

# USER MANUAL SURPLUS DATABASE<sup>©</sup>



V 2023-01

*Organization for your Tax Deed Surplus Records*

## Welcome to Surplus Database Pro (and Tax Auction Surplus)

This manual covers the functional aspects of the Surplus Database (*"How do I..."*, *"Where can I find..."*, etc.). If you need technical assistance or wish to request customization to your database, please log in to the website and submit a Ticket on our help Desk.

We designed this database to assist active Asset Recovery Specialists. If you are just starting your new business in Asset Recovery, please be sure to read all guides and watch our videos so you can fully understand our database and the surplus recovery process.

No matter which website you choose, you will have a steady stream of new Florida Surplus Lists to import into your database. You also receive a wealth of benefits to assist you with Florida Surplus Recovery.

If you have a service that provides you with surplus records from other states, we have an Excel Import Template you can use to bring those records into your Surplus Database.

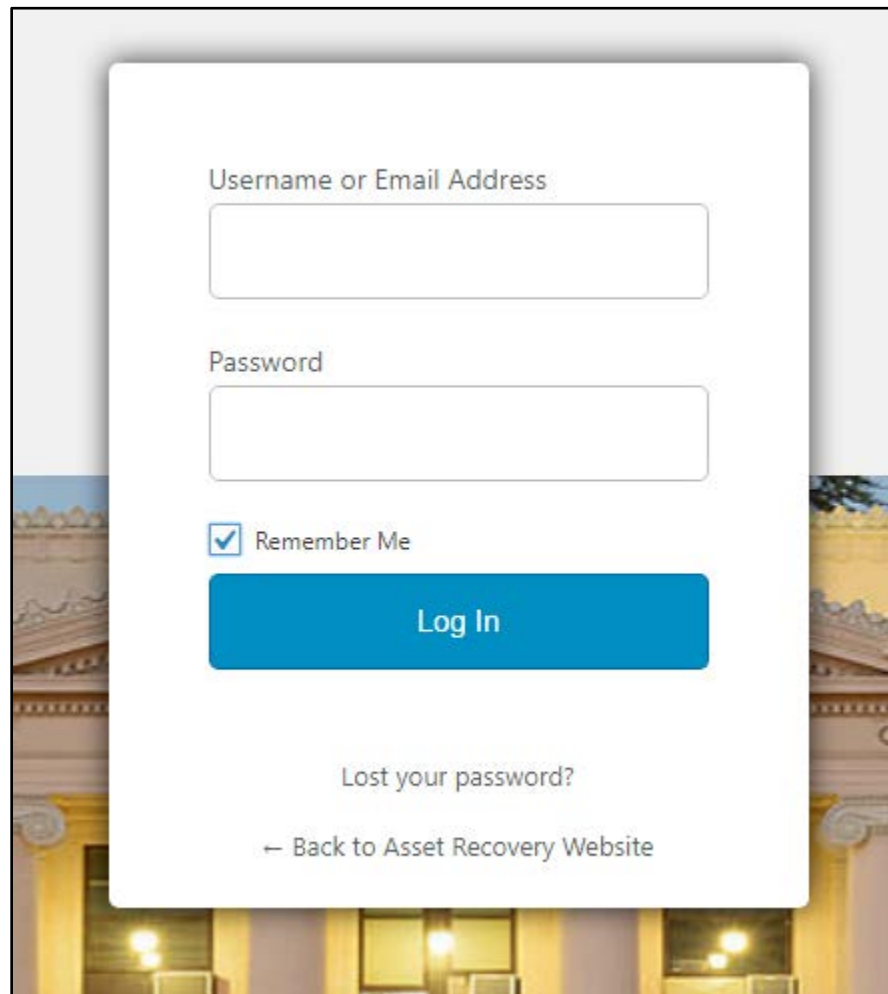
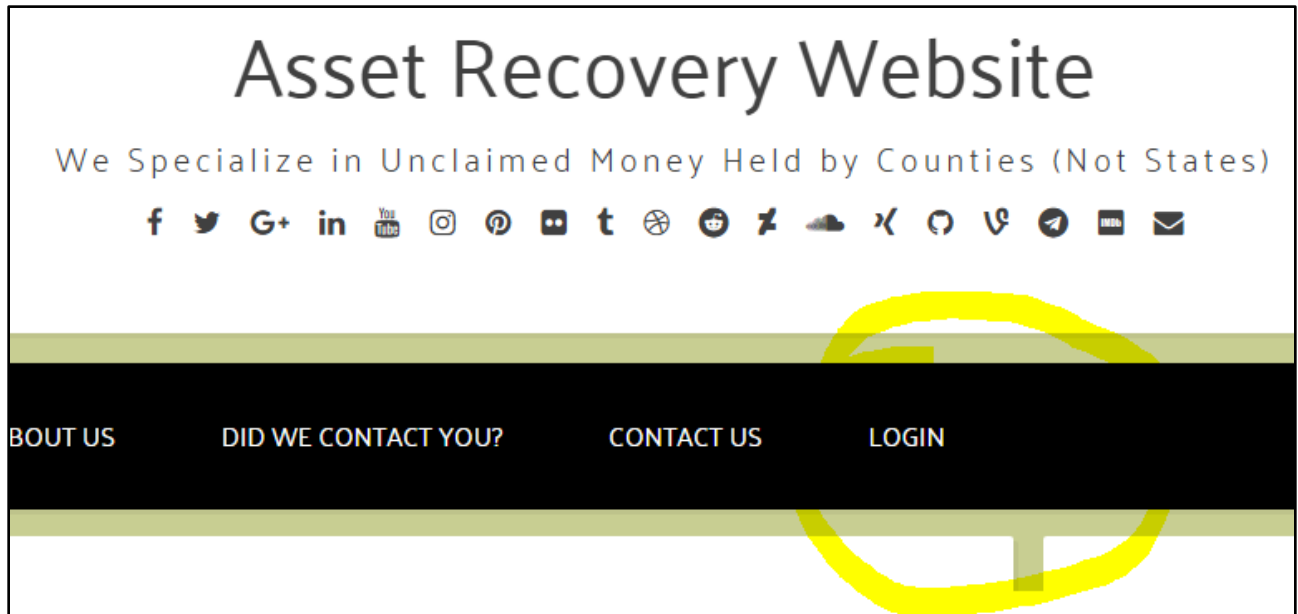
We look forward to helping you succeed with Asset Recovery.

