

DataQuick ProspectFinder[®]

Getting Started

Welcome to
DataQuick ProspectFinder



The real estate information expertsSM

Who Uses ProspectFinder?

ProspectFinder was designed to assist a wide variety of industries including:

- Mortgage Lenders
- Title Insurers
- Insurance Professionals
- Home Services Specialists

Shortcut to ProspectFinder

1. Go to www.dataquick.com
2. Click the drop-down arrow under **Product Log In**.
3. Click **ProspectFinder** in the Product **Log In list**.
4. Enter User ID and Password.
5. Click **Log In**.

Welcome to ProspectFinder!

ProspectFinder is DataQuick's premier, Internet-drive lead generation tool that empowers you to market quickly and more effectively. To get started using this powerful tool, 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 Code (Page 4)
- E. Filter Searches (Page 4)
- F. Confirm Leads and Check Order Status (Page 5)
- G. Download List (Page 6)

A. Log On to ProspectFinder

1. Go to www.dataquick.com
2. On the side navigation bar, click **Products and Services**.
3. Click **ProspectFinder**.
4. Click **Log In Now!** The Welcome window displays.



Welcome window

5. Enter your User ID and Password.
6. Click **Log In**.

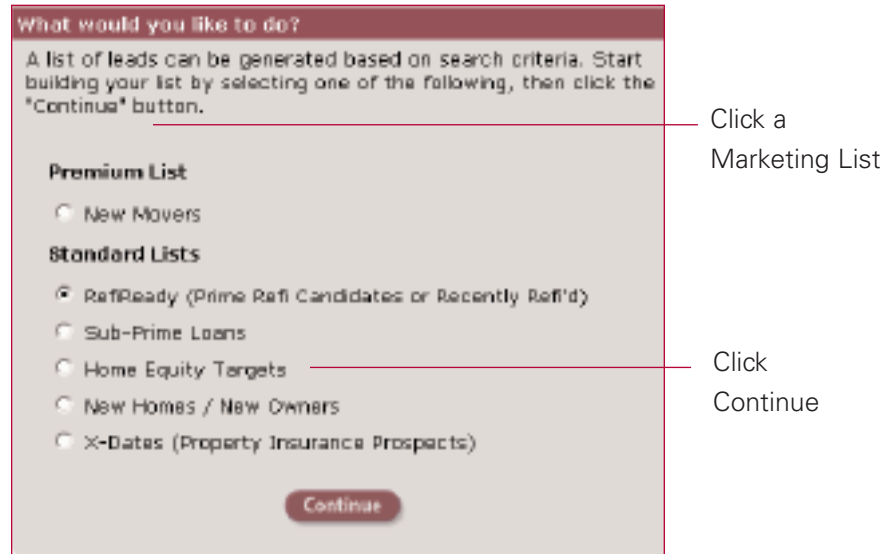
Need Additional Help?

ProspectFinder includes an easy-to-use online help.

1. Click **Help** in the upper right corner.
2. Click **Show** to view additional topics.
3. Click **File** and then **Close** to close the window.

B. Select A Marketing List

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



Marketing List Descriptions:

- **New Movers:** Target new home owners who bought new homes and/or resales during the past 14 days (from the last date of update). This premium list is recommended for insurance companies, personal service providers, and small business.
- **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 mortgages where the seller is carrying all or a portion of the financing.
- **Subprime Loans:** Target owners that have current loans through a subprime lender. Recommended for marketing refinance or second mortgage (home equity) loans to consumers with less than perfect credit.
- **Home Equity Targets:** Market to home equity prospects by defining levels of home equity through a loan-to-value (LTV) range.
- **New Homes/New Owners:** Obtain information about new homeowners that have moved in the selected geography during the last 90 days since the last update.
- **X-Dates:** Identify prospects whose homeowner insurance policies are set to expire on the X-Date. The X-Date is based on the month the owner purchased the property.

Search Geography Tips

Search by County

Choose this option if you know the names of the counties in your search. You can specify up to 25 counties. The counties do not need to be in the same state.

Search by City

Choose this option if you know the names of cities in your search. You can specify up to 10 cities.

Search by ZIP Code

Choose this option if you know the ZIP Codes in your search. You can specify up to 25 ZIP Codes. They do not need to be in the same state.

Statewide Search

Choose this option if you want to include entire states. You can specify up to five states.

Nationwide Search

Choose this option if you want to include all available states.

