

## Who Uses ProspectFinder?

ProspectFinder assists a wide variety of industries including:

- Mortgage Lenders
- Title Insurers
- Investors
- Small Business

## Shortcut to ProspectFinder

1. Go to [www.dataquick.com](http://www.dataquick.com).
2. Click **ProspectFinder** in the **Product Log In** list.
3. Type your user ID and password in the corresponding fields.
4. Click **Log In**.

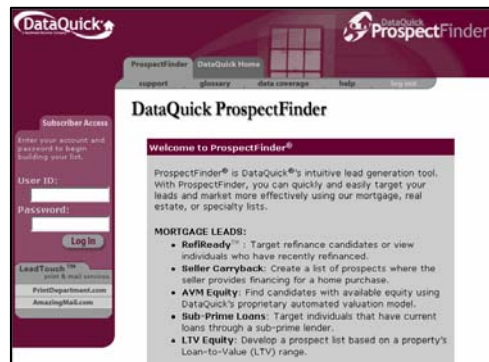
## Welcome to DataQuick ProspectFinder®

ProspectFinder is DataQuick's intuitive, Internet-driven lead generation tool that empowers you to locate refinance candidates, new homeowners, home equity targets, and more. To get started, follow the steps below. See the details on the pages that follow.

- A. Log On to ProspectFinder (page 1)
- B. Select a Marketing List (page 2)
- C. Specify Search Geography (page 3)
- D. Select Use Codes (page 3)
- E. Filter Search (page 4)
- F. Select Lenders (page 7)
- G. Confirm Search Results (page 7)
- H. Select Output Options and Confirm Order (page 8)
- I. Download List (page 9)

### A. Log On to ProspectFinder

1. Go to <http://prospectfinder.dataquick.com/>
2. From the Welcome window, type your user ID and password in the corresponding fields.



Welcome window

3. Click **Log In**.

## Need Additional Help?

ProspectFinder includes an easy-to-use online help system

1. Click **Help** in the upper right corner of ProspectFinder.
2. Click **Show** to view a table of contents.
3. Click the topic of choice.
4. Click **File** and **Close** to close the window.

## Looking for X-Dates?

If you're looking for X-dates (the date homeowners insurance is set to expire) please use ProspectFinder FARM.

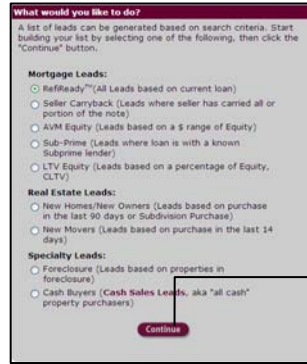
ProspectFinder FARM includes easy to use tools and output options designed to help you with your X-date marketing campaign.

## Need Additional Search Tips?

For tips for running higher filtered searches, contact your Account Manager, Sales Rep, or our Customer Call Center and ask for our Mastering ProspectFinder Tips and Tricks Guide.

## B. Select a Marketing List

1. Click the list you want to generate (see description below).
2. Click **Continue**.



**What would you like to do?**  
A list of leads can be generated based on search criteria. Start building your list by selecting one of the following, then click the "Continue" button.

**Mortgage Leads:**

- RefiReady™ (All Leads based on current loan)
- Seller Carryback (Leads where seller has carried all or portion of the note)
- AVM Equity (Leads based on a \$ range of Equity)
- Sub-Prime (Leads where loan is with a known Subprime lender)
- LTV Equity (Leads based on a percentage of Equity, CLTV)

**Real Estate Leads:**

- New Homes/New Owners (Leads based on purchase in the last 90 days or Subdivision Purchase)
- New Movers (Leads based on purchase in the last 14 days)

**Specialty Leads:**

- Foreclosure (Leads based on properties in foreclosure)
- Cash Buyers (Cash Sales Leads, aka "all cash" property purchasers)

