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.
2. Click **ProspectFinder** in the **Product Log In** list.
3. Type your user ID and password in the corresponding fields.
4. 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.

Welcome to ProspectFinder

ProspectFinder now empowers you to locate refinance candidates using demographic search criteria. Now you can generate searches by age, occupation, marital status, and income. Each demographic search automatically provides you with all four criteria for each recorded returned. To get started, follow the steps below.

A. Log On to ProspectFinder (page 1)

B. Select Demographic List (page 2)

C. Specify Search Geography (page 2)

D. Select Use Codes (page 3)

E. Select List Type (page 3)

F. Select Demographic Criteria (page 4)

G. Filter Search (page 5)

H. Select Lenders (page 8)

I. Confirm Search Results (page 8)

J. Select Output Options and Confirm Order (page 9)

K. Download List (page 10)

A. Log On to ProspectFinder

1. Go to www.dataquick.com
2. Point to **Products and Services**.
3. Point to **Marketing Products** and click **ProspectFinder**.
4. Click **Log In Now!**
5. From the Welcome window, type your user ID and password in the corresponding fields and click **Log In**.

Welcome window

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

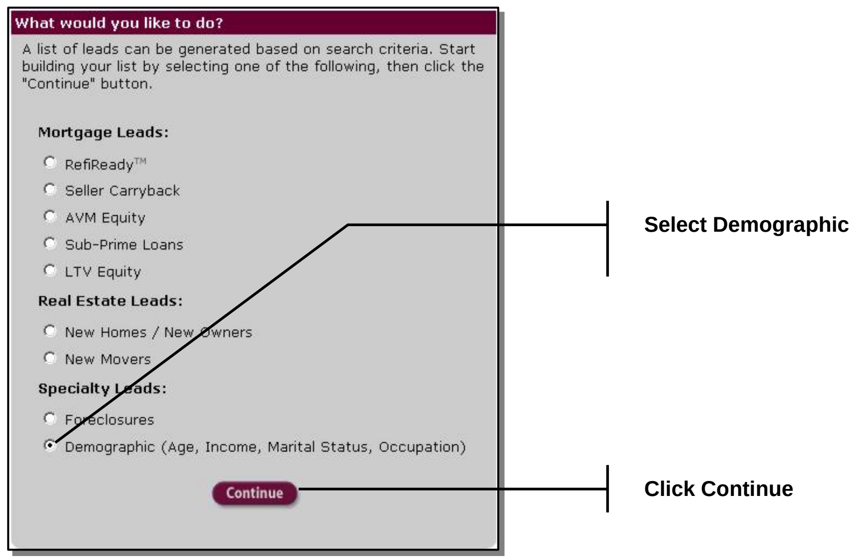
You can specify up to five states.

Nationwide Search

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

B. Select a Demographic List

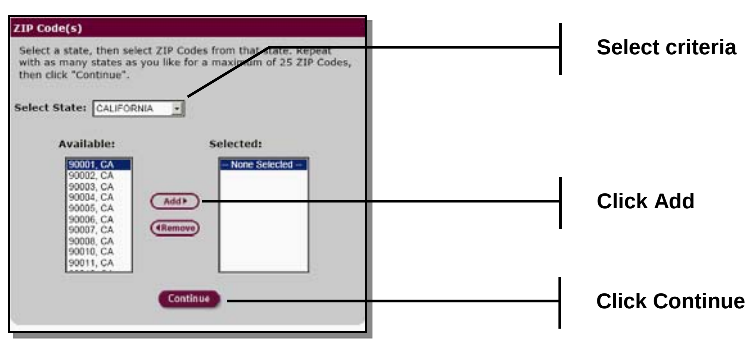
1. Select **Demographic**.
2. Click **Continue**.



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 complete.



Use Code Selection

- 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

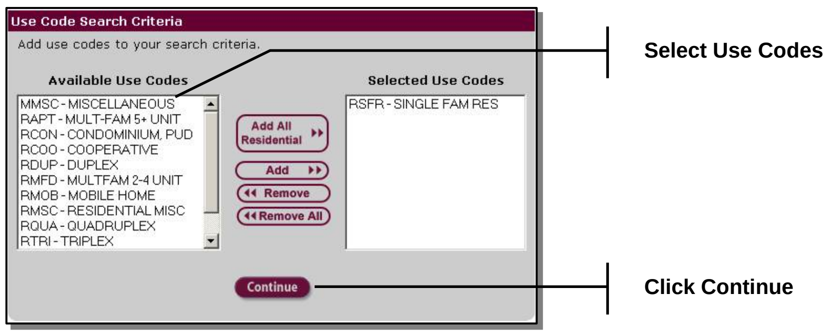
1. Hold down the **CTRL** key and click each selection in the **Available** field.
2. Click **Add**.

D. Select Use Codes

Select Use Codes to help pinpoint the types of properties you're searching for. Commercial Use Codes are not available in the Demographic search.

1. Click the desired Use Code in the Available Use Codes field.
2. Click **Add** for each Use Code.

   Tip: You can add multiple Use Codes by holding down the CTRL key and making your selections.
3. Click **Continue**.