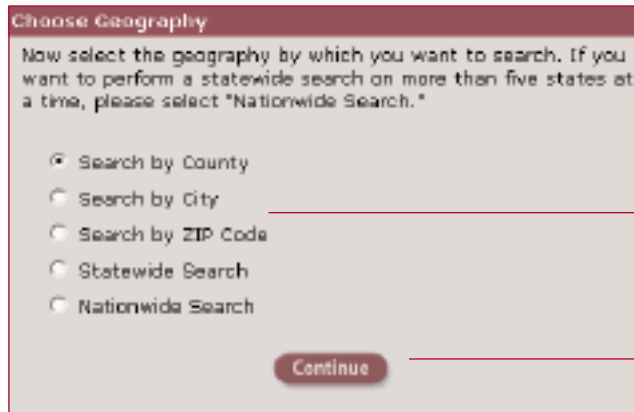
Multiple Selections

To select multiple states or ZIP Codes:

1. Hold down the Ctrl key and click each selection.
2. Click **Add**.

C. Specify Search Geography

1. Click the search geography.
2. Click **Continue**.



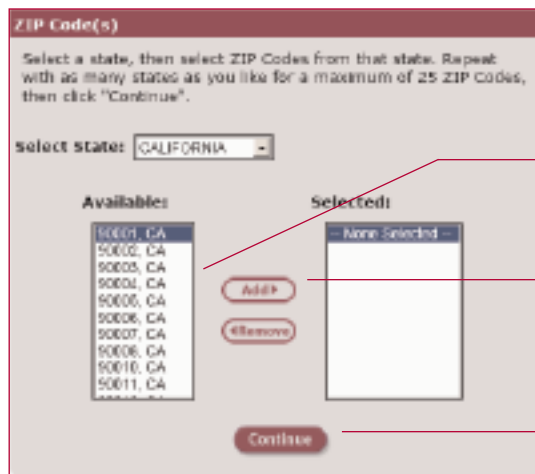
Choose Geography

Click Continue

3. Click your search criteria in the **Available** list. Use the scroll bar to browse through the available search criteria.

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.



Click your selection

Click add

Click Continue

Search Tips

If you are using Home Equity Targets, Subprime Loans, or RefiReady lists, you can use ProspectFinder loan filters to narrow your search.

First Loan Filters

Narrow your search by entering values based on the owners first loan on a property.

Second Loan Filters

Narrow your search by entering values based on any additional mortgages or refinances. Click one of the following Options:

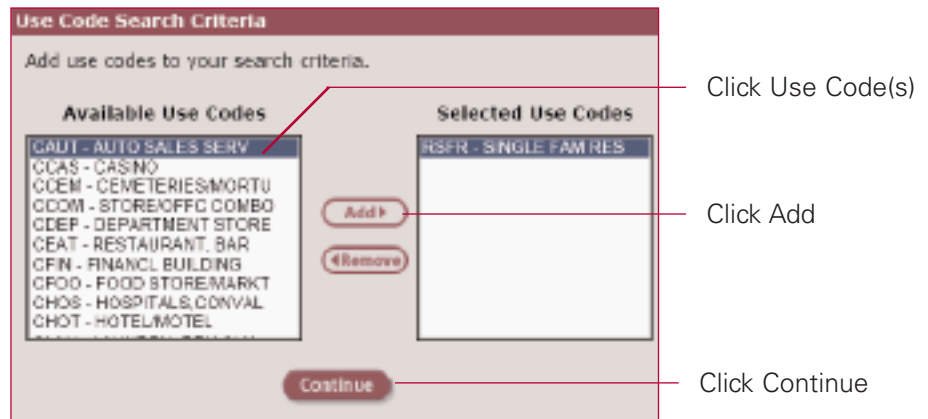
- **Include records, with or without second mortgages.**
- **Exclude records with seconds**
Displays only records with no second mortgages.
- **Use first loan search criteria for seconds**
Displays records where criteria entered for the first loan matches the second loan.
- **Include Seconds With the following criteria**
Displays records with second mortgages based on the criteria you entered.

D. Select Use Codes

Select Use Codes to help pinpoint the types of properties you're searching for.

1. Click use codes in the **Available Use Codes** field.
2. Click **Add** after you select each use code.
3. Click **Continue** when you are completed with your selections.

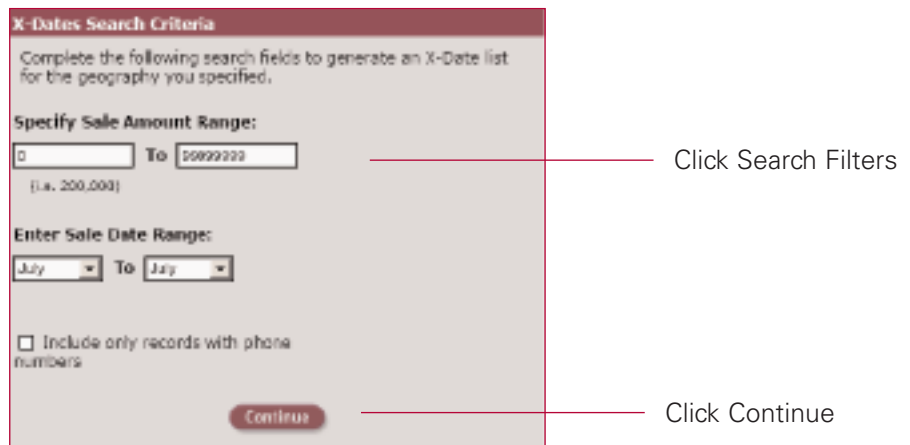
You can remove use codes by clicking the use code in the **Selected Use Code** field and clicking **Remove**.



