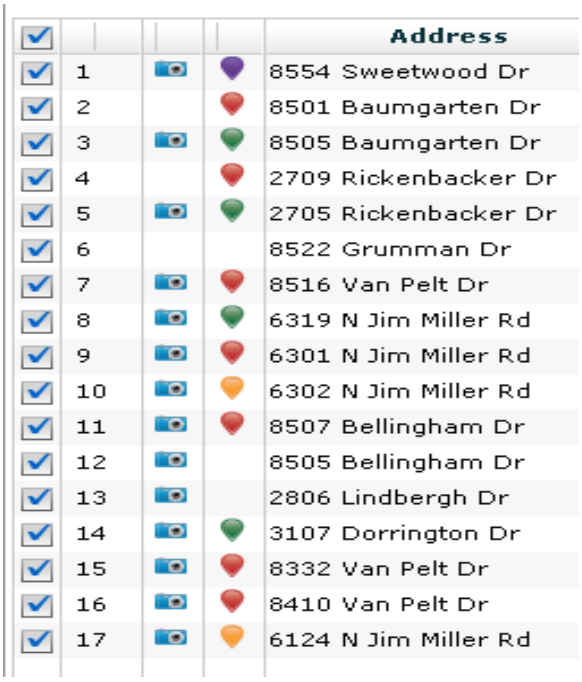
Camera Icon

The camera icon indicates a photo or photos are available to view. When you select Print, all the photos will print.



MLS Indicator Balloons

If a property is currently in MLS there will be a small balloon indicating the current MLS status of that property.

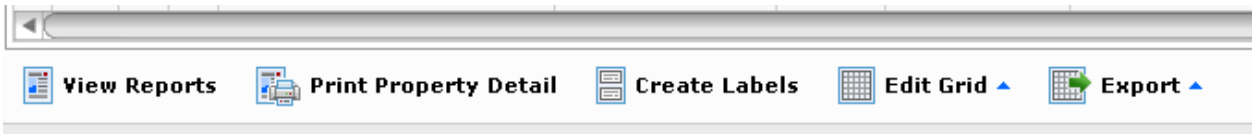


		Address
1		8554 Sweetwood Dr
2		8501 Baumgarten Dr
3		8505 Baumgarten Dr
4		2709 Rickenbacker Dr
5		2705 Rickenbacker Dr
6		8522 Grumman Dr
7		8516 Van Pelt Dr
8		6319 N Jim Miller Rd
9		6301 N Jim Miller Rd
10		6302 N Jim Miller Rd
11		8507 Bellingham Dr
12		8505 Bellingham Dr
13		2806 Lindbergh Dr
14		3107 Dorrington Dr
15		8332 Van Pelt Dr
16		8410 Van Pelt Dr
17		6124 N Jim Miller Rd

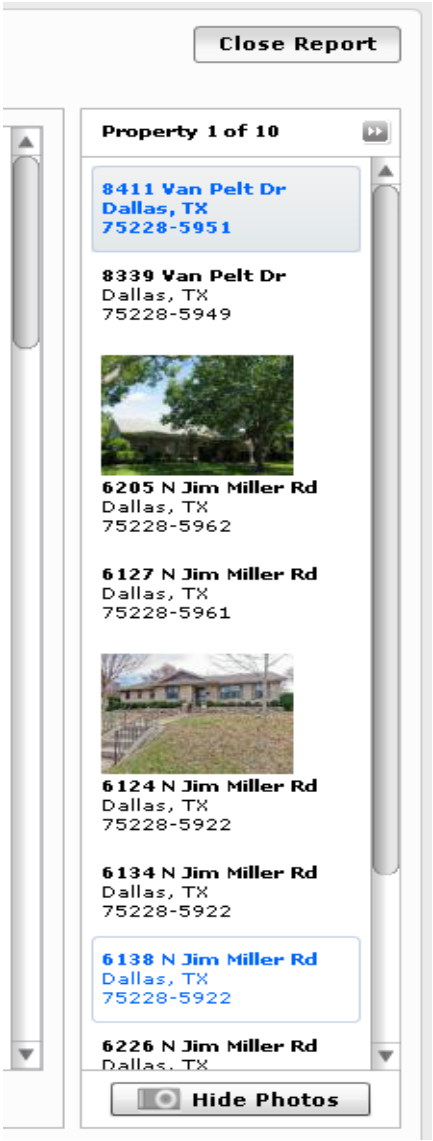
Green = Active
Red = Sold
Yellow = Pending
Purple = Expired

Viewing Reports

If you wish to view one report on your list, double click the address and a full report will appear.
If you need to view all the records in a full report format, select View Reports found at the bottom of the search results page.



When viewing a full property report, notice what appears on the right side of the screen? It is a list of the other properties from your search results. To view another record, simply click on the information.



If you wish to close the full report, click Close Report found on the top of this side menu.

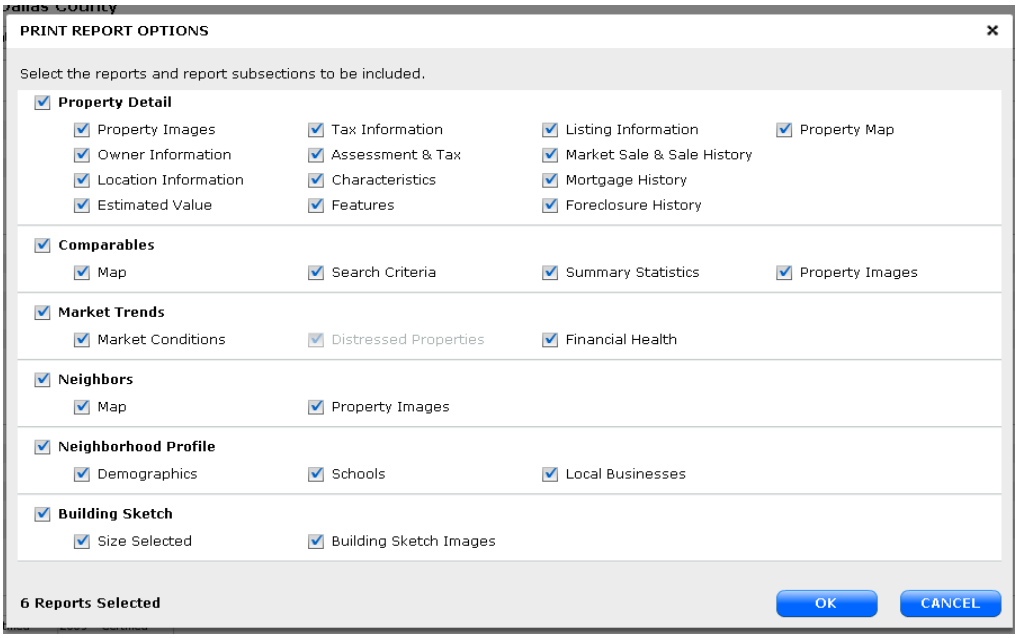
If you wish to hide the photos, simply click Hide Photos found on the bottom of this menu.

Printing

Printing while viewing a detailed report

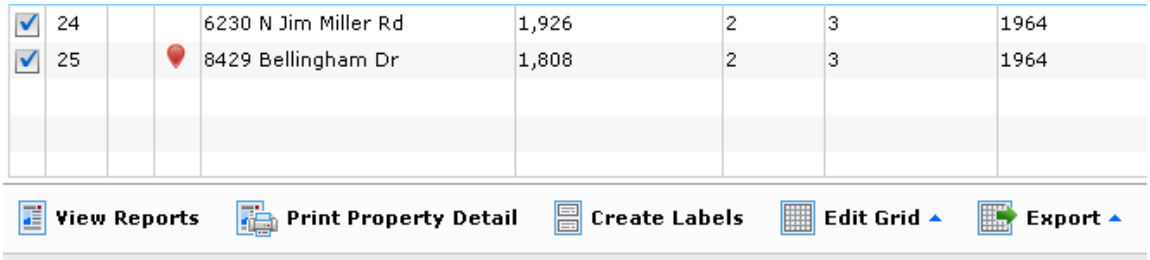
If while viewing a property record and you wish to print it, select Print found on the bottom right hand side of the screen. ***Note: You may only print 25 records at a time.***

When you select Print, you will have the option to select Quick or Customize. The Quick report will print all information about the property. If you select Customize you will receive a screen that will alow you to select what information you wish to have printed.