**Continue**

Select a List

Click Continue

## List Descriptions

- **RefiReady:** Target refinance candidates and/or home equity candidates. Target owners of properties who have not refinanced in the amount of time specified or target owners who have recently refinanced.
- **Seller Carryback:** Target notes where the seller is carrying all or a portion of the financing.
- **AVM Equity:** Target candidates with available equity using DataQuick's propriety Automated Valuation Model (AVM).
- **Sub-Prime Loans:** Target owners that have current loans through a sub-prime lender. Recommended for marketing refinance for second mortgage (home equity) loans to consumers with less than perfect credit.
- **LTV Equity:** Target home equity prospects by defining levels of home equity through a Loan To Value range.
- **New Homes/New Owners:** Target new home owners that have moved in the selected geography during the last 90 days.
- **New Movers:** Target new homeowners with new homes and/or resales during the past 14 days (from the last date of county recorder update). This premium list is recommended for insurance companies, personal service providers, and small businesses.
- **Foreclosures:** Locate properties in active foreclosure. (Please see Getting Started with ProspectFinder: Foreclosures).
- **Cash Buyers:** Cash Buyers are individuals that have purchased property without a mortgage loan. These are also known as Cash Sales Leads or "all cash" transactions.

### Search Geography Tips

#### Search by County

You can specify up to 25 counties. The counties do not need to be in the same state.

#### Search by City

You can specify up to 10 cities.

#### Search by ZIP Code

You can specify up to 25 ZIP Codes. They do not need to be in the same state.

#### Statewide Search

You can specify up to five states.

#### Nationwide Search

Choose this option if you want to include all available states. A search this broad may take additional time to process.

### Use Code Selection

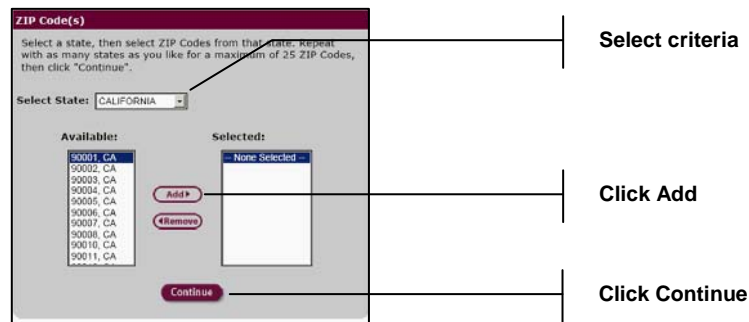
- Click **Add All Commercial** to add all commercial use codes.
- Click **Add All Residential** to add all residential use codes.
- Click **Add** for individual use codes.
- Click **Remove** or **Remove All** to remove individual use codes

### Multiple Selections

1. Hold down the **CTRL** key and click each selection in the **Available** field.
2. Click **Add**.

## C. Specify Search Geography

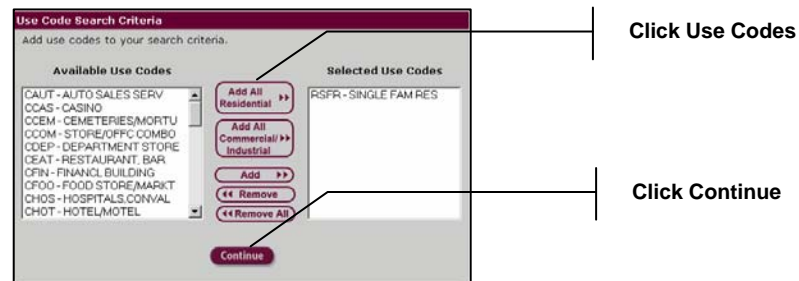
1. Click a search geography type and click **Continue**.
2. Select a state in the **Select State** list.
3. Click your search criteria in the **Available** list. Use the scroll bar to browse through the available search criteria.  
**Note:** The available search criteria varies (State, ZIP Code, etc.) depending on the search geography you selected.
4. Click **Add** for each selection.
5. Click **Continue** when you have completed your geographic selections.



## D. Select Use Codes

Select use codes to help pinpoint the types of properties you're searching for.

1. Click one of the following:
  - **Add All Residential:** Search by all residential use codes.
  - **Add All Commercial/Industrial:** Search by all commercial use codes (does not include Agricultural, Vacant Land, or Miscellaneous use codes).
2. Click **Continue**.



### Search Filter Tips

Use the tips below to find targeted leads that match your marketing campaign.

