Property
Centric Data

Realist Tax
Course Handout

by the Houston Association of Realtors®

2 Hours MCE Credit
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Contents

Welcome to Realist

Realist 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.

You can only access Realist 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 Realist 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 Realist Tax until you select this option and click "Submit"

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

Software services include:
- Address, street, owner, tax-id
- 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

Searching in Realist

❶ **Quick Search**:

A Quick Search is the default form that appears in the My Search pane the first time you enter Realist. 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.

❷ **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.

Working with the Results

Search Results Screen

Region controls the county you search.

Move through the main pages using the navigation bar.

Map tools allow you to customize the map to give different perspectives on a search area.

Quick Search tab

Add values to the Attributes in the My Search Panel and click Search. Click Edit Attributes to add and remove fields from the current search.

❶ The Search Results Grid shows all properties that meet your search criteria. Checked properties appear on the map.

View reports, print mailing labels & export search results. You can also choose columns that appear on the grid.

Change the screen view to show the Map, Results Grid or both.

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 in the Change View menu.

❶ 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.

❷ Camera Icon

The camera icon (to the right of the check box only if photos are available) indicates a photo or photos are available to view. When you select Print, all the photos will also print.

❸ MLS Indicator Balloons

If a property is currently in MLS there will be a small balloon indicating the current MLS status of that property. The color of the balloon indicates status (green=Active; orange=Pending, etc.). Also, if you hover on this icon it will display the current MLS status.

Viewing Reports

If you wish to view one report on your list, double click the address on the results grid and a full report will appear. The tabs at the top allow you to navigate through the reports.

Printing

Printing while viewing a detailed report

If while viewing a property record and you wish to print it, click the Print button found on the bottom right hand side of the screen. *Note: You may only print 25 records at a time*
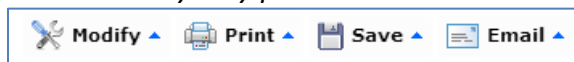
When you select Print, you will have the option to select Quick or Customize. The Quick report will print all information about the property. If you select Customize, you will receive a screen that will allow you to select what information you wish to have printed.
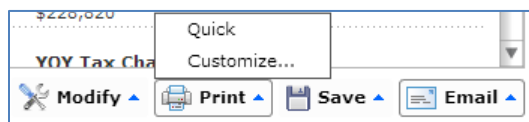
Printing from the search results grid

On the search results page you may print any records you have selected (checked) in the grid view.
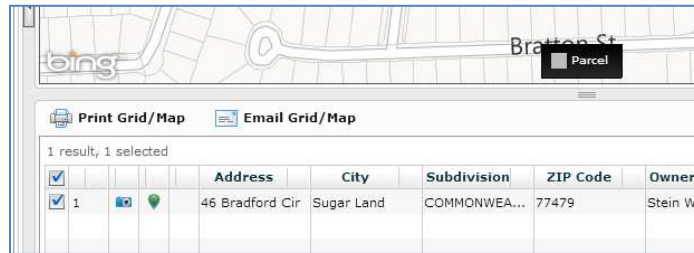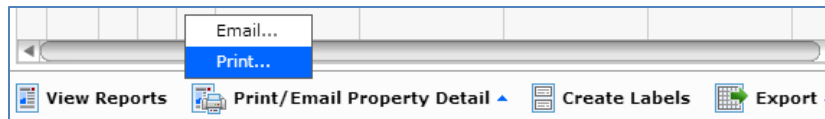

Select print from the Print/Email Property Detail button at the bottom of the page. A PDF view page will open in a new window/tab. Select the printer icon in the upper left hand corner of the screen to print the record(s).

Creating Labels

To create mailing labels select Create Labels button at the bottom of the results grid page.

Use the pop-out window to select the following preferences:

- type of Avery label you will be using
- Mixed Case or All Capital Letters on the labels
- Tax Billing address or the Property Address
- Select Create Custom Label to add a custom greeting such as "Current Resident", etc.
- 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

Use the Edit Grid button in the lower right of the results grid page then select the option you prefer.

Show Only Selected Rows –all the rows that are not selected/checked will be removed.