Printing from the search results grid

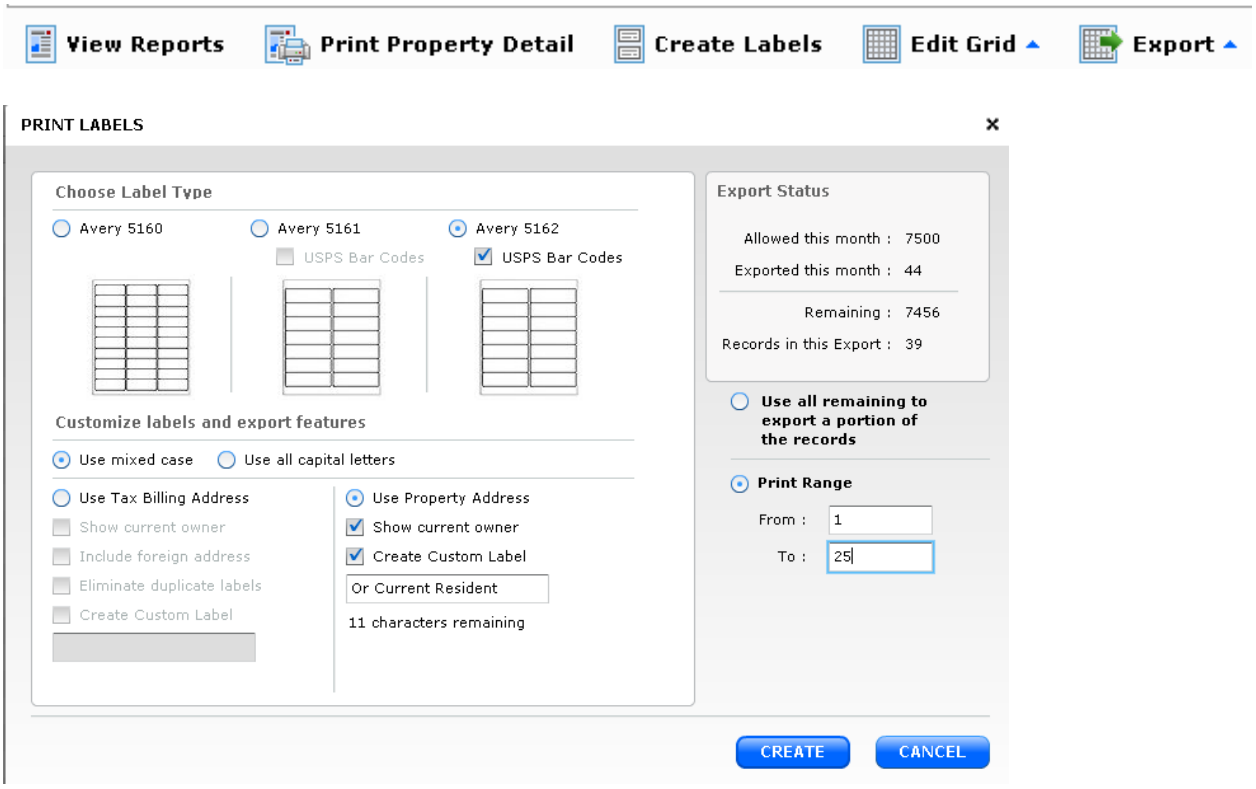
On the search results page you may print any records you have selected.



Select Print Property Detail. A PDF view page will appear. Select the printer icon in the upper left hand corner of the screen to print the record(s).

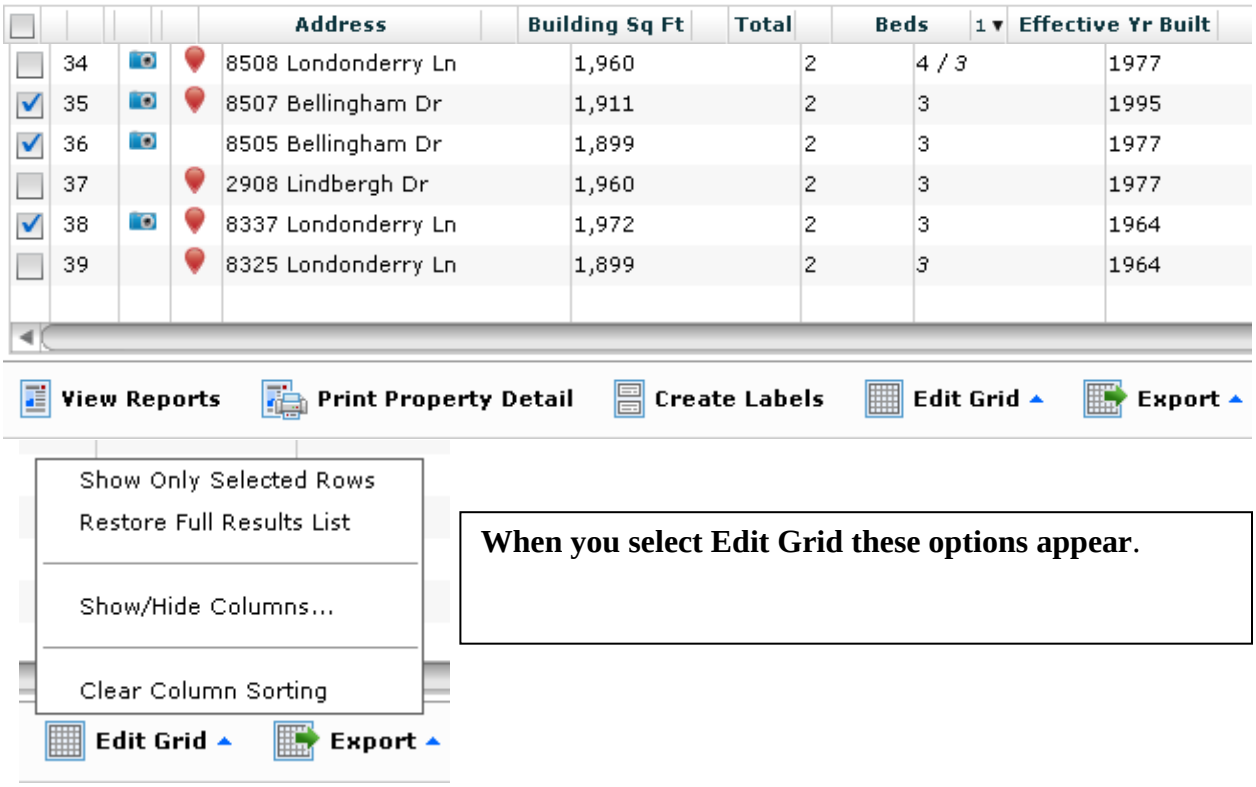
Creating Labels

To create mailing labels select Create Labels



- **Select the type of Avery label you will be using.**
- **Select whether you'd like to use Mixed Case or All Capital Letters on the labels.**
- **Select whether to use the Tax Billing address or the Property Address.**
- **Select Create Custom Label to add a custom greeting such as: Current Resident**
- **Review your Export Status to ensure you will have enough remaining exports to cover the labels. If not, you can use up your remaining exports. Click the "Use All Remaining To Export A Portion Of The Records" check box.**
- **Select Print Range if you would like to create labels for a subset of your search results . Enter the starting row number and the ending row number (range) to include these in the labels.**
- **Click Print. Next, click Open. You may now print the labels. Be sure to save these so you can use them again for another mailing!**