#### Home Equity Candidates

First Loan filters can help you find candidates for home equity loans.

1. Enter the Loan Date range and the Loan Amount range in the First Loan filters.
2. Select one or all of the following:

**Conventional:**  
Regular loan

**FHA:** Government Loan

**VA:** Government Veterans Loan

**Fixed:** Look for higher rates for the prospect of offering lower rates

**Variable:** Rates that change over time.

#### Home Equity or Second Purchase Loans

Second Loan filters help you find Second Purchase loans or those with Home Equity Loans. Options include:

- **Include All Records:** All records with or without Second loans
- **Exclude Records with Seconds:** Only get records with first loans

### E. Filter Search

Filter your search to find target leads that match your marketing campaign. After you complete all your filter selections, click **Continue** at the bottom of the Search Criteria page. All filters are optional.

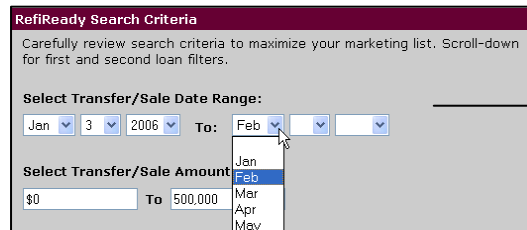
**Note:** Available filters vary depending on the marketing list you selected.

- Select Sale Date and Sale Amount (page 4)
- Select Ethnic Surnames (page 4)
- Select Occupancy Status, Refinance Status, and Phone Options (page 5)
- Select First Loan Filters (page 5)
- Select Second Loan Filters (page 6)

#### Select Sale Date and Sale Amount

You can filter your searches to sales made in a year, month, and day range and by sale amount.

1. Select the date range in the **Select Transfer/Sale Date Range** field.
2. Type a transfer/sale amount range in the **Select Transfer/Sale Amount Range** fields.

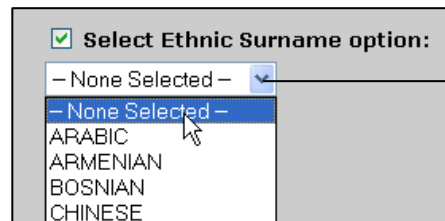


Select sale date and amount range

#### Select Ethnic Surnames

You can filter your searches to match a specified ethnicity.

1. Select the **Ethnic Surname option** check box.
2. Select an ethnic surname in the list.



Select an ethnic surname

## More Search Filter Tips

### Jumbo Loans

You can search for Jumbo Loans (loans that fall outside conforming loan guidelines).

1. Determine a loan date range.
2. Review the Conforming Loan limit for the selected date range. (Conforming Loan charts can be requested from your account manager or sales representative).
3. Type the loan date range in **the First Loan Date Range** filter.
4. Type the Conforming Loan limit in the low limit of the **Specify Loan Amount Range** filter.

### Search for Loans by Interest Rate

Market to owners with high interest rates.

1. Determine a loan date range.
2. Review interest rates for the desired period (Interest rates charts can be requested from your account manager or sales representative).
3. Type the interest rate range in the **Estimated Interest Rate Range** fields.

## Select Occupancy Status, Refinance Status, and Phone Options

Locate targeted leads by occupancy status and refinance status.

1. Select one of the following under **Occupancy Status**:
  - **Owner Occupied**: Owner lives on the property.
  - **Absentee Owner**: Owner does not live on the property (possible investment property)
  - **Both**: All properties
2. Select one of the following under **Refinance Status**:
  - **Only Records that Have refinanced**
  - **Only Records that Have Not refinanced**
  - **Include All records**
3. Select one of the following under **Phones**:
  - **Only Records that HAVE a phone number** (best for telemarketing campaigns)
  - **Only Records that DO NOT HAVE a phone number**
  - **Include ALL records**

## Select First Loan Filters

First Loan filters help you target leads based on the purchase loan or a refinance loan.

