



TRAINING USER MANUAL



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SECTION 1

- **Search Page:** Click the **TAX** link from your NTREIS secured user page. You will be redirected to the Search Page:

There are two means of searching for properties: a basic search and the advanced search. Each one is described below.

- **Basic Search:** Access this tool by clicking either of the links labeled **SEARCH** located on the left portion of the home page or from the NTREIS toolbar located at the upper right hand of the screen.
 - You must first select the county of choice by clicking the drop down arrow and highlighting the county of choice from the list:
 - Notice the update data located to the right of the county selection tool. This will let you know when the county information was last updated.



The screenshot shows a search interface for Tarrant County. At the top left, the text "Tarrant County" is displayed in blue. Below it, there is a label "Choose a County" followed by a dropdown menu currently showing "Tarrant". To the right of the dropdown, there are two lines of text: "Certified Tax Roll Update: 2002" and "Ownership Update from Title Plant: 11/15/2002".

- The basic search allows you to search on the following fields:
 - **Address** - if you know the exact address, enter the address and street.
 - **Address Range** - if you would like to see all properties within a specific range on a street, enter the beginning and ending street numbers and the street name. You may also include pre and post direction data where applicable as well as street designation.
 - **Street Name** - if you would like to see all properties on a specific street, enter the street name only.
 - **PIN** (Property Identification Number) - if you know the exact PIN number, you may enter it here.
***NOTE:** if you are searching in a specific subdivision, some counties group PINs by subdivision, therefore properties within a subdivision will have the first 6-8 characters in common of the PIN. You may also use a partial PIN to obtain more results.*
 - **Owner Name** - if you would like to determine the assets of an individual in the entire county, enter the owner name.
***NOTE:** enter the last name first and then the first initial or first name - NO COMMA.*
 - **Subdivision** - to retrieve properties within an entire subdivision, enter the subdivision name. You may add the Starts With or Contains filter to locate those subdivisions where the name is not in the format you expected. You will first be prompted to select from the list of subdivisions that resemble the name that you entered. Then the search results will appear.

NOTE: if you are not sure of a spelling, just type in the first few letters of the subdivision. All possible matches will be returned for you.

Tarrant County

Choose a County

Certified Tax Roll Update: 2002
Ownership Update from Title Plant: 11/15/2002

Show Advanced Search Features

Street No From - To	Street Pre Dir	Street Name	Street Post Dir	Street Desc
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Parcel ID (PIN)

Owner Name

Subdivision Starts With Contains

Save this search as

SECTION 1—ADVANCED SEARCH

- **Advanced Search:** The Advanced search is accessed by clicking inside the selection box that is located just under the **SEARCH** button:

Show Advanced Search Features

- The Advanced search allows you to search on the following fields:
 - Location:

Location

Street No From - To	Street Pre Dir	Street Name	Street Post Dir	Street Desc
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Street No From - To	Street Pre Dir	Street Name	Street Post Dir	Street Desc
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Street No From - To	Street Pre Dir	Street Name	Street Post Dir	Street Desc
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
City	Zip Code	or Zip Code	or Zip Code	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Map Page	Map Page and Grid	Zone		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
<input type="text"/>	<input type="text"/>	<input type="text"/>		

- Parcel ID and Owner Name:

Parcel IDs

Parcel ID (PIN)

or PIN or PIN or PIN or PIN or PIN

Owner Names

Owner Name

or Owner Name or Owner Name

- Deed Information

Deed

Deed Date From Year From

Deed Date To Year To

- Sales Information

Sales

Sale Date From Year From Price From

Sale Date To Year To Price To

- Land Information

Land

LandVal From Acres From Land SqFt From

LandVal To Acres To Land SqFt To

- Legal Information

Legal

Lot Block

Subdivision Starts With Contains

- Miscellaneous Characteristics:

General

Only Out of State Owners

Land Use Codes

(SFR) SMALL VACANT TRACTS OF L - C11
 COMMERCIAL - VACANT PLOTTED LO - C12
 COMMERCIAL IMPROVEMENTS - F10
 ELECTRIC COMPANIES - J30

School: Exemption: Owner Occupied:

Year Built From: Impr SqFt From: Assessed Value From: Improved Value From: Market Value From:

Year Built To: Impr SqFt To: Assessed Value To: improved Value To: Market Value To:

Characteristics

Foundation: Exterior Wall: Fire Place: Pool: BedRooms: Full Bath:

- **Saved Searches:** For common searches, you may utilize the Saved Searches option. To do this, enter in your search criteria, scroll down to that section of the search screen, input the name of choice and click the **SEARCH** button.

**Please note that this tool is client side and will only work if you have set your internet browser to accept cookies.*

Saved Searches

Save this search as:

- After you have added the Saved Search, you can access it or any others by selecting them from the list that will be created and can be accessed by either the Basic or Advanced search screens:

Search Name		
collin1	Select	Delete
collin2	Select	Delete
collin3	Select	Delete

- **Preferences:** Located on the NTREIS tool bar, there is an Preferences button. This section allows you to modify the reports that get printed with Master Report. As an example, if you never want to see Demographics with the Master Reports that you print, simply un-select the box next to Demographics.