E. Select List Type

Select the type of list you want to generate.

1. Click one of the following:

   - **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.
   - **AVM Equity**: Target candidates with available equity using DataQuick's propriety Automated Valuation Model (AVM). Select Equity levels ranging from $10,000 - $50,000, $50,001 -$100,000, or $100,000 +.
   - **LTV Equity**: Target home equity prospects by defining levels of home equity through a Loan-to-Value range. LTV ranges expressed as percentages.

Multiple Selections

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

Select All Criteria

Each demographic selection allows you to select all available criteria.

1. Click **Add All**.
2. Click **Continue** when complete.

Marital Status Descriptions

- **Married**: Marital status as recorded
- **Single**: Marital status as recorded
- **Inferred Married**: Marital status modeled or self reported
- **Inferred Single**: Marital status modeled or self reported

F. Select Demographic Criteria

Filter your search to specific demographics criteria. Records returned are limited to records that match the demographic criteria you select. However, ProspectFinder returns all for demographics elements (age, occupation, marital status, income) in all report outputs regardless of the filters you selected.

1. Select the check box next to the desired demographic criteria. ProspectFinder expands the selection to expose demographics criteria: Age Selection, Occupation, Marital Status, and Income.

2. Select the desired age ranges, occupations, marital status, and income in the appropriate range list.

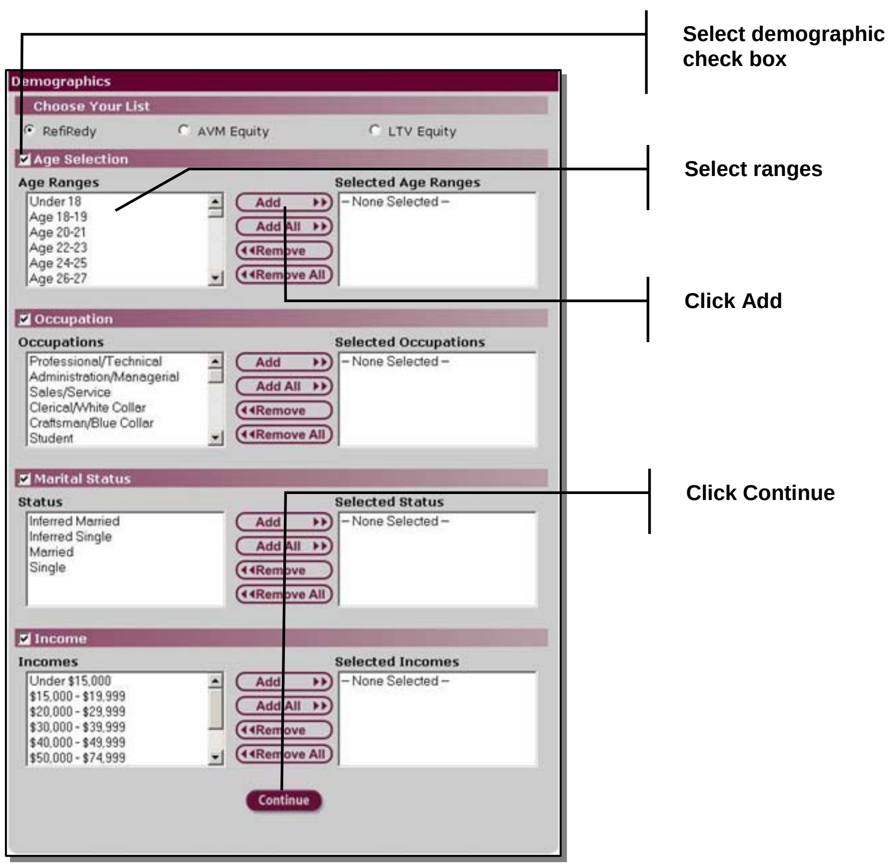
   Tip: You can select multiple selections by holding down the CTRL key and making selections.

3. Click **Add** for each selection.

4. Make additional demographic selections as needed.

   Tip: To remove selections, click the selection in the **Selected Ranges** field and click **Remove** or click **Remove All** to remove all selections.

5. Click **Continue** when complete.



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.

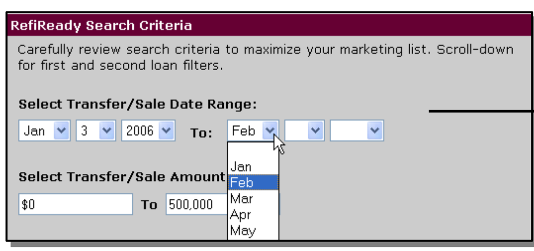
- Select Sale Date and Sale Amount (page 5)
- Select Ethnic Surnames (page 5)
- Select Occupancy Status, Refinance Status, and Phone Options (page 6)
- Select First Loan Filters (page 6)
- Select Second Loan Filters (page 7)

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

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.