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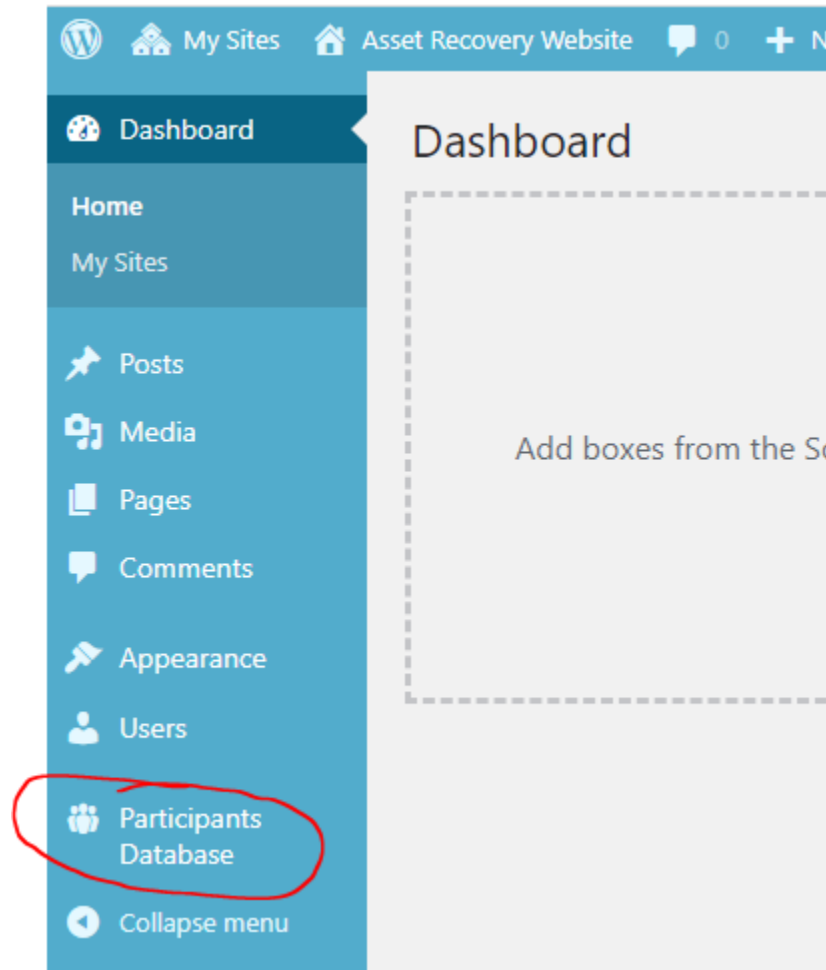
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## ENTER THE DATABASE