Edit Grid

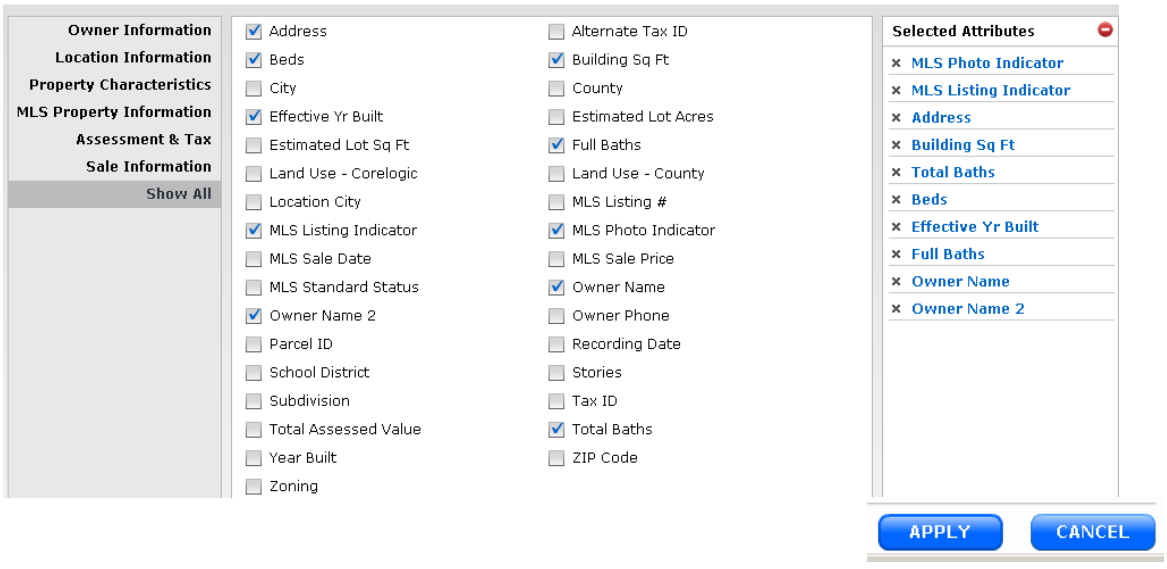


When you select Edit Grid these options appear.

Show Only Selected Rows – When you select this option all the rows that are not selected/checked will be removed.

Restore Full Results List – When this is selected all the rows you have previously removed will be put back on the screen.

Show/Hide Columns – This option will allow you to design your own one line view. Select the items you wish then click Apply found in the lower right hand corner.



Clear Column Sorting – If you have sorted a column this will restore it back to the previous sort.

Export

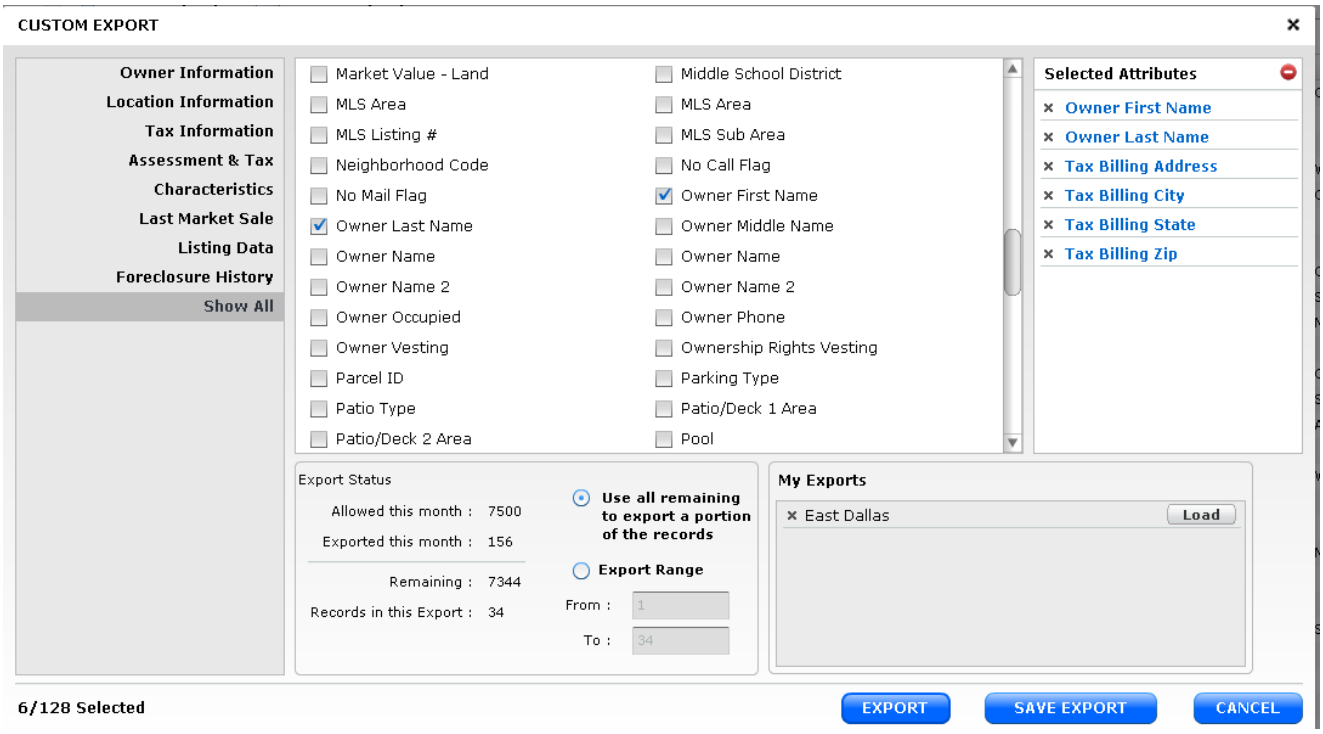
If you need to export your property data, you can perform an export of the grid, or a custom export containing additional information, to a CSV file that can be viewed in Microsoft Excel.

Select the records you would like to export. If you have a long list of search results, click the check box at the top of the column to clear all selections, and then select only the properties you want to export.

Click the Export option at the bottom of the Search Results Grid and select one of the following options:

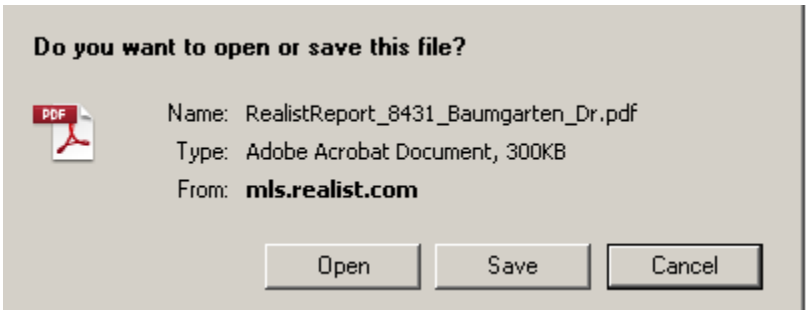
Grid - Select this option to export the information that currently appears on the Search Results Grid. You will be able to remove items, but not add new ones

Customize - Select this option to export additional information. You will be able to choose from the full list of search field attributes. Selected fields will be saved automatically for the next time you want to export records. The Grid Export or Custom Export window opens.