Restore Full Results List –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 to display or not display, and then click Apply in the lower right hand corner.
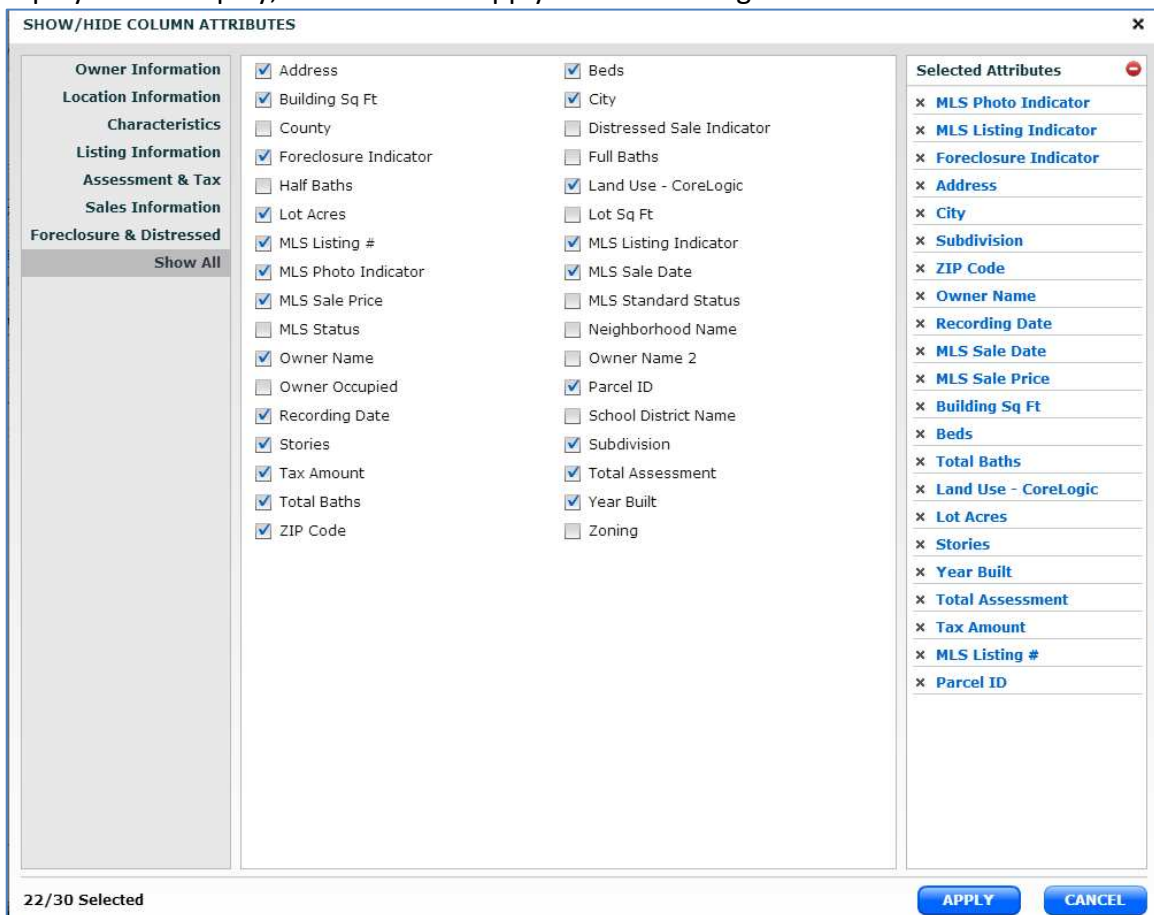
Clear Column Sorting – If you have sorted a column this will restore it back to the previous sort.

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.

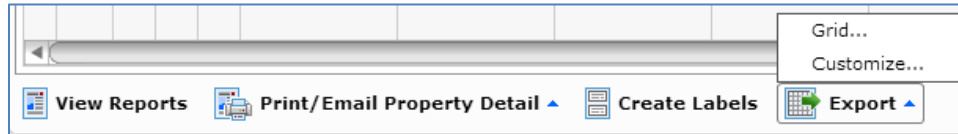Select the records you would like to export. If you have a long list of search results, click the check box at the top of the column to clear all selections, and then select only the properties you want to export.

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. Click either Export or Save Export.

E-Mailing

To E-mail a report from the results grid page, you can choose from two different methods.
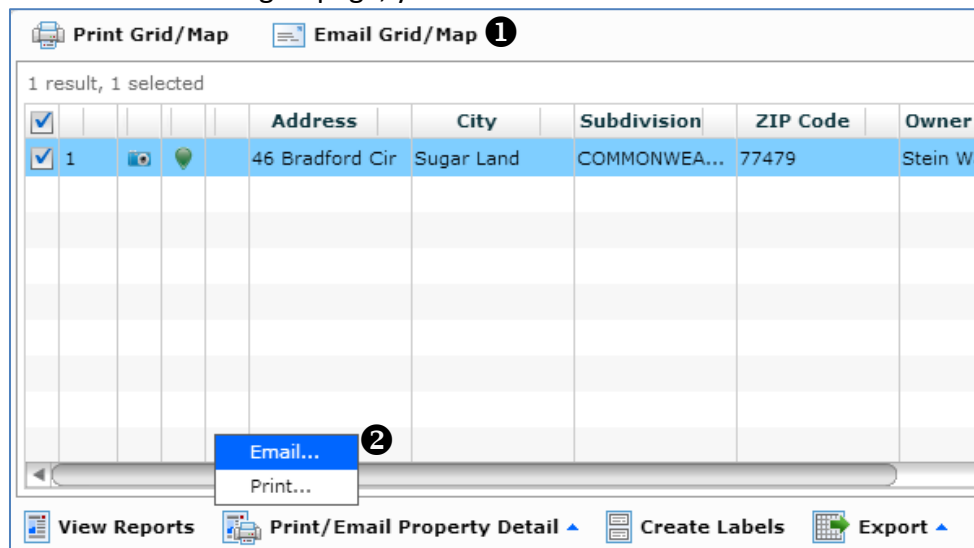
❶ Use the Email Grid/Map button above the grid. This will give you the option to send the map only, the grid and map or the grid only as a PDF attachment.