E. Filter Search

Filter your search to maximize your marketing lists. Available filters vary depending on the marketing list you selected.

1. Enter search filters criteria.
2. Click **Continue**.



Save Search Criteria

You can save your search criteria to generate additional lists.

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 coversheet with a summary for your search results.

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

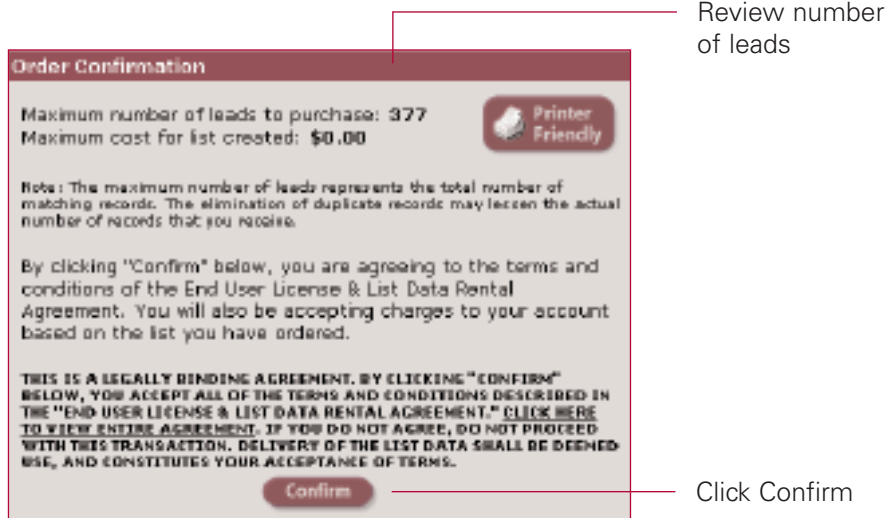
F. Confirm Leads and Check Order Status

ProspectFinder displays the number of leads returned in your search. Your account will not be charged until you have confirmed your purchase.

1. Review the number of leads in the Search Results window.
2. Enter additional criteria to narrow your search (if necessary) and click **Submit**.

You can also save your search criteria. See the panel at the left.

3. Review the number of leads in the Order Confirmation window.
4. Click **Confirm**.



Order Confirmation

Maximum number of leads to purchase: 377
Maximum cost for list created: \$0.00

[Printer Friendly](#)

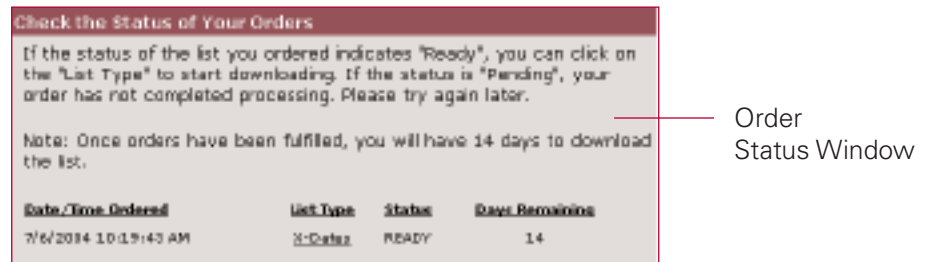
Note: The maximum number of leads represents the total number of matching records. The elimination of duplicate records may lessen the actual number of records that you receive.

By clicking "Confirm" below, you are agreeing to the terms and conditions of the End User License & List Data Rental Agreement. You will also be accepting charges to your account based on the list you have ordered.

THIS IS A LEGALLY BINDING AGREEMENT. BY CLICKING "CONFIRM" BELOW, YOU ACCEPT ALL OF THE TERMS AND CONDITIONS DESCRIBED IN THE "END USER LICENSE & LIST DATA RENTAL AGREEMENT." CLICK HERE TO VIEW ENTIRE AGREEMENT. IF YOU DO NOT AGREE, DO NOT PROCEED WITH THIS TRANSACTION. DELIVERY OF THE LIST DATA SHALL BE DEEMED USE, AND CONSTITUTES YOUR ACCEPTANCE OF TERMS.

[Confirm](#)

5. The Order Status window displays. Click **Continue**.
6. ProspectFinder displays your order status. Click **Refresh Page** to display updated status.



Check the Status of Your Orders

If the status of the list you ordered indicates "Ready", you can click on the "List Type" to start downloading. If the status is "Pending", your order has not completed processing. Please try again later.

Note: Once orders have been fulfilled, you will have 14 days to download the list.

Date/Time Ordered	List Type	Status	Days Remaining
7/6/2014 10:19:43 AM	X-Data	READY	14

Your orders will be stored in ProspectFinder for 14 days.

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.

G. Download List


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

*Download instructions may vary depending on your operating system.

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



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.
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 Exceed 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®