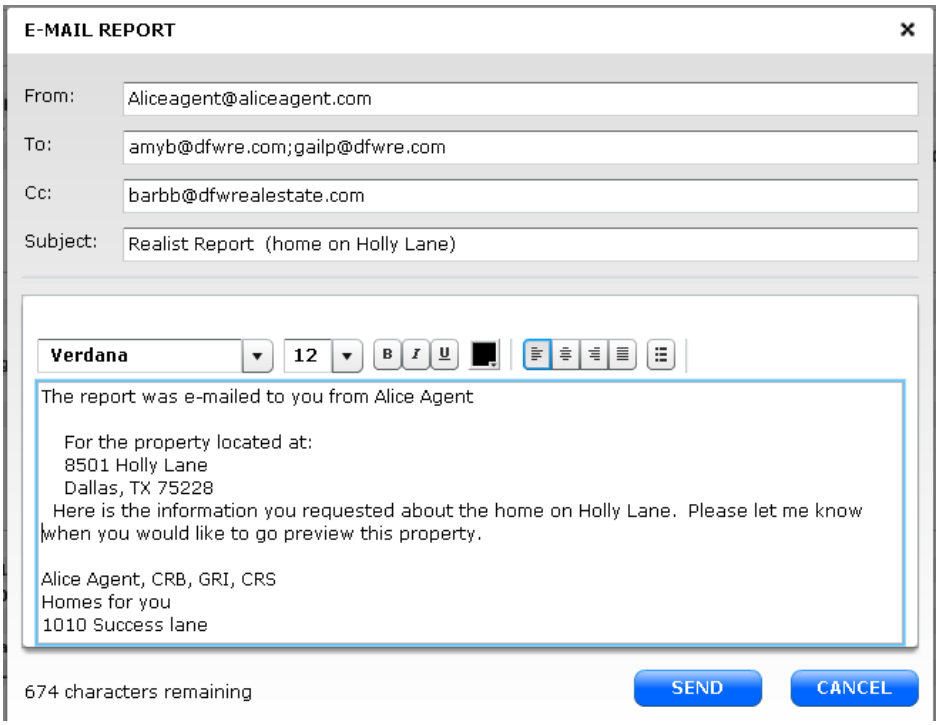
Saving

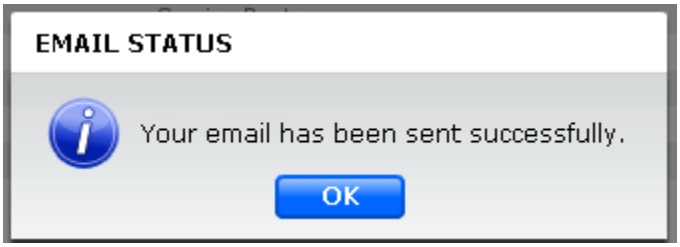
To save the record you are viewing, click Save, then select Quick or Customize. On the next screen you either select Open so you may view the record then save it, or you may click Save to save it without viewing first.



E-Mailing

To E-mail a report select Email. You then may choose Quick or Customize. To enter in more than one Email address, they must be separated by a semi-colon (;). Be sure to copy yourself.



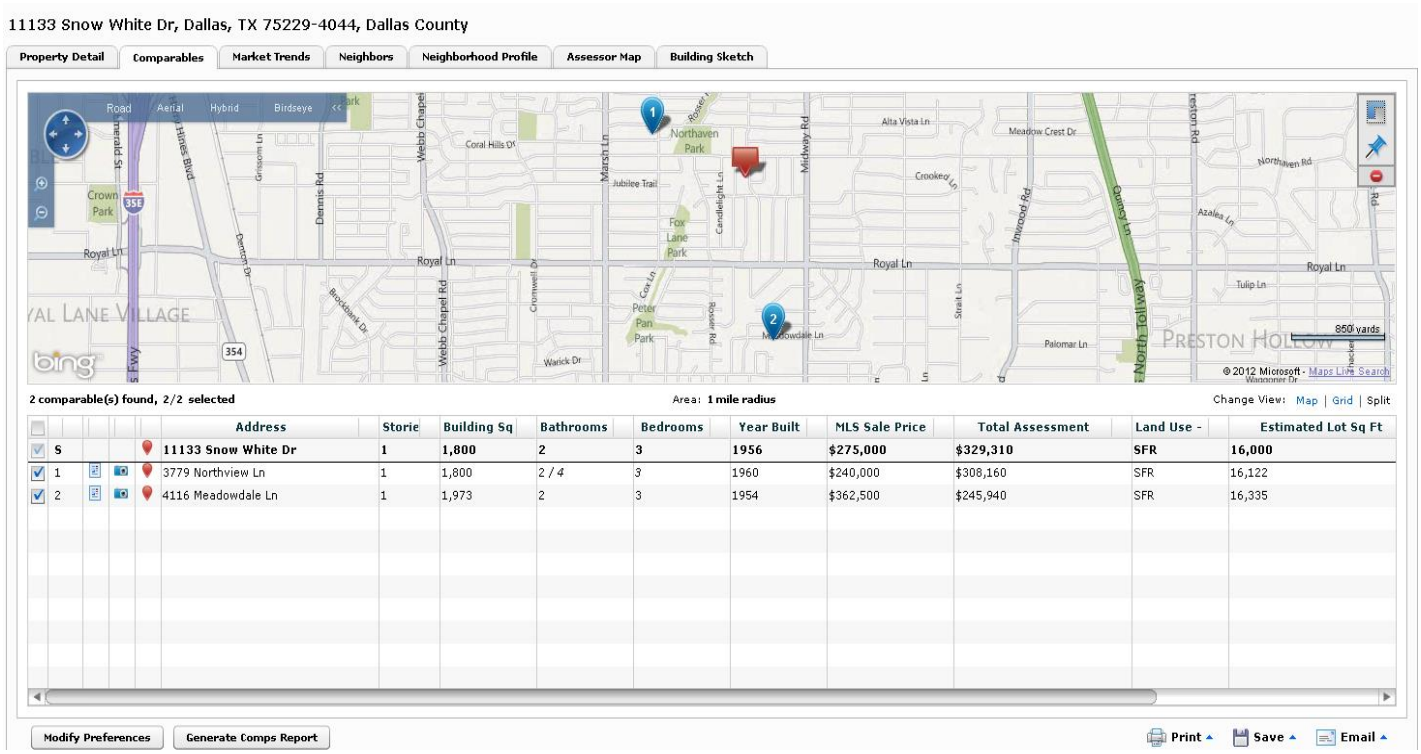


Options on a Full Report

Comparables

When viewing a Full Report, you have six options in which to choose.

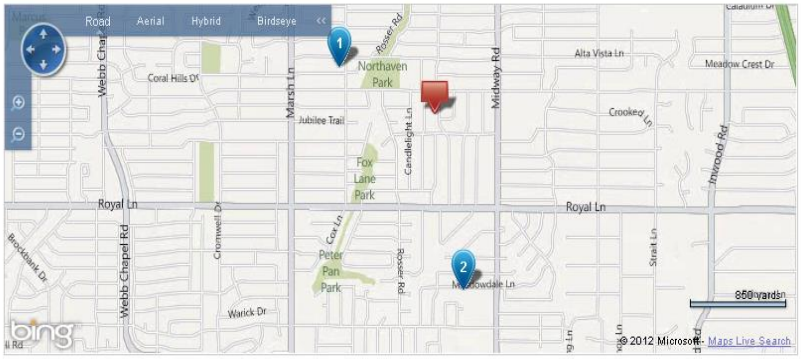
Comparables – select this to find other properties that are similar to the property you are viewing. For this report, you can even toggle between Map views of the comparable properties, finding the one that best presents the information you want to communicate in your report.



You can click Modify Preferences to change the criteria that were used to run the initial report and regenerate new output.

Generate Comps Report will produce a report with the following information:

Report Geographic Area: **1 mile radius**



Search Criteria

Number of Comparables:	**20**
Sort Method:	**DISTANCE**
Distance from Subject:	**1**
Months Back:	**12**
% Different:	**10%**
Land Use - County:	**SAME_AS_SUBJECT**

Summary Statistics

	Subject Property	High	Low	Median	Average
Building Sq Ft	1,800	1,973	1,800	1,886	1,886
Bedrooms	3	3	3	3	3
Stories	1	1	1	1	1
Year Built	1956	1960	1954	1957	1957
Distance (miles)		0.75	0.53	0.64	0.64

Details Grid

	Subject Property	Comparable 1	Comparable 2
Photo	Photo not available		
Address	11133 Snow White Dr	3779 Northview Ln	4116 Meadowdale Ln
MLS Sale Date	08/21/2003	12/27/2011	07/14/2011
MLS Sale Price	$275,000	$240,000	$362,500
MLS Listing #	9672399	11660509	11611458
Recording Date	06/09/2008	01/03/2012	07/18/2011
Sales Date	06/04/2008 / *08/21/2003*	12/22/2011 / *12/27/2011*	07/12/2011 / *07/14/2011*
Bedrooms	3	*3*	3
Bathrooms (Total)	2	2 / *4*	2
Bathrooms (Full)	2	2 / *4*	2
Stories	1	1	1
Building Sq Ft	1,800	1,800	1,973