Preferences

Reports to include in Master Report:

Detail Demographics
 School Subdivision
 Tax Neighbors
 Deed Sales

SECTION 2--SEARCH RESULTS

NOTE: All searches will produce a search results list that can be downloaded. See [DOWNLOADING FILES](#).

- **Search Results:** Once the search criteria have been selected, click on **SEARCH**. This will produce the search results list.

NOTE: The County of choice and the total number of records found will appear at the top of the list as highlighted below.

Search Results

County: **Collin** Showing 1-20 of 65 with 20 Lines per page. Search Criteria

With checked rows: Check All Narrow List Show All Print Preview Print Download

1 2 3 4	Pin : Card	Address	Use	Owner	Value	Rooms	Baths	Impr	SqFt	Built	Map	Stories
<input type="checkbox"/>	R2131425:1	102 ELM CIR	C1	FLEMING RUSSELL T	\$25,000							
<input type="checkbox"/>	R2131416:1	103 ELM CIR	C1	FRANKUM LTD	\$15,000							
<input type="checkbox"/>	R2131424:1	104 ELM CIR	C1	FRANKUM LTD	\$15,000							
<input type="checkbox"/>	R2131417:1	105 ELM CIR	C1	FRANKUM LTD	\$15,000							
<input type="checkbox"/>	R2131423:1	106 ELM CIR	C1	FRANKUM LTD	\$15,000							
<input type="checkbox"/>	R980932:1	106 E ELM ST	F1	MARKS E L JR & TEENA	\$62,175			2400		1986		
<input type="checkbox"/>	R2144910:1	106 ELM CIR	M7	PHILLIPS BRIAN	\$42,806			1456		2001		

- You may change the screen view by entering the number of results you want to see and then clicking the **Lines Per Page** button or by utilizing the navigation row by clicking the **PAGE NUMBER** you would like to access.
NOTE: When using the **LINES PER PAGE** option, please select within 5 to 100 lines only.
- You may select a specific property, or choose one of the download options (see [DOWNLOADING FILES](#)). To select a property, simply click on the hypertext (or the underlined words).
- There is also the added benefit of sorting the data onscreen by simply clicking on the column name of choice.
- Click once to sort in Ascending order or click twice to sort in Descending order.
- You also have the benefit of creating labels on the fly in the popular Adobe PDF file format. For more information on Creating a pdf file, please see [Creating a PDF label file](#).
- You may also select specific property records to view, print or download by clicking each selection box to the right of the Parcel ID. Once this is done you then click the **NARROW LIST** button.

Pin : Card	Address	Use	Owner	Value	Rooms	Baths	Impr	SqFt	Built	Map	Stories
<input checked="" type="checkbox"/> R2131425:1	102 ELM CIR	C1	FLEMING RUSSELL T	\$25,000							
<input checked="" type="checkbox"/> R2131416:1	103 ELM CIR	C1	FRANKUM LTD	\$15,000							
<input checked="" type="checkbox"/> R2131424:1	104 ELM CIR	C1	FRANKUM LTD	\$15,000							
<input type="checkbox"/> R2131417:1	105 ELM CIR	C1	FRANKUM LTD	\$15,000							

- You may now obtain a **PRINT PREVIEW** of each selected property.
 - Or **PRINT** a Property Report for each selected property by clicking either of those buttons.
 - To return to your original list of search results, click the **SHOW ALL** button.
- You may also view detailed property data for any result by clicking its Parcel ID number. We will cover Property Detail in the next section

SECTION 2--PROPERTY DETAIL

- Once a property has been selected, you will be taken to the Property Profile summary.

Selected Property

Denton County, TX

Owner: BROWN INVESTMENT CORP
Address: 101 ELM ST
PIN: R53286
Total Value: \$31,658
Land Use: COMMERCIAL - REAL PROPERTY

[Perform Radius Search](#)
[View Tax Map](#)

Available Reports

[Property Profile](#)
[Taxes](#)
[Schools](#)
[Deed History](#)
[Demographics](#)
[Subdivision](#)
[Recent Sales](#)
[Neighbors](#)

Other Links

[Locate on GlobeExplorer](#)
[Locate on MapQuest](#)
[Locate Telephone Number](#)

[Master Report](#) With Cover Page?

PROPERTY **Info** Data Deemed Reliable. But Not Guaranteed [Privacy Policy](#)
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- You will notice the available links on the right. You may click on each hypertext to see an individual report, or you may select the **MASTER REPORT** to see all available information in one report. (**See also PREFERENCES**) We will now review each report.