1. Select the loan date range under **Select Loan Date Range**.
2. Type the loan amount range in the **Specify Loan Amount Range** fields.
3. Select any or none of the following check boxes under **Specify Loan Type**:
  - **Conventional**: Include loans not insured by FHA or VA.
  - **FHA**: Include loans insured by the Federal Housing Administration.
  - **VA**: Include long term, low payment or no-down payment loans guaranteed by the Department of Veterans Affairs.
4. Select any or none of the following check boxes under **Choose Interest Rate Type**:
  - **Fixed**: Loans with interest rates that stay the same for the lifetime of the loan
  - **Variable**: Loans with interest rates that adjust based on the pre-selected index
5. Click **Select Estimated Interest Rate Range** and type a range in the **Estimated Interest Rate Range** fields.

**Note:** The Estimated Interest Rate Range search is based on a National Interest Rate average from January 1995 forward and is only applicable to 1st position loans. The range limit is 1% to 25%.

## More Search Filter Tips

### Search for Owners who have not Refinanced

1. Select **Refi-Ready** list.
2. Select First Loan filters: **Date Range, Loan Amount Range, Estimated Interest Rates** (if applicable).
3. Click **Exclude Records with Seconds** in the Second Loan Filter.

### Market to Owners with 80/20 Loans

1. Select **LTV Equity** list.
2. Type the loan to value range in the **Specify LTV Range** field.
3. Under **First Loan Data**, select the loan amount and loan date range.
4. Select **Use first loan search criteria for seconds** under **Second Loan Data**.

### Market to Owners with a Specified Level of Equity

1. Select **AVM Equity** list.
2. Select estimated level of equity and enter filters accordingly.

### Market to Owners with Sub-Prime Loans

1. Select **Sub-Prime Lender** list.
2. Select Filters as appropriate.

## Select Second Loan Filters

Second Loan filters help you target leads based on home equity loans or second purchase loans (80/20 loans, for example). Modify these criteria only if you are searching by Second Loans.

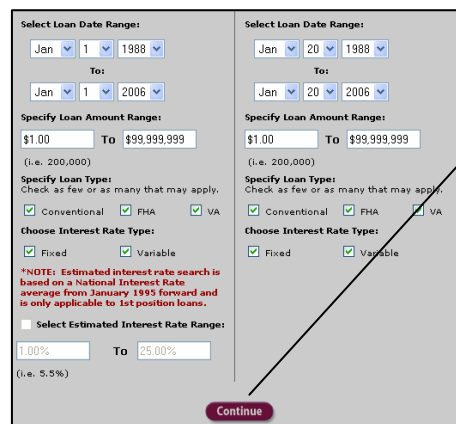
1. Select one of the following:
  - **Include all records, with or without seconds.**
  - **Exclude all records with seconds.**
  - **Use first loan search criteria for seconds:** Filter Second Loan search with criteria entered in the First Loan filter.
  - **Include seconds with the following criteria:** Filter Second Loan search with additional criteria.

**Note:** The additional filters below are only available if **Include seconds with the following criteria** is selected.

2. Select the Second Loan date range under **Loan Date Range**.
3. Select any or none of the following check boxes under **Specify Loan Type**:
  - **Conventional:** Include Second Loans not insured by FHA or VA.
  - **FHA:** Include Second Loans insured by the Federal Housing Administration.
  - **VA:** Include long term, low payment or no-down payment Second Loans guaranteed by the Department of Veterans Affairs.
4. Select any or none of the following check boxes under **Choose Interest Rate Type**:
  - **Fixed:** Loans with interest rates that stay the same for the lifetime of the loan.
  - **Variable:** Loans with interest rates that adjust based on the pre-selected index.

## Complete Loan Filter Selection

1. Complete loan filter selections.
2. Scroll down to the bottom of the page and click **Continue**.



The screenshot shows two side-by-side filter panels. Each panel has a 'Select Loan Date Range' section with dropdowns for month, day, and year. Below that is a 'Specify Loan Amount Range' section with input fields for minimum and maximum values. The 'Specify Loan Type' section contains checkboxes for Conventional, FHA, and VA. The 'Choose Interest Rate Type' section contains checkboxes for Fixed and Variable. A note at the bottom of the panels states: '\*NOTE: Estimated interest rate search is based on a National Interest Rate average from January 1995 forward and is only applicable to 1st position loans.' Below the note is a 'Select Estimated Interest Rate Range' section with input fields for minimum and maximum interest rates. A 'Continue' button is located at the bottom center of the panels.