Market Trends

The Market Trends report presents a visual perspective on current market trends for the location of and surrounding areas for the current property. The report provides a mix of tax and MLS data if you are part of an MLS that provides this type of data. The report provides data on trends to help you determine where the market has been in a particular geographical region. The report displays graphs on Market Conditions, Distressed Properties, and Financial Health

Neighbors

The Neighbors report lets you find all the neighbors located within a specified radius of a property. This report can be provided to prospective owners who would like to see who their neighbors are going to be. Neighbor searches are also an ideal way to prepare mailing lists for just-listed and just-sold cards. The Neighbors report gives basic details about properties near the subject property. Search parameters are defined by the preferences set by the user, including whether to limit results to properties on the subject property's street

Neighborhood Profile

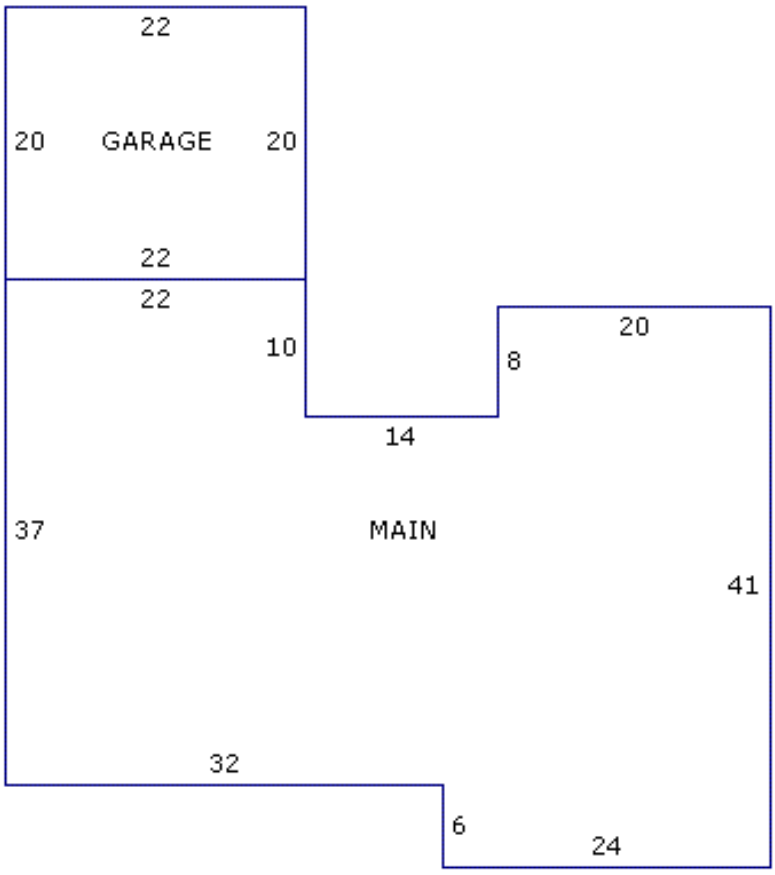
This report provides you with an in-depth look at the neighborhood of the property, including the people (population), the housing statistics, quality of life information, schools, and other areas of interest. The Neighborhood report includes three major sections – Demographics, Schools, and Local Businesses. Each section uses a different geographical area as a basis for the search parameters. This report is intended to be used as a local area report – focusing on a mile area. If you select a larger area, the amount of information the report will return can become overwhelming. For example, if you search for local businesses in a five mile area of an urban area, you will get hundreds of results displaying

Assessor Map

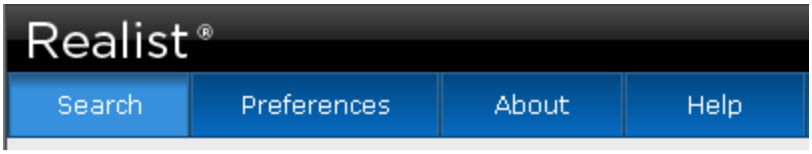
If there are Assessor Maps associated with the property, an Assessor Map tab appears in the Report Window. The available sheets of the Map appear on the page.

Building Sketch

You will see a sketch of the home.