- **AVAILABLE REPORTS**

- **Profile Report** gives you a variety of information regarding the property. Included in this information is:
 - General Property Description
 - Land Characteristics
 - County Appraisal District Property Values
 - Residential Property Characteristics
 - Previous MLS Sales Information (if available and if within last two years)
 - Previous Deed Information (if available)
 - Taxpayer Information
 - Owner Information
 - **Flood Information** - within the Property Profile, there is also the FEMA flood information where available. See the flood zone code [definitions](#) for more information.
- **Subdivision Report** consists of:
 - Parcel Statistics (number of dwellings)
 - Parcel Characteristics regarding Land Size
 - Improved Characteristics regarding the dwellings

- **School Report** provides a list of schools in the general vicinity (includes address and phone number of school).
- **Deed History** provides the ownership changes for the parcel (*where available*).
- **Recent Sales** provides a list of nearby properties that have sold in the last 12 months (*where available*).
- **Neighbors Report** provides a list of the owners of nearby properties.
- **Demographics Report** provides demographics for the subject parcel. Included in the demographics are population, median household income, age, occupation, etc.
- **Tax Report** provides a list of the taxing authorities of the parcel, the tax rate and the tax amount (all based on the property before any exemptions are applied). Previous 2 years tax history is also shown.
- **Master Report** is a printable report of all of the above reports - combined into one report. (**See also PREFERENCES**)
 - You may also choose to utilize the cover page option by clicking the selection box and then entering in your information as needed:

[Master Report](#) With Cover Page?

Master Report Prepared For:

Name

Address

Phone

Fax

- **Radius Search** allows the user to utilize a source property and retrieve a list of all properties with valid street addresses within 1/8 mile up to 2.0 miles. The results can then be downloaded. See [DOWNLOADING](#).
- **View Tax Map** provides a map image that allows you to zoom in or zoom out as needed to view parcel boundary lines and Parcel ID's (as available)



- **OTHER LINKS**

- **Locate on GlobeXplorer** provides Aerial images (with a watermark) of the selected property and may be viewed free of charge by clicking on the GlobeXplorer link. Aerial images of the selected property without a watermark may be purchased for an additional fee by following the instructions on the GlobeXplorer link.
- **Locate on MapQuest** allows you to locate and print a MapQuest locator map of the selected property.
- **Locate Telephone Number** will pass address of the selected property through www.Whitepages.com and retrieve any listed telephone numbers of that property address.
- **Order Flood Determination** provides you the option to obtain a flood determination on the property selected for an additional fee.
- **Order Tax Statement** provides you the option to obtain a Tax Statement for the selected property for an additional fee

Other Links

[Locate on GlobeXplorer](#)

[Locate on MapQuest](#)

[Locate Telephone Number](#)

[Order Flood Determination \\$19.95](#)

[Order Tax Statement \\$15.00](#)

SECTION 3-- DOWNLOADS/CREATING LABELS

- All search result screens throughout NTREIS Tax are downloadable. Once you have retrieved your required list of results, click the **DOWNLOAD** button. All Search results may be downloaded to:
 - [Excel](#)
 - [Word](#)
 - [Text](#)
 - See also [Creating Labels](#).

EXCEL

- Choose to download the file to Excel by clicking on the button next to "Excel"
- You are next given the opportunity to select the information that you wish to be included in the downloaded file. Simply click on the box next to each data element that you want included on the export file. To de-select an item, simply click on the box again to remove the check mark.

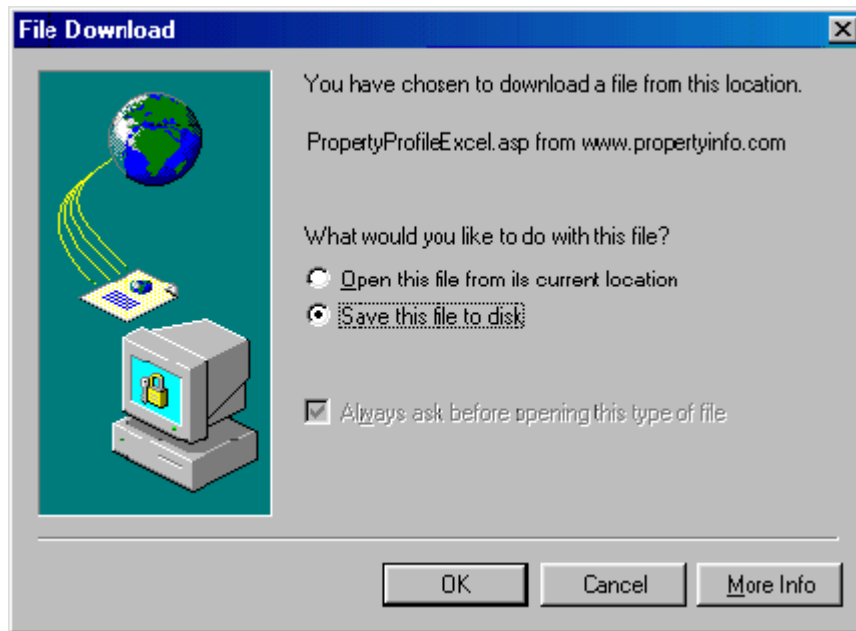
Fields to download:

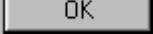
<input checked="" type="checkbox"/> Parcel ID	<input checked="" type="checkbox"/> Subdivision
<input checked="" type="checkbox"/> Property Address	<input checked="" type="checkbox"/> Land Use
<input checked="" type="checkbox"/> Prop Address Parsed Out	<input checked="" type="checkbox"/> Commercial Use
<input checked="" type="checkbox"/> Or Current Resident	<input checked="" type="checkbox"/> Beds
<input checked="" type="checkbox"/> Taxpayer Info	<input checked="" type="checkbox"/> Baths
<input checked="" type="checkbox"/> Owner Info	<input checked="" type="checkbox"/> Stories
<input checked="" type="checkbox"/> Improved Value	<input checked="" type="checkbox"/> Year Built
<input checked="" type="checkbox"/> Land Value	<input checked="" type="checkbox"/> Last Sale
<input checked="" type="checkbox"/> Total Value	<input checked="" type="checkbox"/> Last Price
<input checked="" type="checkbox"/> Market Value	<input checked="" type="checkbox"/> Deed Date
<input checked="" type="checkbox"/> Improved SqFt	<input checked="" type="checkbox"/> Lender
<input checked="" type="checkbox"/> Leasable SqFt	<input checked="" type="checkbox"/> Acreage
<input checked="" type="checkbox"/> Map Grid	<input checked="" type="checkbox"/> Zone
<input checked="" type="checkbox"/> Map Facet	

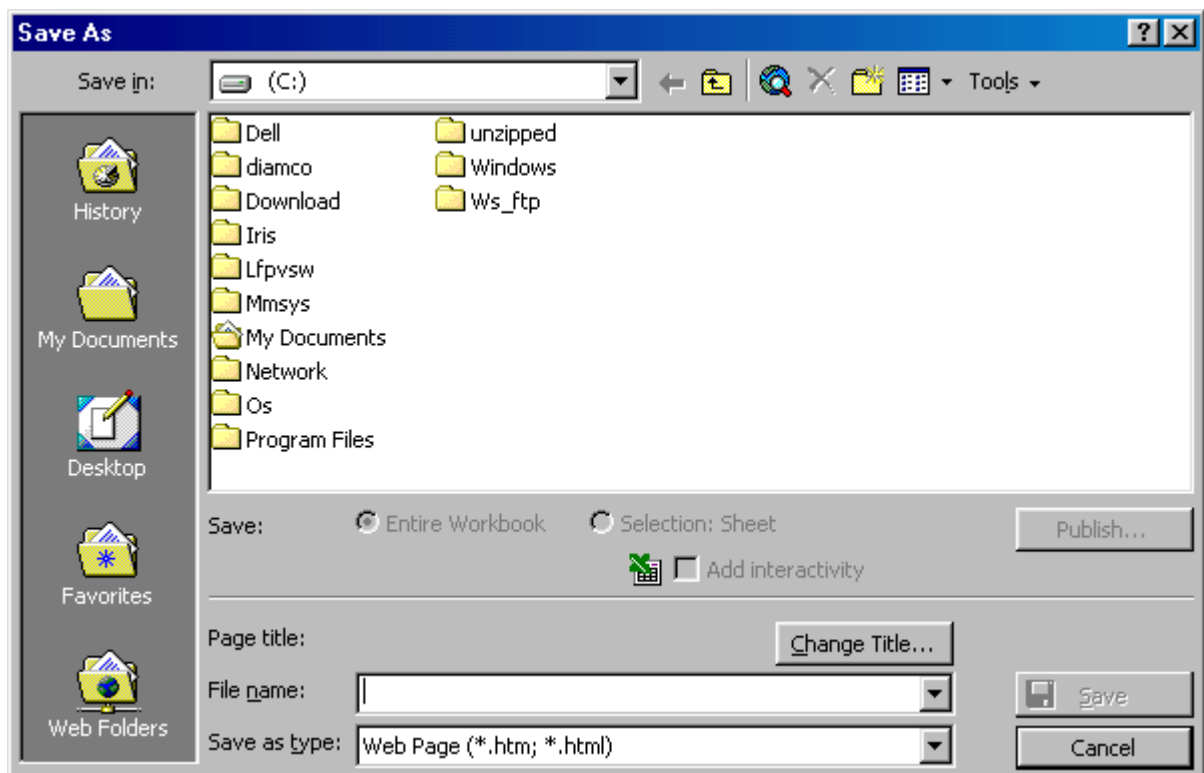
Format:

Excel Word Plain Text

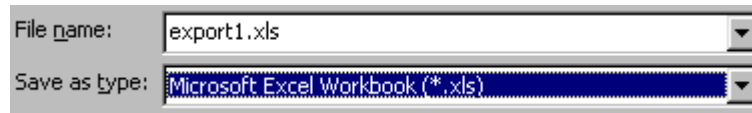
- You may select all options at once by clicking the button, if you would like to unselect any options you have previously chosen, click the button.
- Then select the button to continue the download process.
- You will then be prompted as to whether or not to open the file from the current location.



- Click on "Save this file to disk" and click on 
- The Save As wizard will appear and allow you to select the desired drive and/or folder you wish to save the file within.
- You must now save this file.
 - Select a directory from those shown - be sure to remember the location.

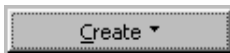
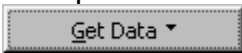


- Once you have selected the appropriate directory on your computer, you must next type a name in the **File name** box:
- **NOTE:** You must then select **Microsoft Excel Workbook (*.xls)** in the **Save as type** box.