Click Continue when you selected your filters

### Select Individual Lenders

You limit your search to specific lenders.

1. Click **Select Individual Lenders**.
2. In the Find field, type a lender name (or part of a lender name).
3. Click **Find**. The lender name and all close matches display in the **Available** field.
4. Click the desired lender name in the **Available** field (you can select multiple name by holding down the CTRL key).
5. Click **Add**.
6. Click **Include** to include your selections or click **Exclude** to exclude your selections from the list.
7. Click **Continue**.

### Select Lender Packages

You can limit your search to categories of lenders.

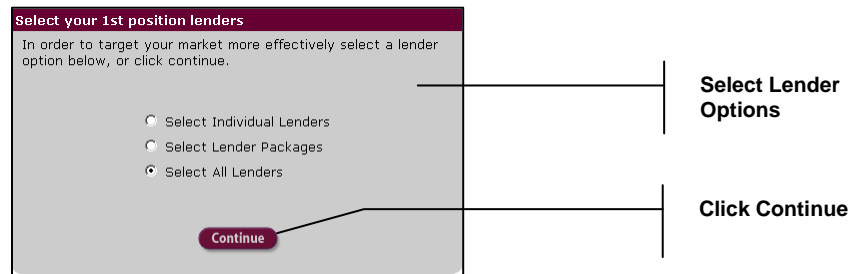
1. Click **Select Lender Packages**.
2. Select the desired lender packages. You can click **Clear All** to clear the selections.
3. Click **Continue**.

## F. Select Lenders

ProspectFinder allows you to limit your search to specific lenders.

**Note:** This feature is only available for RefiReady, AVM Equity, and LTV Equity Lists.

1. Click one of the following:
  - **Select Individual Lenders:** Limit your search to specific lenders (see the panel at the left for details).
  - **Select Lender Packages:** Limit your search to a category of lenders (see the panel at the left for details).
  - **Select All Lenders:** Use all available lenders in your search.

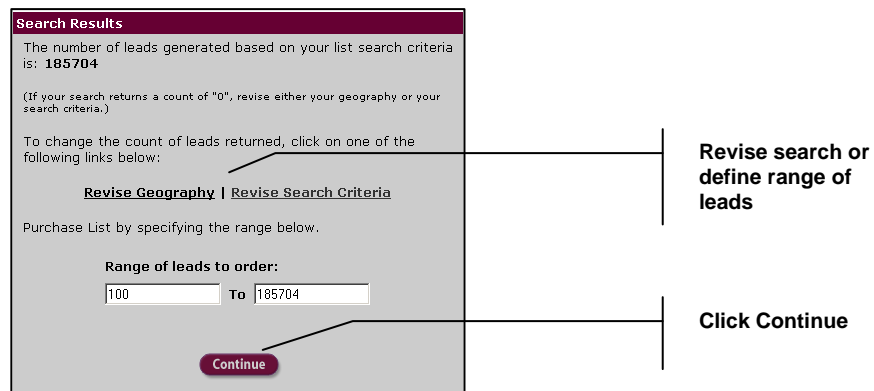


2. Click **Continue**.

## G. Confirm Search Results

The Search Results page allows you to view the number of leads generated in your search. You can reduce the number of leads or revise your search.

1. To narrow your alter your search, click one of the following:
  - **Revise Geography:** Modify your geographic search.
  - **Revise Search Criteria:** Change use codes, search filters, and lenders.
2. To reduce the number of leads returned, type a range of leads in the **Range of leads to order** fields.



3. Click **Continue**.

### Save Search Criteria

You can save your search criteria to generate additional lists. You can save up to 500 searches.

1. When reviewing your search criteria, Click **Save this Search Criteria**.
2. Enter a recognizable name for your file.
3. Click **Submit**. Your search will be saved for use at a later date.

### Use Saved Search Criteria

1. Click **Saved Searches** to view a list of searches.
2. Click the box next to the list you want to use.
3. Change the values in the **Range of Leads to Order** field. (Example: change the range of 1 to 10 to 10 to 20).