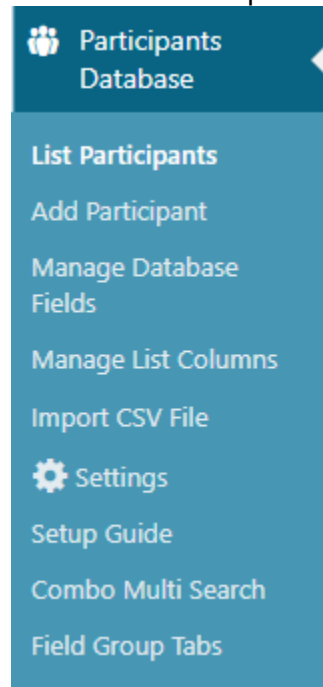
Log in to your website and choose Surplus Database from the WordPress Admin Dashboard



Choose Participants Database from the Menu Bar on the left



The menu will expand to show you all options



# SEARCH MENU

Searching for Records: On the "List Records" page, use the drop-down to choose the field you wish to search and type in your search term

The screenshot shows the 'Surplus Database' interface. At the top, there is a 'List Records' section. Below it, a search filter is active, labeled 'Show only records with:'. A dropdown menu is open, listing various fields: ID, Record ID, Date Recorded, Date Updated, Last Accessed, State, County, Auction Date, Week Number, Auction Notes, Starting Bid, Assessed Value, Ending Bid, Overbid, Surplus, Notes About Figures, Tax Deed, and Parcel Number. The 'Date Updated' field is currently selected. To the right of the dropdown, the search criteria are displayed as 'that contains' followed by a search term. Below the search criteria, there is a 'Number of filters to use: 1' indicator. Further down, there are sorting options: 'Ascending' (unselected) and 'Descending' (selected), with a 'Sort' button. At the bottom of the search area, there is a 'Show 10 items per page. Change' option. The main table below the search area has columns for 'Auction Status', 'Surplus', 'State', and 'County'. A single record is visible with a surplus value of 172,713.15, located in FL, Bay County.

Auction Status	Surplus	State	County
	172,713.15	FL	Bay County

## Private ID vs Record ID

When the records we give you are first brought in to the database by import, there is a field named Private ID. This matches the ID we have in our own Master Database so that if you ever have a question about a particular record, you can give us that Private ID# and we can quickly locate it in our own records.

Once you import the records into YOUR Database, a unique ID (Named Record ID) is created for that record in your database only (we do not see or use that number). It is a unique number to identify that record within your own records, so possibly you would use the Record ID as your "Client Account Number" or "Property ID".

## Special Search Notes

### Search By Tax Deed

Each auctioned property is given a Tax Deed Number by the County. Each county may call this number something different (e.g. Case Number, Clerk Number, File Number, etc.). It is a unique number the county uses to identify that property being auctioned.

When searching by Tax Deed, please note that the format given for this number varies between counties and therefore if, for example, you are looking to find abcd-123 but you enter abcd123 into the search field, it will not be found because you omitted the hyphen

### Search By Parcel

All properties have a Parcel Number. This is basically a social security number for the property. When searching by Parcel, please note that the format given for this number varies between counties and therefore if, for example, you are looking to find 45-7121-339-12 but you enter 45712133912 into the search field, it will not be found because you omitted the hyphens.

# VIEW LIST OF RECORDS

Click "List Participants" and you are presented with a List of all your records. Each record on the list is linked so you can open that record fully using the pencil icon



Participants Database

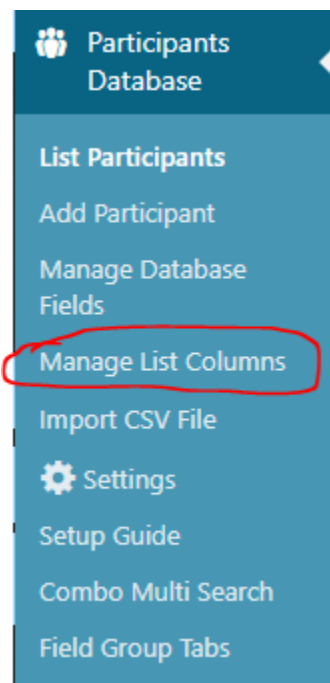
15 records found, sorted by: Date Updated.