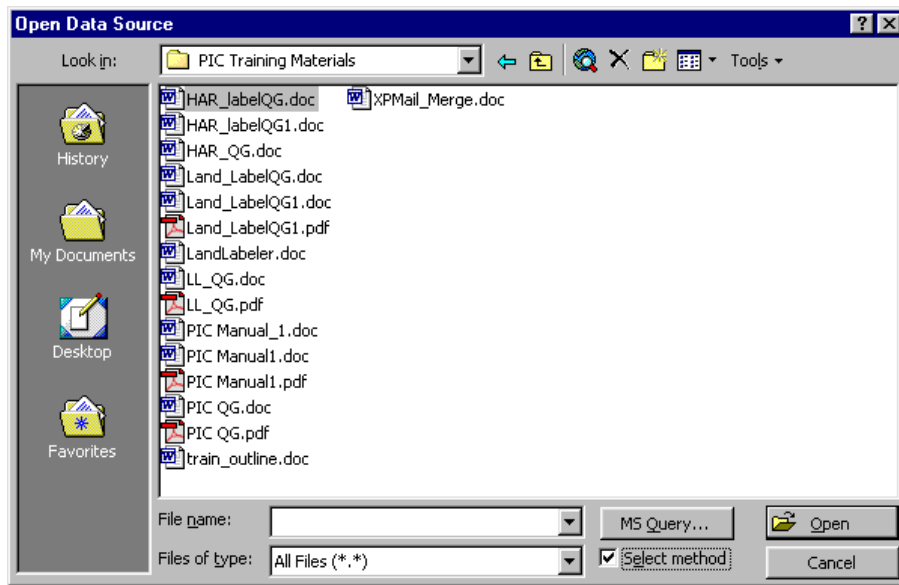
CREATING LABELS - You may now use this Excel file to create labels or to use in a mail merge document.


- Open a new document in Microsoft Word;
- On the Menu - select **Tools**;
- Select **Mail Merge** from the **Tools** drop down menu. The Mail Merge Helper dialog box appears.

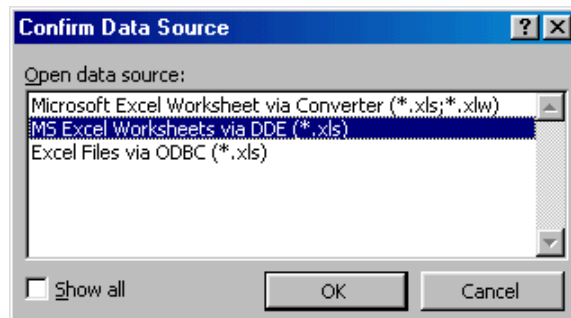
- Under 1. Main Document, click on ;
- Select **Mailing Labels** on the Create drop down menu;
- Select **Active Window**. The active document becomes the Mail Merge main document.
- Word returns to the Mail Merge Helper.
- Under 2. Data Source, Select ;
- Select **Open Data Source** on the Get Data drop down menu;
- You must now locate the file that you created from the download procedure.
 - Select the directory where the file is located;
 - Change the box next to **Files of Type** to *Microsoft Excel Worksheets (*.xls)*;

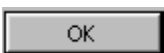


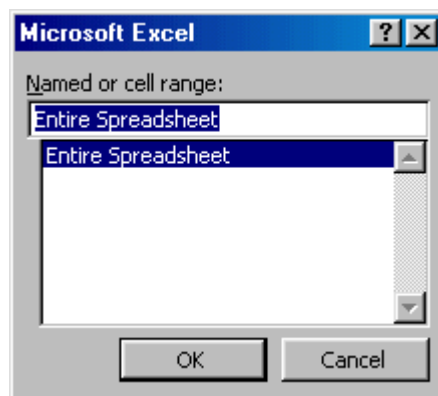
- Click on the appropriate saved file twice to open the file.
- If using an older version of MS Word (i.e. 97 or prior) you may receive an error message similar to the following: **"Can not open the data source"** If that happens, you will need to click in the box beside **Select method** before opening your source document.



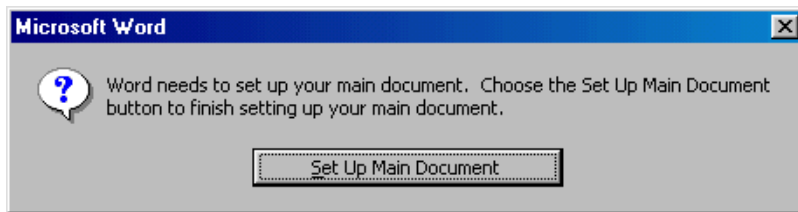
- Click on  and when asked, confirm the Data Source type; (***Note: there may be an entry for opening files via ODBC if this converter is installed. DO NOT SELECT THIS CONVERTER**)



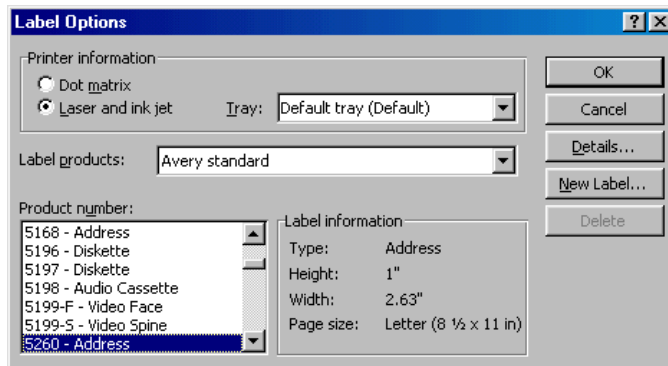
- Click on  when asked the Named or cell range:



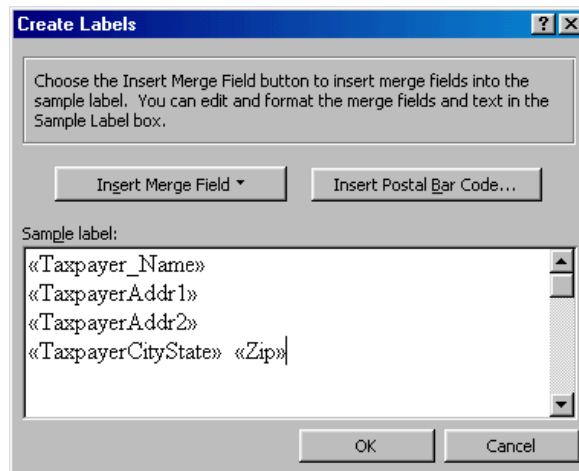
- Click on "Set Up Main Document" to continue:



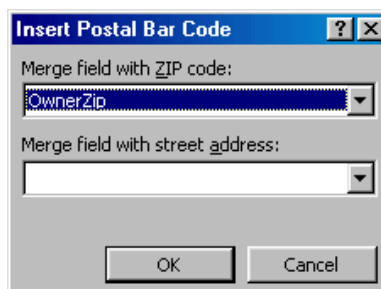
- Choose the appropriate label product from the Product Number menu:



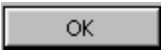


- Click on **OK** to continue.
- You are now brought to the **Create Label** screen. You must indicate the layout of the merged data. Click on **Insert Merge Field** to select each fields and the order of each.

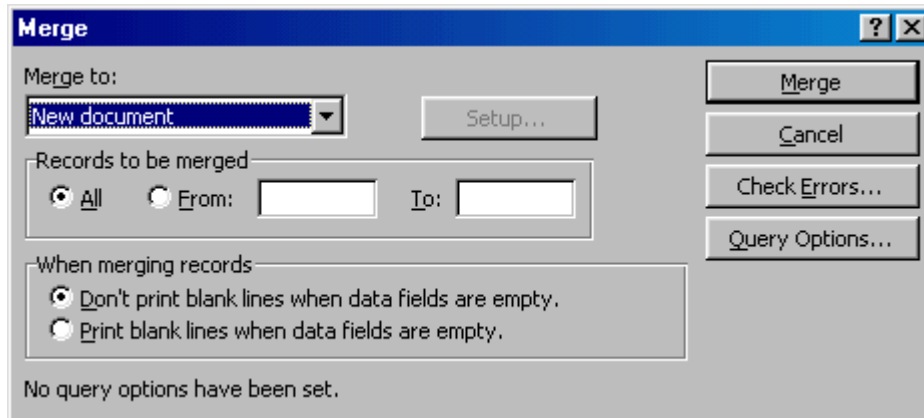


IF Using Barcodes, Click the “Insert Postal Bar Code” button and then Merge the Zip Code Field as Follows:



NOTE: You can also type inside the label as you insert merge fields to personalize the look of the mailing label (I.E. To Our Neighbor)

- Click on  to continue.
- You are now brought back to the Mail Merge Helper. Click on  (Item 3) to continue.
- You are now prompted to select a location for the merge. Accept **New Document** by clicking on .



- After the merged document appears on the screen, you can save this as a separate document or you may print your labels by clicking on **Print** on the **File** drop down menu

SECTION 3-- DOWNLOADS/CREATING LABELS

WORD

The following will detail instructions for downloading to Microsoft Word.

- Choose to download the file to Word by clicking on the button next to "Word".
- You are next given the opportunity to select the information that you wish to be included in the downloaded file. Simply click on the box next to each data element that you want included on the export file. To de-select an item, simply click on the box again to remove the check mark.

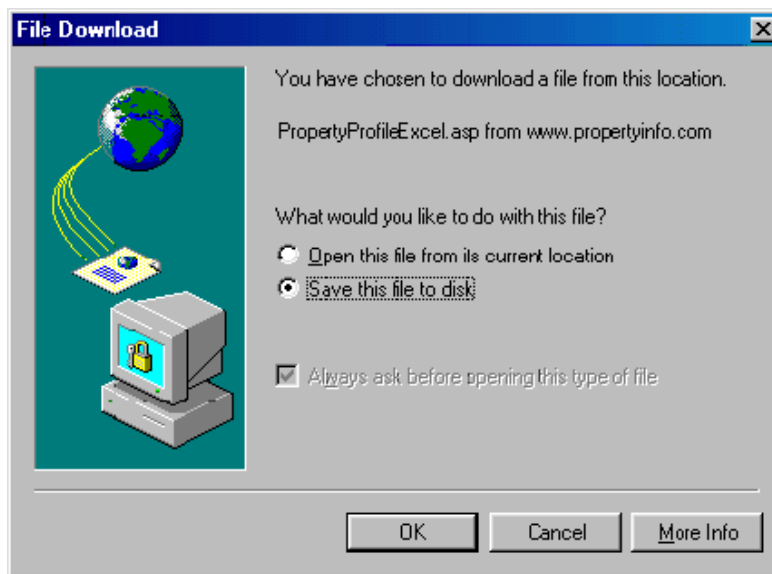
Fields to download:


<input checked="" type="checkbox"/> Parcel ID	<input checked="" type="checkbox"/> Subdivision
<input checked="" type="checkbox"/> Property Address	<input checked="" type="checkbox"/> Land Use
<input checked="" type="checkbox"/> Prop Address Parsed Out	<input checked="" type="checkbox"/> Commercial Use
<input checked="" type="checkbox"/> Or Current Resident	<input checked="" type="checkbox"/> Beds
<input checked="" type="checkbox"/> Taxpayer Info	<input checked="" type="checkbox"/> Baths
<input checked="" type="checkbox"/> Owner Info	<input checked="" type="checkbox"/> Stories
<input checked="" type="checkbox"/> Improved Value	<input checked="" type="checkbox"/> Year Built
<input checked="" type="checkbox"/> Land Value	<input checked="" type="checkbox"/> Last Sale
<input checked="" type="checkbox"/> Total Value	<input checked="" type="checkbox"/> Last Price
<input checked="" type="checkbox"/> Market Value	<input checked="" type="checkbox"/> Deed Date
<input checked="" type="checkbox"/> Improved SqFt	<input checked="" type="checkbox"/> Lender
<input checked="" type="checkbox"/> Leasable SqFt	<input checked="" type="checkbox"/> Acreage
<input checked="" type="checkbox"/> Map Grid	<input checked="" type="checkbox"/> Zone
<input checked="" type="checkbox"/> Map Facet	


Format:

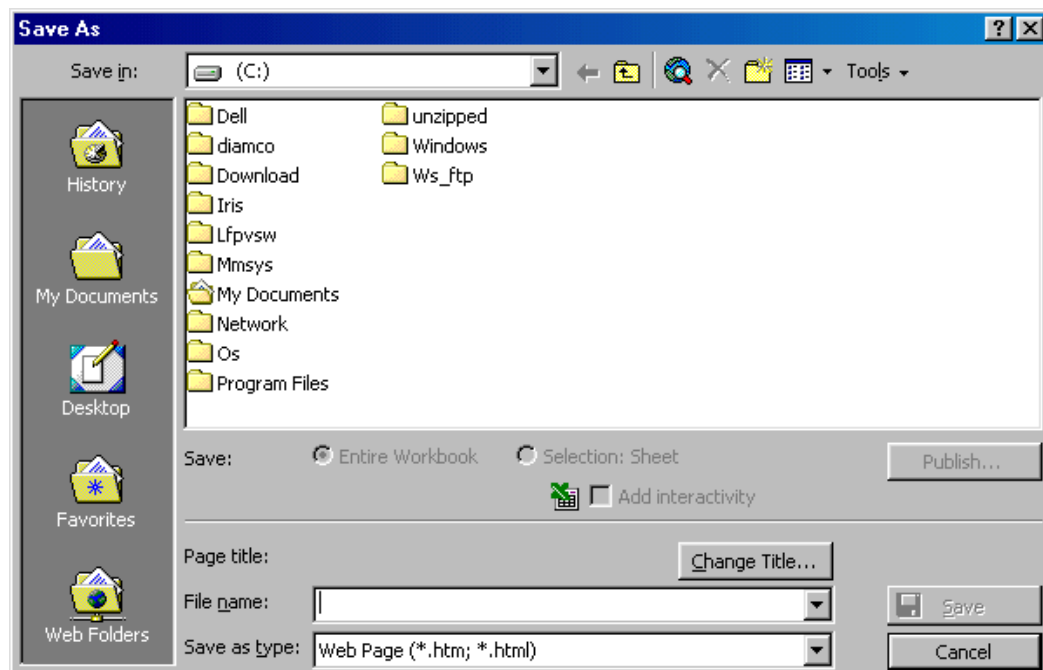
Excel Word Plain Text

- You may select all options at once by clicking the button, if you would like to unselect any options you have previously chosen, click the button.
- Then select the button to continue the download process.
- You will then be prompted as to whether or not to open the file from the current location.



- Click on "Save this file to disk" and click on 
- The Save As wizard will appear and allow you to select the desired drive and/or folder you wish to save the file within.
- You must now save this file.
 - Select a directory from those shown - be sure to remember the location.

- Click on "Open this file from its current location" and click on 
- A Word Document will open with the requested data elements and with data headings.
- You must now save this file.
 - Click on **FILE** at the top of your browser.
 - Click on **SAVE AS** in the drop down menu under **FILE**.
 - Select a directory from those shown - be sure to remember the location.



- Once you have selected the appropriate directory on your computer, you must next type a name in the **File name** box:
- **NOTE:** You must then select **Word Document (*.doc)** in the **Save as type** box.