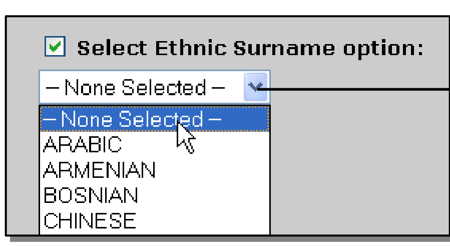


Select sale date and amount range

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. Type the loan date range in **the First Loan Date Range** filter.
3. 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 rage 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

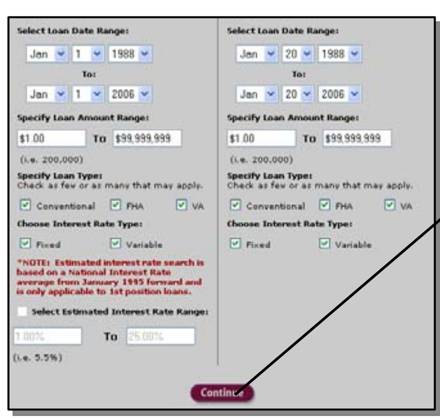
Second Loan filters help you target leads based on home equity loans or second purchase loans (80/20 loans, for example). Modify these criteria only if you are searching by Second Loans.

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**.



Click Continue when you selected your

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

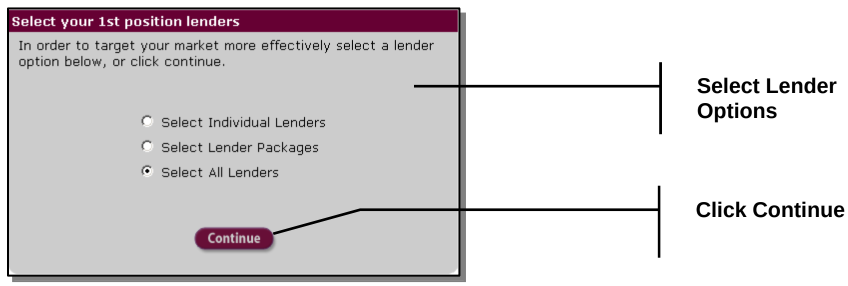
You can limit your search to categories of lenders.

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.

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.

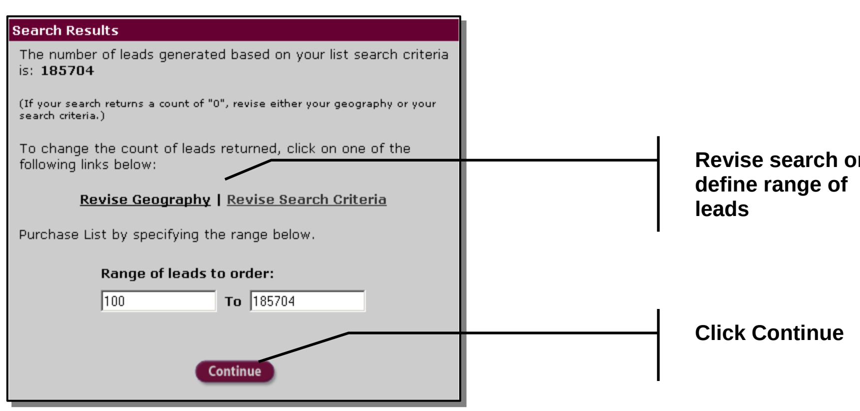


2. Click **Continue**.

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**.

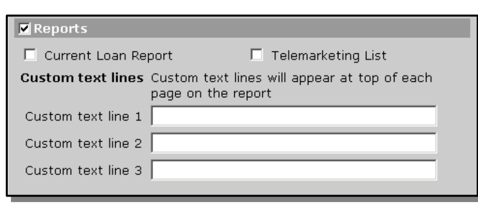
H. Select Output Options and Confirm Order

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.
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.

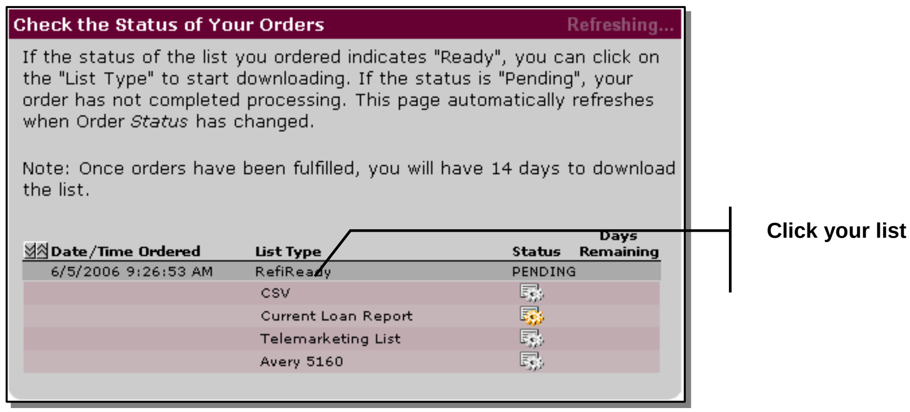
I. Download List

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.



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  (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.