Surplus Type	TD Private ID	Current Status	Surplus	Owner Name	MTG Private ID	MTG Status	MTG Surplus	MTG Owner Name
<input type="checkbox"/> mtg		New			Brow-CACE-21-013054	Sold	50,689.27	COHEN, STEPHEN U EST
<input type="checkbox"/> mtg		New			Duva-16-2021-CA-006756-XXXX-MA	Sold	160,169.40	CHERYL ANN SHARP & JAMES OLIN & CRVSTINA LEWIS
<input type="checkbox"/> mtg		New			Oran-2021-CA-011422-Q	Sold	69,178.96	Duhon Thomas L Estate
<input type="checkbox"/> mtg		New			Polk-2021CA0005350000	Sold	53,157.50	HAMM RODNEY

## Choose which columns you see on the List

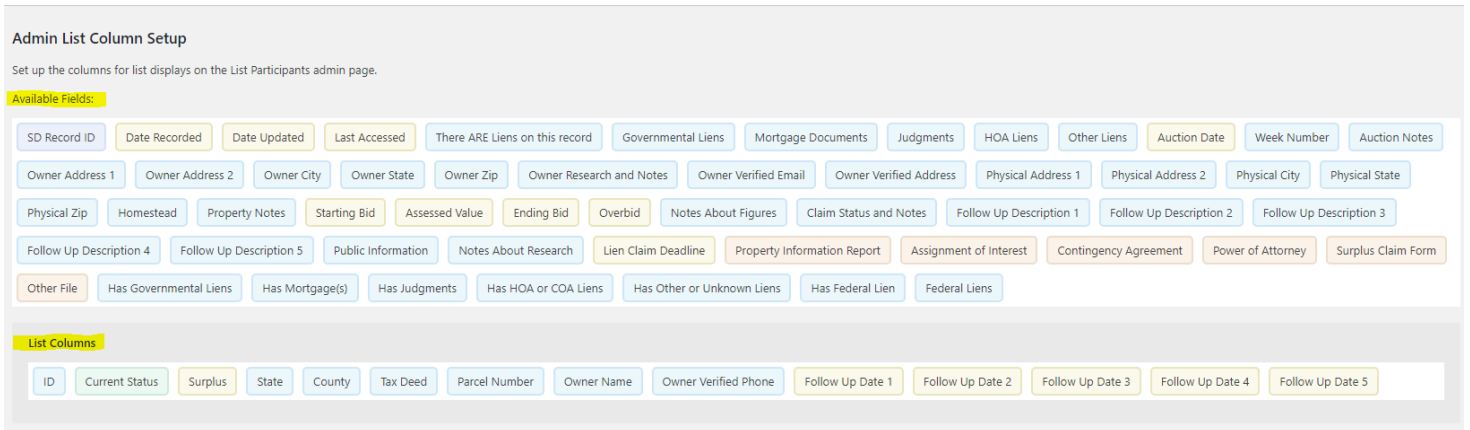
You can choose which columns are most important for you to see on the list.

### STEP 1: Choose "Manage List Columns"





**Step 2: In the “ADMIN LIST COLUMN SETUP”, for the fields you want visible in List View, Click and drag down from “Available Fields” to “List Columns”**

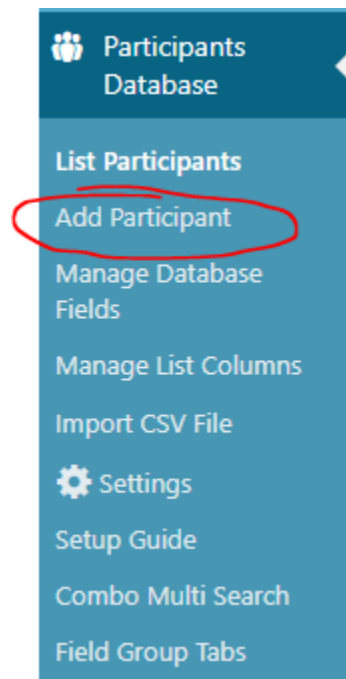


*Please Note, there is also a section for “Public List Column Setup”. This is not used*

## ADD NEW RECORD

Although you will have a steady stream of surplus records to import by bulk into your database, there may come a time when you want to add one single record manually.