File name:	export1.doc
Save as type:	Word Document (*.doc)

SECTION 3-- DOWNLOADS/CREATING LABELS

TEXT

The following will detail instructions for downloading to a text file. By downloading the data to text files, you may import to databases that you keep in different software such as ACT! or Microsoft Access.

- Choose to download the file to a Text file by clicking on the next to "Text".
- You are next given the opportunity to select the information that you wish to be included in the downloaded file. Simply click on the next to each data element that you want included on the export file. To de-select an item, simply click on the again to remove the check mark.

Fields to download:

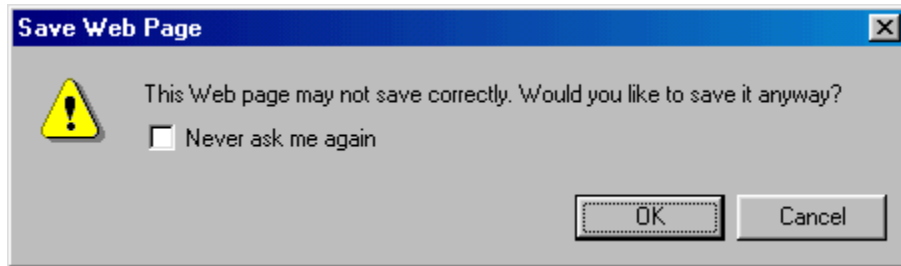
<input checked="" type="checkbox"/> Parcel ID	<input checked="" type="checkbox"/> Subdivision
<input checked="" type="checkbox"/> Property Address	<input checked="" type="checkbox"/> Land Use
<input checked="" type="checkbox"/> Prop Address Parsed Out	<input checked="" type="checkbox"/> Commercial Use
<input checked="" type="checkbox"/> Or Current Resident	<input checked="" type="checkbox"/> Beds
<input checked="" type="checkbox"/> Taxpayer Info	<input checked="" type="checkbox"/> Baths
<input checked="" type="checkbox"/> Owner Info	<input checked="" type="checkbox"/> Stories
<input checked="" type="checkbox"/> Improved Value	<input checked="" type="checkbox"/> Year Built
<input checked="" type="checkbox"/> Land Value	<input checked="" type="checkbox"/> Last Sale
<input checked="" type="checkbox"/> Total Value	<input checked="" type="checkbox"/> Last Price
<input checked="" type="checkbox"/> Market Value	<input checked="" type="checkbox"/> Deed Date
<input checked="" type="checkbox"/> Improved SqFt	<input checked="" type="checkbox"/> Lender
<input checked="" type="checkbox"/> Leasable SqFt	<input checked="" type="checkbox"/> Acreage
<input checked="" type="checkbox"/> Map Grid	<input checked="" type="checkbox"/> Zone
<input checked="" type="checkbox"/> Map Facet	

Format:

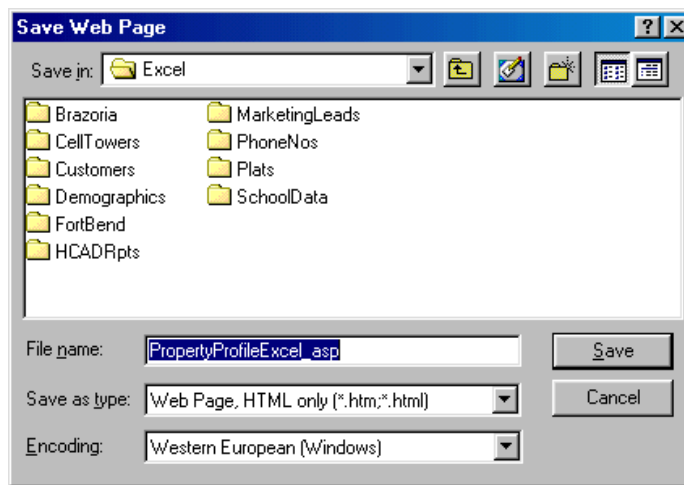
Excel Word Plain Text

- You may select all options at once by clicking the button, if you would like to unselect any options you have previously chosen, click the button.
- Then select the button to continue the download process.
- Unlike other downloads, you are **NOT** prompted as to whether or not to open the file from the current location. The text file automatically opens to your screen with the requested data elements and with data headings.
- The data elements are separated by a "|" (a sidebar).
- You must now save this file.
 - Click on **FILE** at the top of your browser.

- Click on **SAVE AS** in the drop down menu under **FILE**.
- NOTE: you may be prompted with the following box:

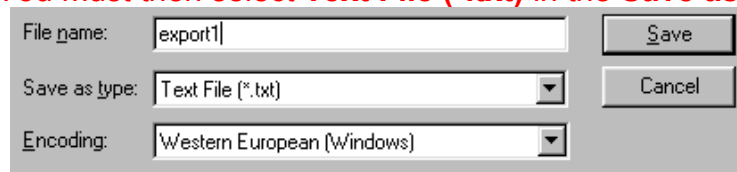


- Click on OK to continue.
- Select a directory from those shown - be sure to remember the location.



- Once you have selected the appropriate directory on your computer, you must next type a name in the **File name** box:

NOTE: You must then select **Text File (*.txt)** in the **Save as type** box.



Then click on .