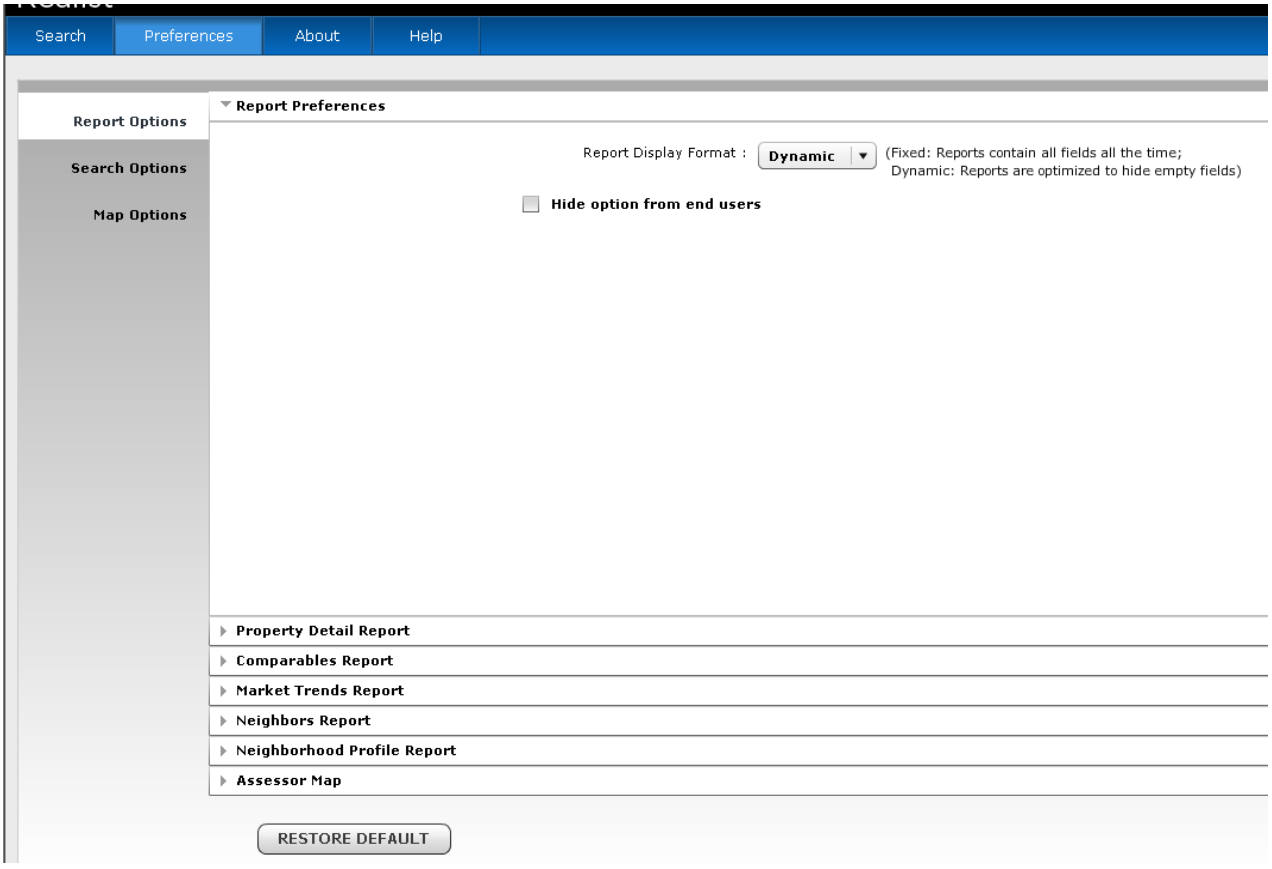
The Menu



Setting User Preferences

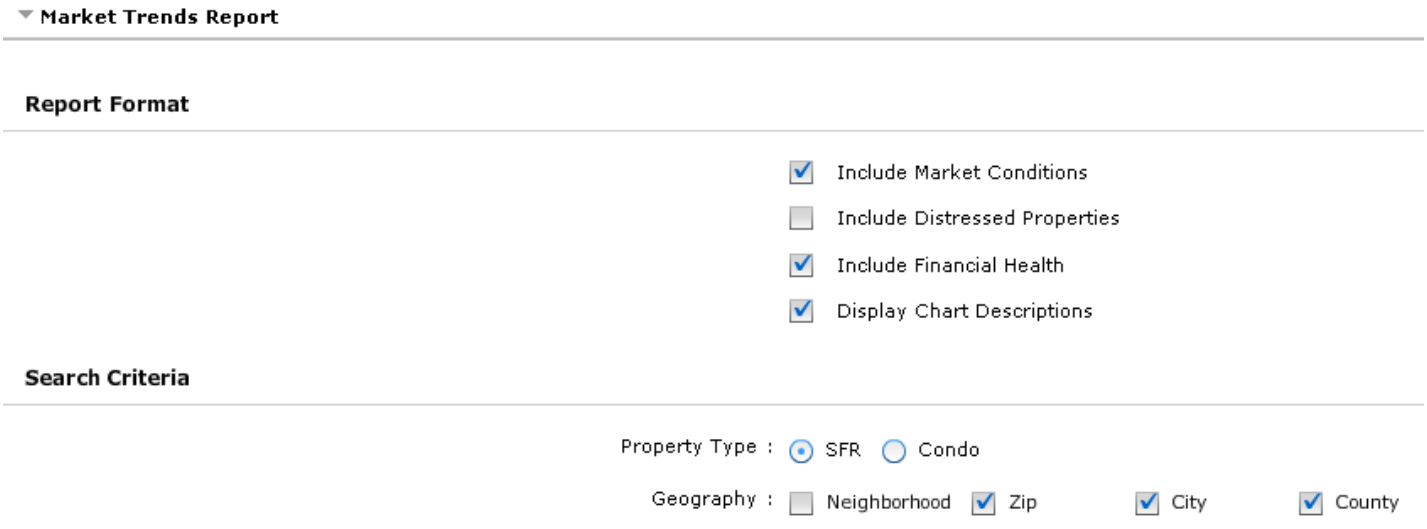
The User Preferences page provides options for configuring personal settings for your Realist views. You can configure reports, search options, and Map options.

Report Preferences

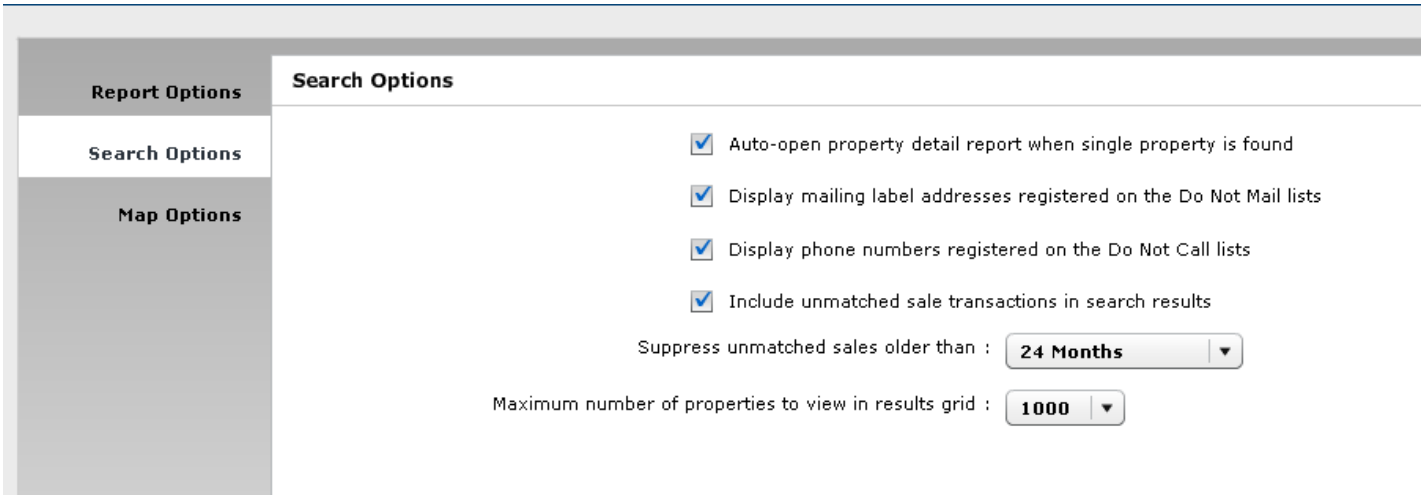


On the "Report Preferences" screen select the report name to expand the options.

Below is an example of the options on the "Market Trends" Report.