### STEP 1: Choose Add Participant from the menu



**STEP 2: Go through each tab on the Add New Record Screen and fill out the info you want**

Add New Surplus Record - Be sure to go through each tab

Record Info | **Auction Details** | Figures | Property Details | Owner Details | Record Research (Available with Pro Subscription) | Claim Status and Notes | Follow Ups | Public Information | Attachments

*Auction Details*

State

County

Auction Date

Week Number

Auction Notes

Save the Record

Submit Apply Next

# MANAGE DATABASE FIELDS

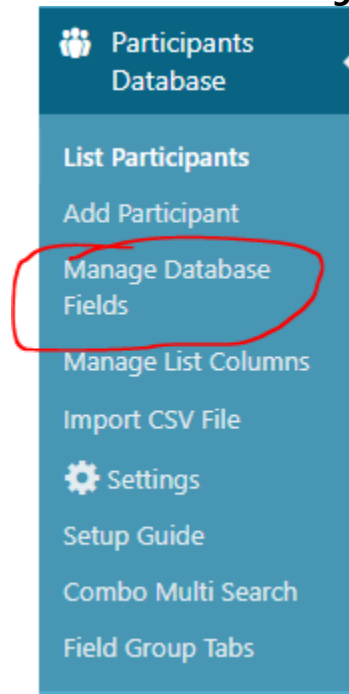
**First and foremost, very important! NEVER DELETE any field that is already in your database which was added by us. If you do, the daily surplus records will not import correctly into your database.**

**You can ADD as many fields as you want and delete those**

## Add a New Field

For this example, we will say that you want to add a field for a fax number of the property owner.

### STEP 1: Choose Manage Database Fields



**STEP 2: Decide on the Tab where this new field should be. In this case, the Tab would be "Owner Details" – Then Click ADD FIELD**

Surplus Database

Manage Database Fields

Field Groups:

Record Info Auction Details Figures Property Details **Owner Details** Record Research Claim Status and Notes Follow Ups

*Owner Details Fields*

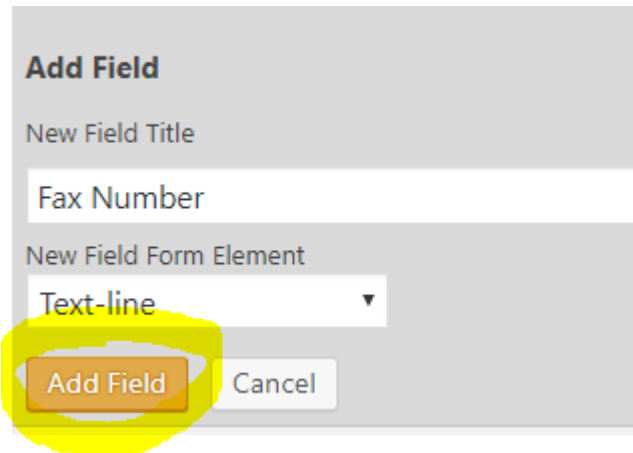
**+ Add Field**

<input type="checkbox"/> <input type="button" value=" &gt;"/>	<input type="button" value=" ▼ ▲ X"/>	Owner Name	Text-line
<input type="checkbox"/> <input type="button" value=" &gt;"/>	<input type="button" value=" ▼ ▲ X"/>	Owner Address 1	Text-line
<input type="checkbox"/> <input type="button" value=" &gt;"/>	<input type="button" value=" ▼ ▲ X"/>	Owner Address 2	Text-line
<input type="checkbox"/> <input type="button" value=" &gt;"/>	<input type="button" value=" ▼ ▲ X"/>	Owner City	Text-line
<input type="checkbox"/> <input type="button" value=" &gt;"/>	<input type="button" value=" ▼ ▲ X"/>	Owner State	Text-line
<input type="checkbox"/> <input type="button" value=" &gt;"/>	<input type="button" value=" ▼ ▲ X"/>	Owner Zip	Text-line
<input type="checkbox"/> <input type="button" value=" &gt;"/>	<input type="button" value=" ▼ ▲ X"/>	Owner Research and Notes	Text Area
<input type="checkbox"/> <input type="button" value=" &gt;"/>	<input type="button" value=" ▼ ▲ X"/>	Owner Verified Phone	Text-line
<input type="checkbox"/> <input type="button" value=" &gt;"/>	<input type="button" value=" ▼ ▲ X"/>	Owner Verified Email	Text-line
<input type="checkbox"/> <input type="button" value=" &gt;"/>	<input type="button" value=" ▼ ▲ X"/>	Owner Verified Address	Text Area

**STEP 3: Type in the Field Title and Choose the type of field from the drop down. In the case of a Fax Number, you may think you should choose numeric however, there may be a point when you type in parentheses around the area code and there are dashes in the phone number, so you would choose Text Line. This will accept numbers, letters and special characters.**