❷ Use the Print/Email Property Detail button at the bottom of the page and then choose Email. This method will send a PDF attachment of the full property details.
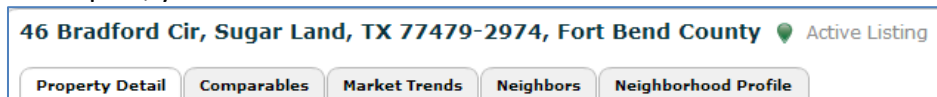
To enter in more than one email address, separate them by a semi-colon (;). Be sure to copy yourself. A pop-up window will confirm that your email was successfully sent.

Options on a Full Report

Comparables

When viewing a Full Report, you have five tabs of information to view.

46 Bradford Cir, Sugar Land, TX 77479-2974, Fort Bend County ● Active Listing

Property Detail | Comparables | Market Trends | Neighbors | Neighborhood Profile

Property Detail – full detail of all available public information from tax as well as MLS data (including property photos), if available.

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 was used to run the initial report and regenerate new output.

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
If there is a sketch of the home associated with the property, a Building Sketch tab appears.

The Main Menu

The main menu at the top, left of Realist allows you to setup some general defaults/preferences such as your search and report defaults, as well as your email signature. You can alter these settings at any time by clicking the Preferences menu.
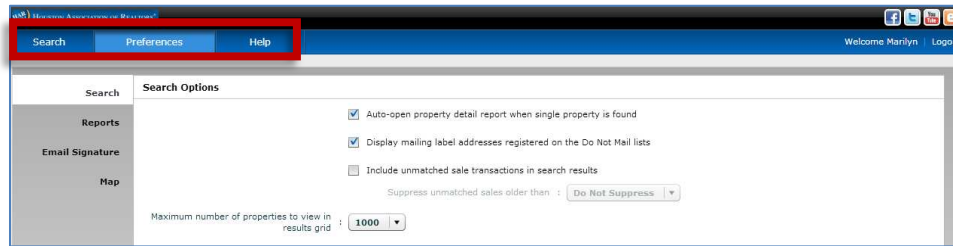

Search Options:

- Auto-open detail report when a single property is found?
- Display mailing label addresses registered on the Do Not Mail lists?
- Include unmatched sale transactions in search results?
  (This 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).
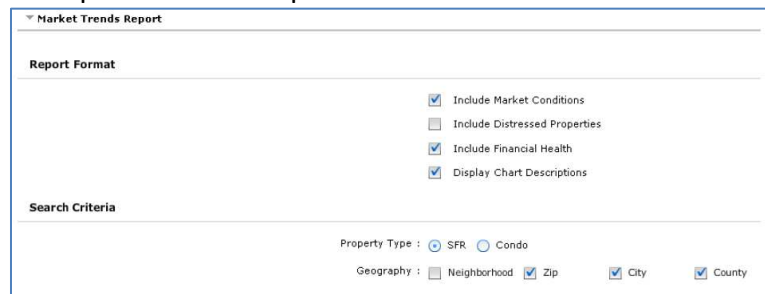- Maximum number of properties to view in results grid? (50 up to 1,000)

Reports Preferences:

Dynamic or Fixed? (choose Dynamic to hide empty fields, fixed to display empty fields)
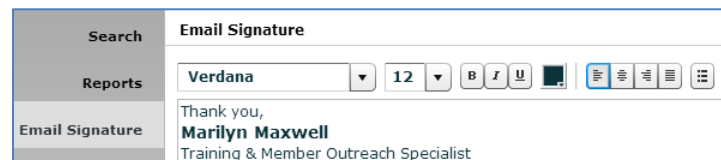At the bottom of the "Report Preferences" screen, select the report name to expand the options.
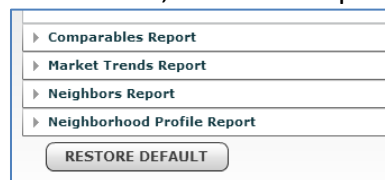
Below is an example of the options on the expanded "Market Trends" menu.

Email Signature:

Map Options:

This option controls whether or not the parcel boundaries show on the Map