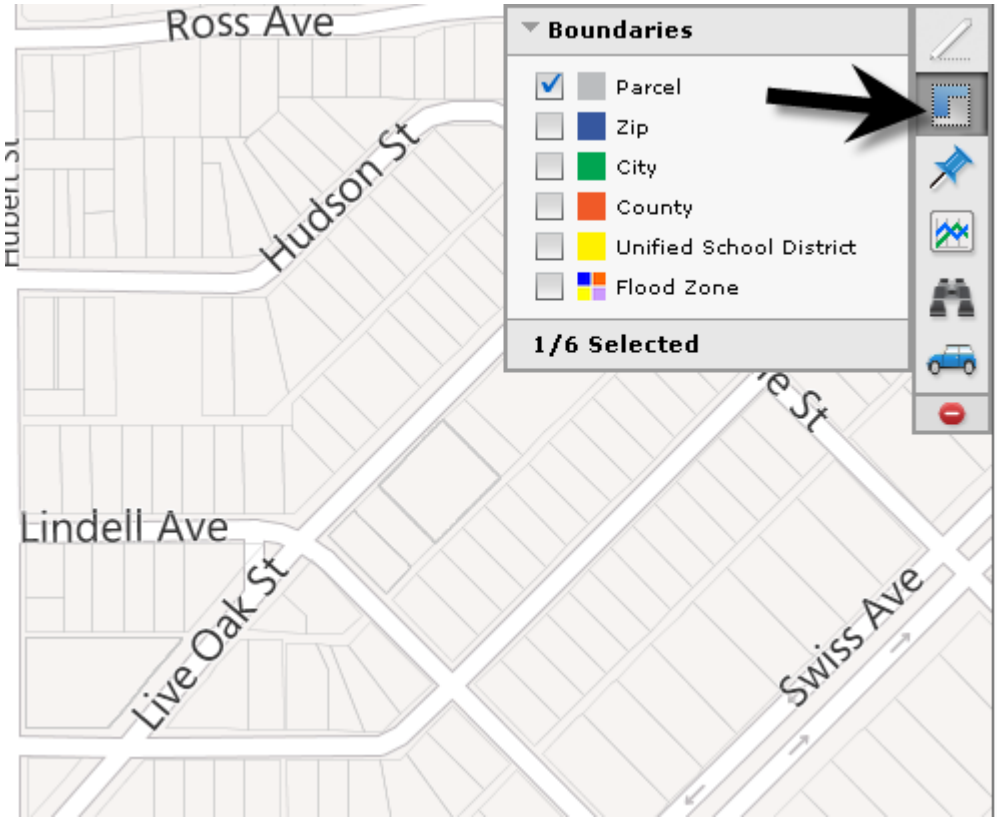
Search Options



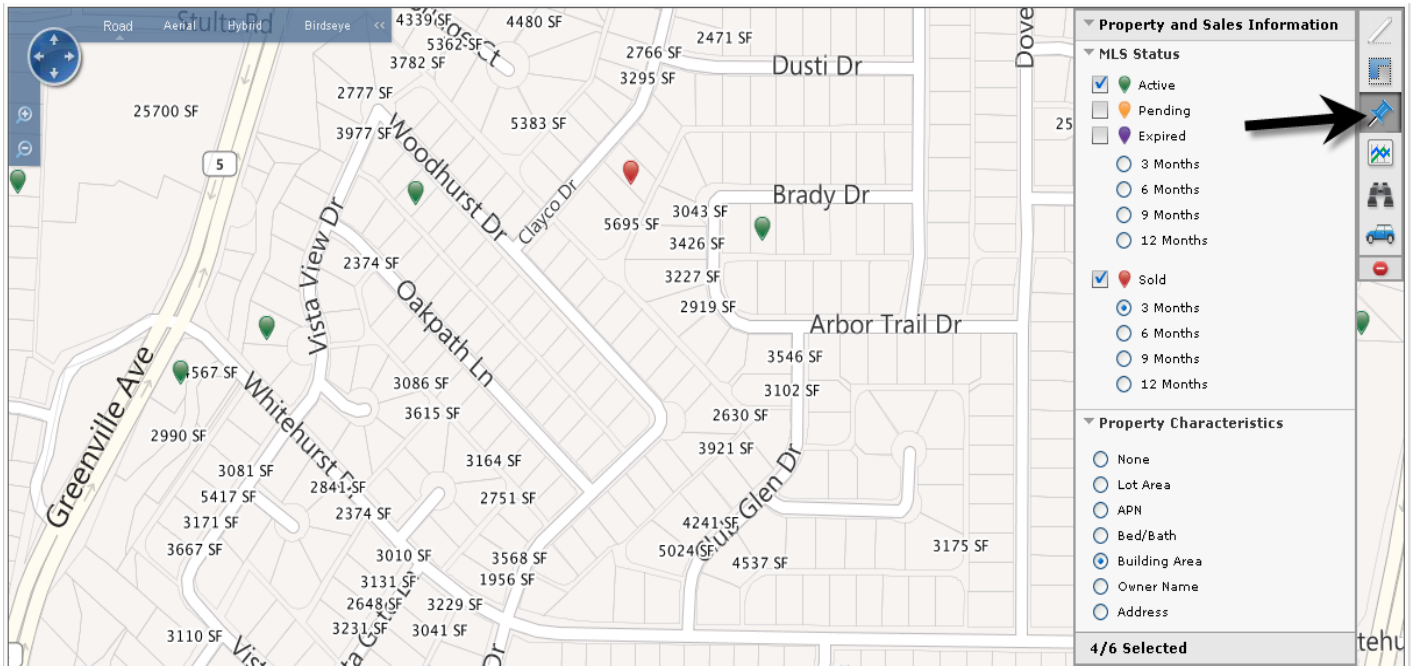
The "Include unmatched sale transactions in search results" means:
Some sales, such as those for newly formed properties, cannot be matched to properties. Select this option to limit which unmatched sales transactions are returned in search results by within the last 6, 12, 18, or 24 months.

Map Options

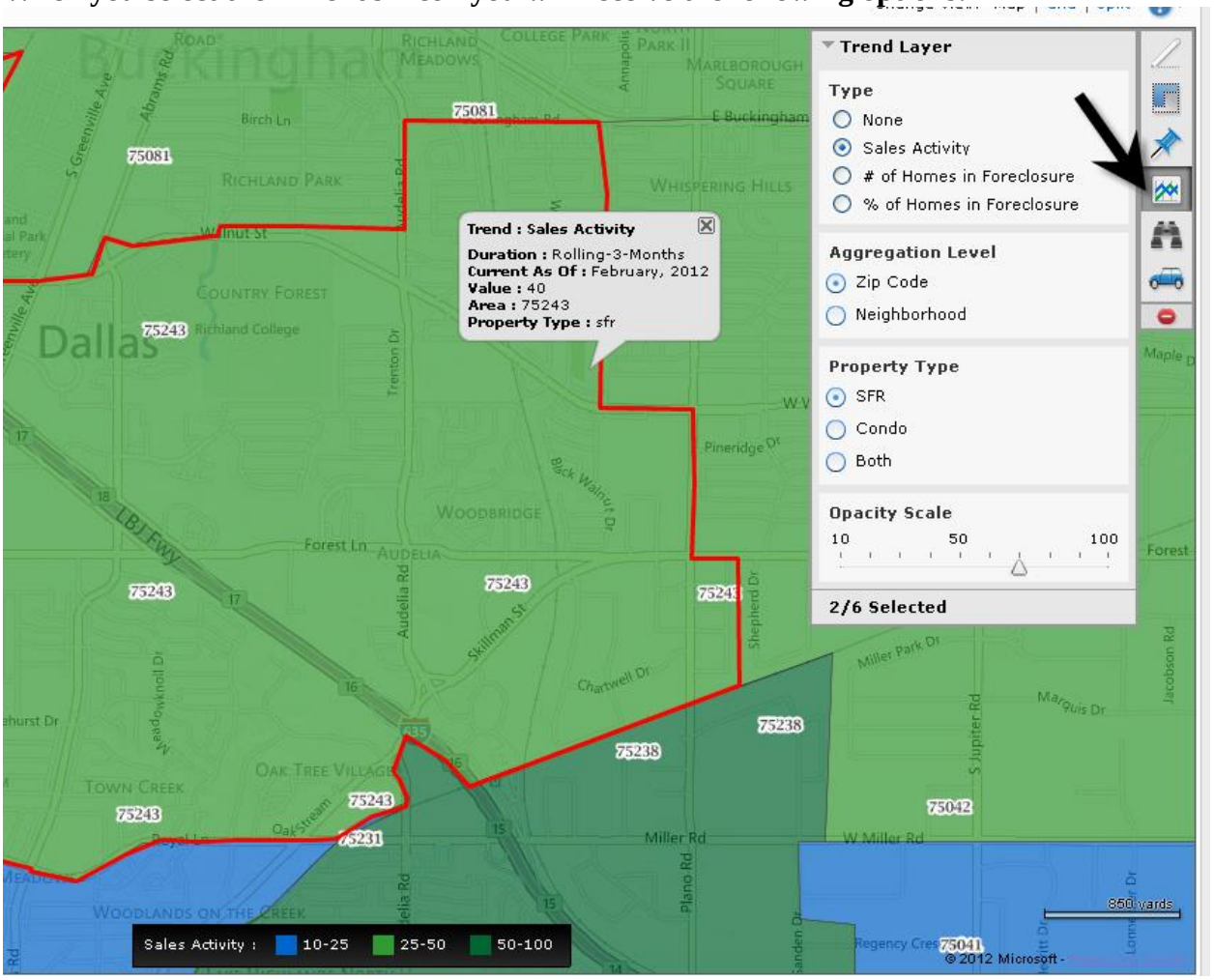
If you select the "Boundaries" icon you receive the following:



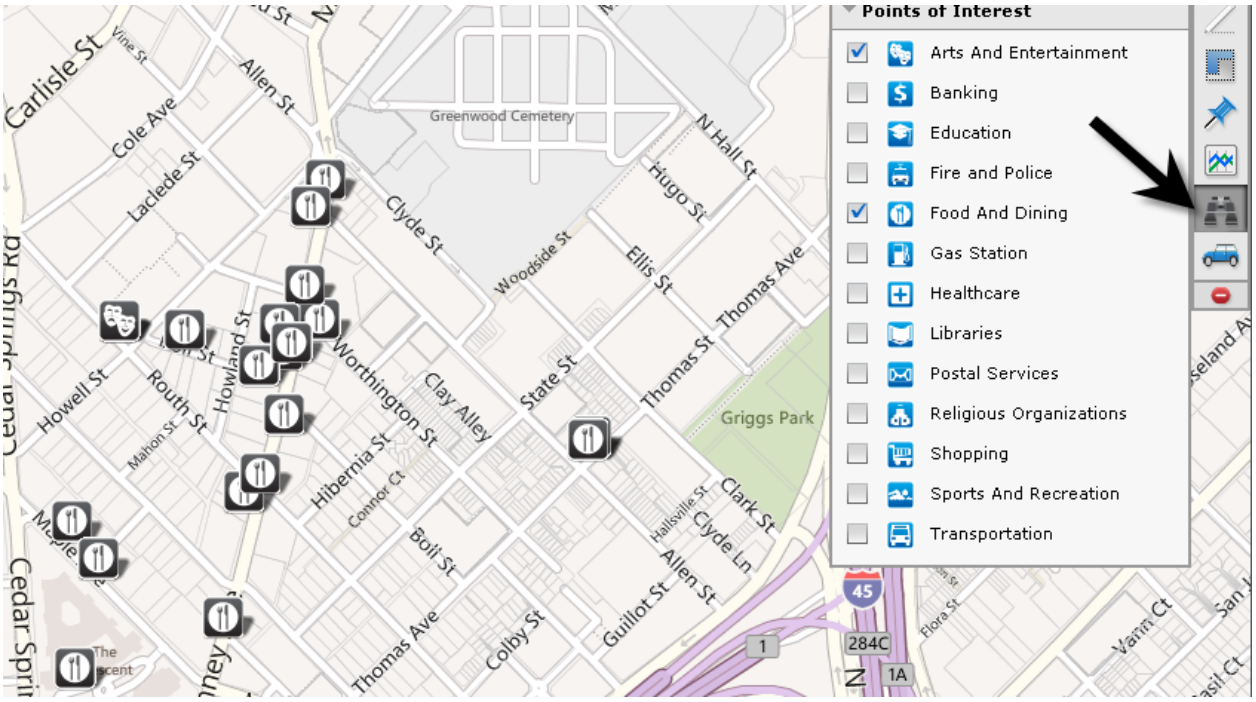
When you select the "Pin" (Property and Sales Information) icon you see the following:



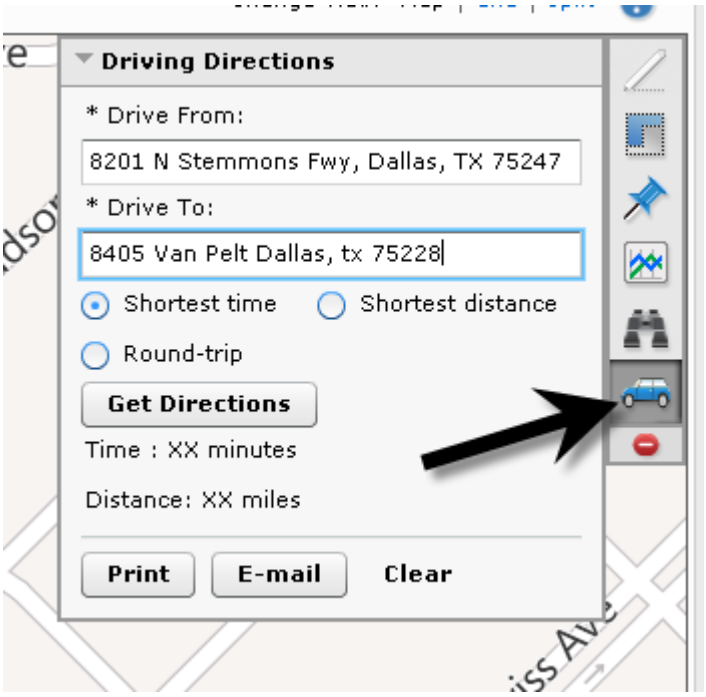
When you select the "Trends" icon you will receive the following options:

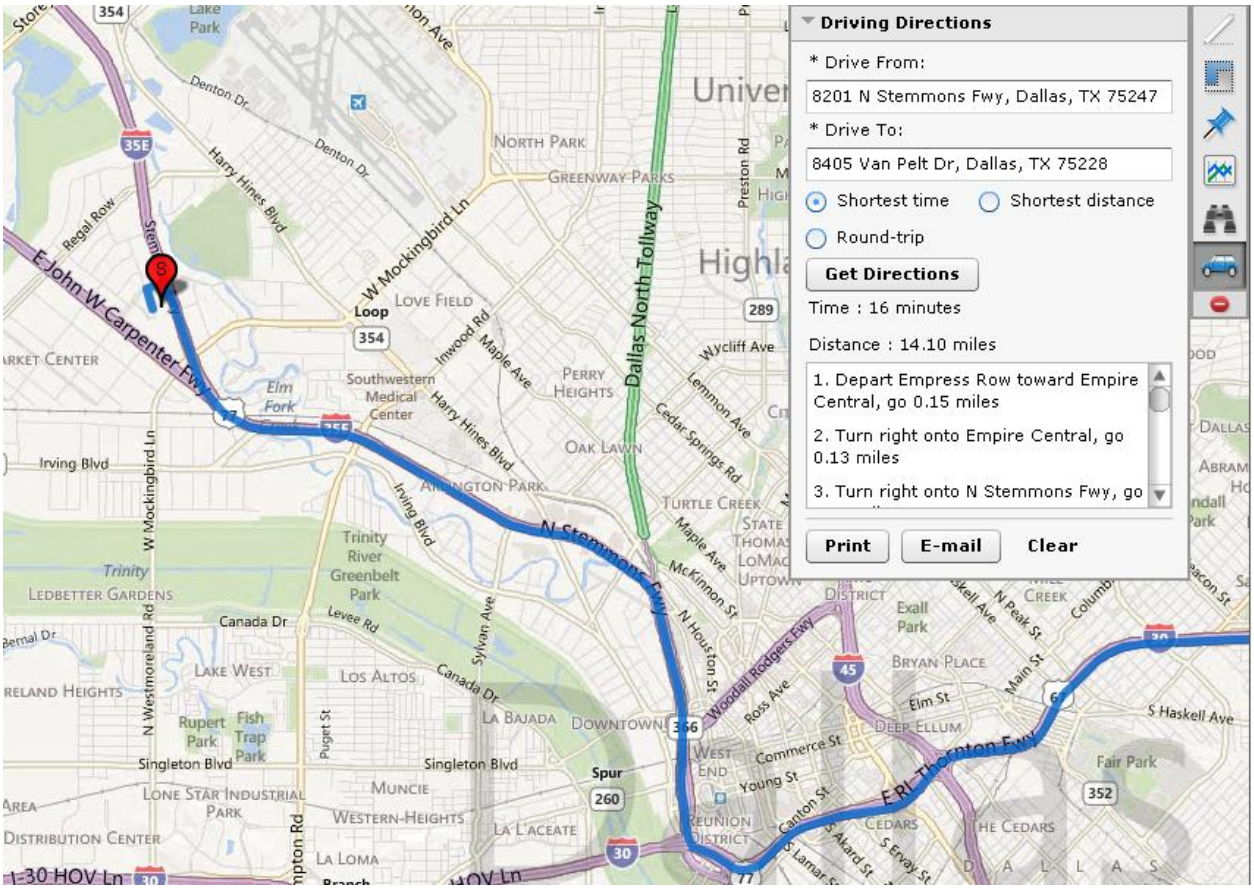


When you select the “points of Interest” icon you receive the following:



When you select the “Driving Direction: icon you get the following:




Driving Directions
* Drive From:
8201 N Stemmons Fwy, Dallas, TX 75247
* Drive To:
8405 Van Pelt Dr, Dallas, TX 75228
Shortest time
Shortest distance
Round-trip
Get Directions
Time : 16 minutes
Distance : 14.10 miles
1. Depart Empress Row toward Empire Central, go 0.15 miles
2. Turn right onto Empire Central, go 0.13 miles
3. Turn right onto N Stemmons Fwy, go
Print
E-mail
Clear
E John W Carpenter Fwy
N Stemmons Fwy
Dallas North Tollway
E R L Thornton Fwy
Woodall Rodgers Fwy
W Mockingbird Ln
Harry Hines Blvd
Denton Dr
Regal Row
Irving Blvd
Canada Dr
Singleton Blvd
Spur
Loop
Lake Park
North Park
Greenway Parks
Love Field
Southwestern Medical Center
Perry Heights
Oak Lawn
Arlington Park
Turtle Creek
Trinity River Greenbelt Park
Ledbetter Gardens
Lake West
Los Altos
La Bajada
Downtown
West End
Reunion District
Deep Ellum
Bryan Place
Exall Park
Fair Park
Muncie
Western Heights
La L'aceate
La Loma
Lone Star Industrial Park
Distribution Center
Rupert Park
Fish Trap Park
Trinity
Elm Fork
Preston Rd
Wycliff Ave
Lemmon Ave
Cedar Springs Rd
Maple Ave
Inwood Rd
Sylvan Ave
Levee Rd
Puget St
N Westmoreland Rd
N Houston St
McKinnon St
Ross Ave
Commerce St
Young St
Canton St
Elm St
Main St
S Haskell Ave
N Peak St
Columbia
Beacon St
Cedars
The Cedars
Dallas
I-30 HOV Ln