**See FIELD TYPE DESCRIPTIONS AT THE END OF THIS SECTION**

**Step 4: Click Add Field button.**



**Add Field**

New Field Title

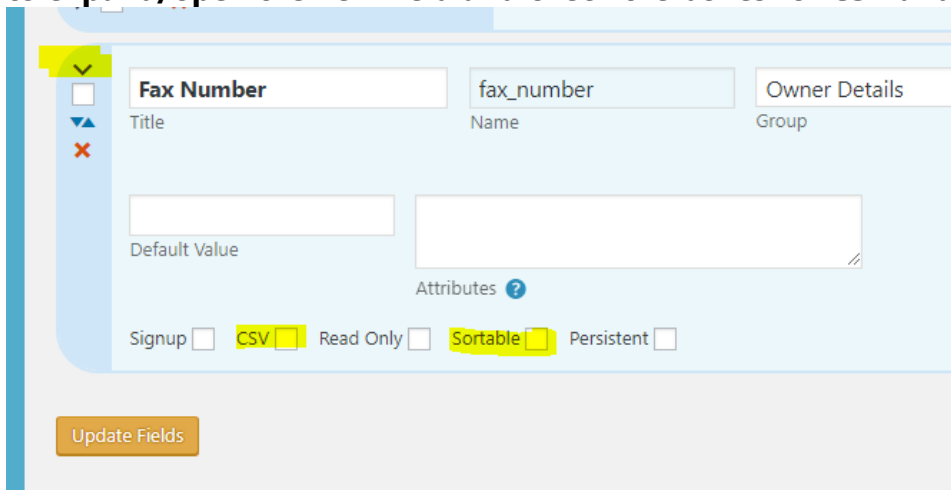
Fax Number

New Field Form Element

Text-line

Add Field Cancel

**STEP 5: (Optional) If you want to be able to sort the Record List by this field and/or make sure this field is exported when/if you export your surplus lists, click on arrow to expand/open the new field and check the boxes for CSV and Sortable**



▼

Fax Number fax\_number Owner Details

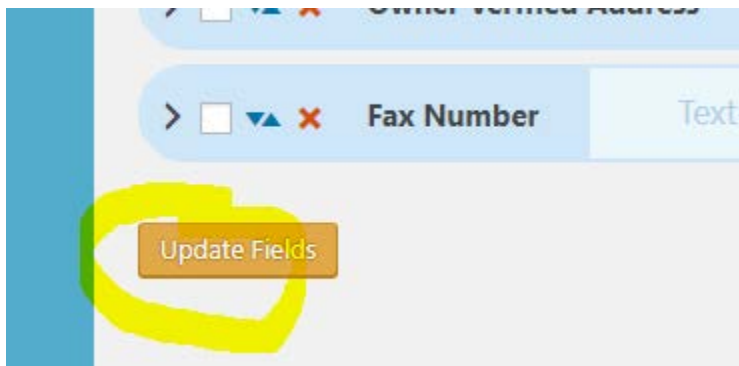
Title Name Group

Default Value Attributes ?