### Print Cover Sheet

You can create a cover sheet with a summary for your search results.

1. In the Order Confirmation section, click **Printer Friendly**.
2. Click **File**.
3. Click **Print**.

## H. Select Output Options and Confirm Order

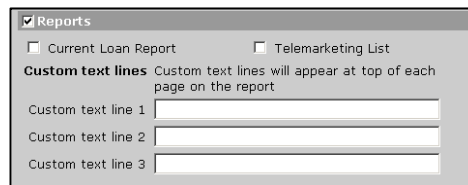
ProspectFinder provides a variety of output options to match your marketing campaign. You can choose from comma delimited files (for use in Excel), mailing labels, or reports.

1. Click one of the following:
  - **Do Not Eliminate Duplicate Records:** Returns all available records even if the owner name displays on multiple properties.
  - **Eliminate Duplicate Records:** Removes any duplicate records where an owner owns multiple properties (this option only returns name, address, and phone number).
2. To generate mailing labels, click **Mailing Labels** and select the following:
  - Select the type of labels in the **Mailing Label Type** list.
  - Click **Mailing Address** to send to homeowners or **Site Address** to send homeowners or residents.
  - Click **Primary & Spouse Owner Names** to include the owner and spouse or **Primary Name** to include the primary owner only.



Select Mailing Label Options

3. To include a printable report, click **Reports** and select the following
  - Click **Current Loan Report** for a simple report with current loan information.
  - Click **Telemarketing List** for a list simple list of names and phone numbers.
  - Type additional text to display at the top of your reports in the **Custom text** fields.



Select Printable Reports

4. To save your search criteria, click **Save this search criteria** (see panel at the left for descriptions).
5. Click **Submit**.
6. Review your order and click **Confirm**.
7. Click **Continue** at the prompt.

**Manage Your Lists**

With ProspectFinder, you can easily manage your lists with these simple options:

**Order Status**

Check the status of your orders at any time.

1. Log on to ProspectFinder.
2. Click **Order Status**. The Order Status window displays.

**List History**

View a history of all lists you generated in the last 30 days.

1. Log on to ProspectFinder.
2. Click **List History**.

**Start a New List**

You can start a new search at anytime.

1. Log on to ProspectFinder.
2. Enter your search criteria and complete your search.

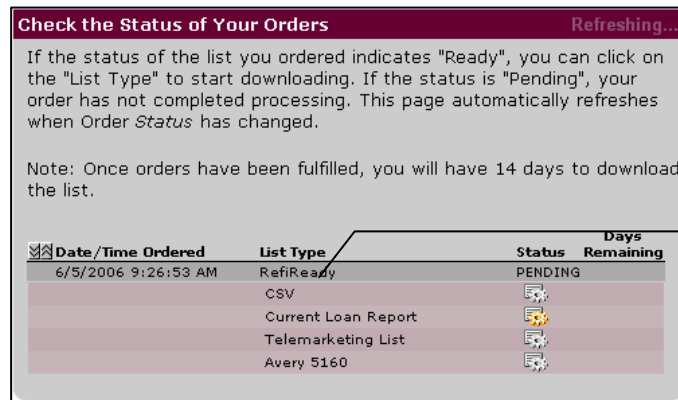
**I. Download List**

When your list is complete, the Status field displays **Ready**.

**Note:** Download instructions may vary depending on your operating system.

1. From the Order Status window, click your list in the **List Type** column.

**Note:** If you generated multiple reports, your reports will be downloaded as one self-executing file. Simply click your list in the List Type column to receive all the reports you selected.



Click your list

2. The File Download dialogue box displays, click **Save**.
3. The Save As dialogue box displays. Click a location in the **Save In** list and click **Save**. The file is downloaded as a Zip file.

**Tip:** To find your list easily, save the file to your desktop.

4. Minimize your ProspectFinder window.



5. Click 470071.exe (the downloaded zip file) on your Desktop.

6. In the Zip Self-Extractor window, click **Continue** to unzip the file.

7. In the next window, click **OK**.

8. When the file is unzipped, click **OK**.

9. Your file now displays on your desktop as a CSV file. You can open this file in Excel.