Signup  CSV  Read Only  Sortable  Persistent

Update Fields

**Step 6: Click the Update Fields button or your field will not be saved.**



>  ▼ ▲ ✕ Fax Number Text-

Update Fields

## Field Type Descriptions

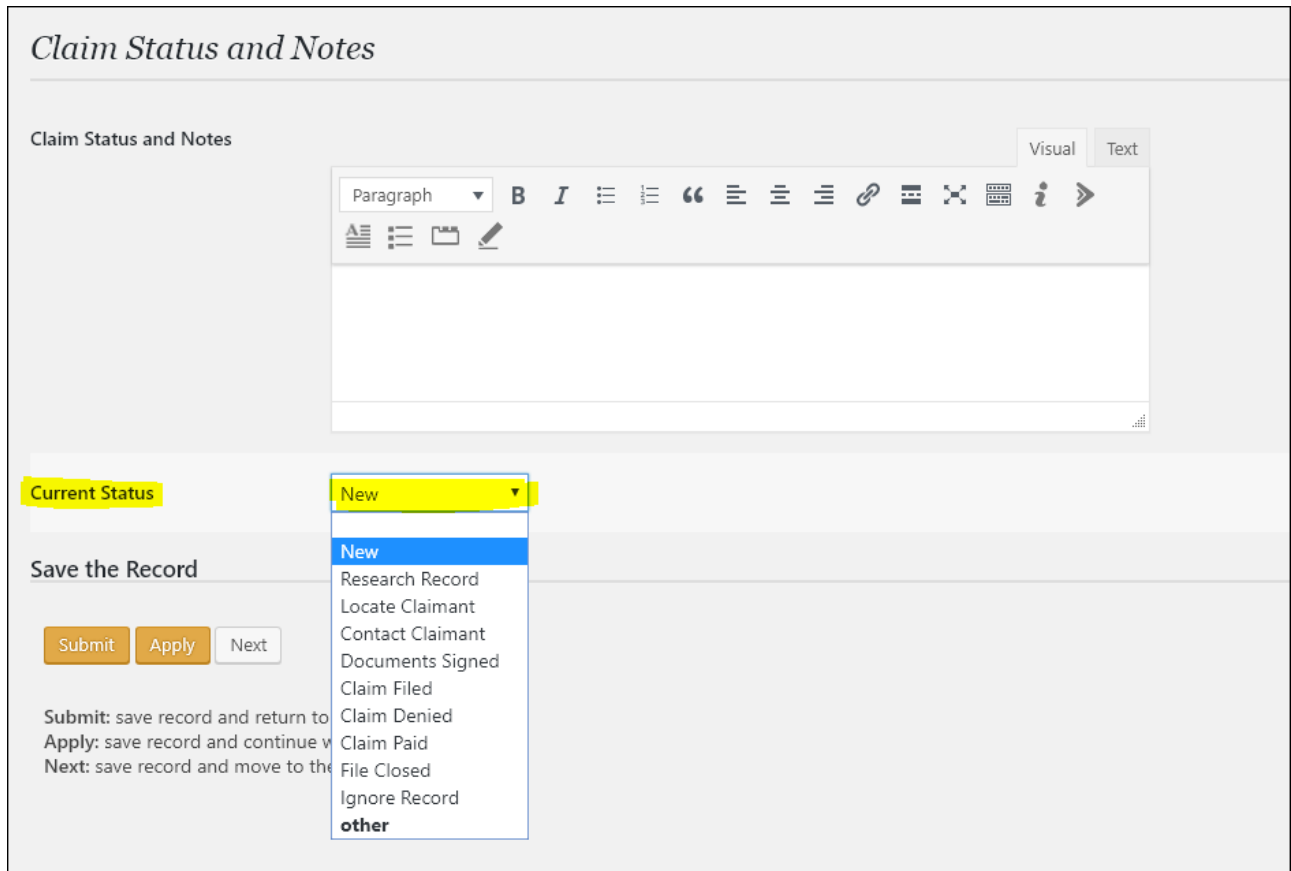
- Text-line – simple text field, limited to 255 characters.
- Text-area – a simple text box with a character limit of 65,000.
- Rich Text – this presents a text editor box like the one used to edit content in WordPress pages and posts. The rich text editor will only be shown on the frontend if allowed in the settings. If the “Use WP auto format” setting is set, the content of this field will be passed through the “the\_content” filter, meaning things like shortcodes will be processed.
- Checkbox – a single checkbox that may have one or two values, the second value represents the “unchecked” value for the field.
- Radio Buttons – for showing several choices, only one of which may be selected. This is better than a dropdown for a small number of choices.
- Dropdown List – this is the familiar dropdown control, allowing only one item to be selected at a time. This is better for long lists of options.
- Date Field – this is a field specifically for date values. Dates entered as text will be converted to a UNIX timestamp for storage. You must use this field type if you want date searches and sorts to work correctly.
- Numeric – good for storing numbers, integers only.
- Decimal – allows for numbers with decimals, defaults to 10 places on the left of the point, and 4 to the right. Also uses the configuration values as in the numeric field.
- Currency – allows for numbers with two decimal places, like most currency values. Currency symbols are not allowed, it’s just the number part. Uses the configuration values as in the numeric field.
- Dropdown/Other – this is a special type of dropdown that presents a text field when “other” is selected, allowing for a write-in choice.
- Multiselect Checkbox – this presents a multiple-choice series of checkboxes, any number of which may be selected.
- Radio Buttons/Other – like the Dropdown/Other, only better suited to a few choices because all the options are visible.
- Multiselect/Other – like the Multiselect Checkbox, several choices can be made, plus a write-in choice. Not good for large numbers of choices.
- Link Field – this is a special field for defining a link, it allows the link text to be defined along with the URL. If only the URL is provided, the link text will be the URL.
- Image Upload Field – this provides an upload field for an image file. The allowed types and maximum file size are determined in the plugin settings.
- File Upload Field – this provides a general file upload control. Any file type appearing in the “allowed file types” setting will be accepted as long as it is under the maximum file size. The accepted file types may also be defined on a per-field basis by putting a comma-separated list of allowed file extensions in the “values.”
- Hidden Field – this is generally used to store system information not requiring user input, such as an IP number or user name. It can also be used as a way to add a fixed

value to a record, or as a convenient way to allow client-side java script to add a value to the submission. The values stored in hidden fields can be shown only as "read only" values on the frontend.

- Password Field – this is a special-use field for developers so that a hashed password can be stored with the record. The plugin does not make use of passwords unless custom code has been created to use them.
- CAPTCHA – this provides a simple way to include a human test for your form submissions. There is only one type of CAPTCHA provided with the plugin: one that asks the user to solve a simple randomly generated arithmetic problem. This is adequate spam control for most installations. Stronger spam controls will probably be needed for more popular sites and can be easily implemented by a developer using the API.

## Change the Status of a Record

You should change the status of a record depending on where in the process you are currently.



The screenshot displays the 'Claim Status and Notes' interface. At the top, there is a title 'Claim Status and Notes' and a sub-header 'Claim Status and Notes'. Below this is a rich text editor with a toolbar containing options like Paragraph, Bold (B), Italic (I), Bulleted List, Numbered List, Quote, Indent, Outdent, Link, Unlink, Table, Info, and a right arrow. The editor is currently empty. Below the editor, there is a 'Current Status' dropdown menu. The dropdown is open, showing a list of status options: New (highlighted in blue), Research Record, Locate Claimant, Contact Claimant, Documents Signed, Claim Filed, Claim Denied, Claim Paid, File Closed, Ignore Record, and other. Below the dropdown, there are three buttons: 'Submit', 'Apply', and 'Next'. Below the buttons, there is a legend: 'Submit: save record and return to', 'Apply: save record and continue w', and 'Next: save record and move to the'.

## Record Status and Their Purposes

Each section shows you the records where YOU set the Status matching that Status Name. They are all in the order of how you should proceed with records from importing to the database all the way through closing the file.

When you first import records, the status is set to "NEW" by default. This allows you to easily see which records you have not worked on yet because you have not changed the status. Below is a chart showing you each Status, in order that you should be 'working the records'. It follows a logical, organized path:



## RECORD STATUS / REPORTS AND THEIR PURPOSES

### New Records - No Status

These records have not been worked on (or you forgot to choose a different status when you opened it in Record Details view).

You need to open these one by one and determine the first status (Either Research Record or Ignore Record)

### Research Records

When you set a status to "Research Records", this is meant for you to research the actual record itself (not the property owner, that comes later). You first want to determine is this a state where the lienholders can make a claim against the surplus (such as Florida). If Yes, then you need to locate a means to find out if there are liens and if yes, how much.

*\*\*With the records from TaxAuctionSurplus.com, you also have the benefit of access to all the Property Information reports for records with over \$5k in surplus. There is an online repository where you log in and pull up any Property report. There are also example Property Reports for each county, showing you where to look for the mention of documents that may or may not be liens.*

*If there are documents mentioned, you then need to open the Official Records website for that county and search that document number. Then you can see if it is a lien and how much.*

*Be sure to read our Lien Research Guide!*

For other states, we cannot vouch for how you locate the information. This is up to you to contact the County and ask. The questions you ask:

1. Do liens have a right to the surplus from the tax deed auctions... and if yes,
2. How do I find out if there are liens on this record?

After research on the record, if you decide it is not a good record to continue, set the status to "Ignore Record".

If you decide it IS good, set Status to "Locate Claimant" because that is your next step.

### Locate Claimant

These records are ready to be 'Skip Traced'. You may have your own system for doing so. However, in case you do not nor do you have the means to open an account with professional location service (such as Accurint, TLOxp, or hiring a PI), we have a guide "Skip Trace with Public Records" filled with resources for you to use and tips on searching.

In the database, there are 3 fields on the skip trace screen meant for you to enter good, confirmed information (Address, Phone and Email).

## RECORD STATUS / REPORTS AND THEIR PURPOSES

Once you have good contact information, set the status to "Contact Claimant"

### Contact Claimant

These are the records where the claimant is ready to be contacted. Here is where you will utilize the Database Fields named "Follow Ups".

Keep track of who, when and notes about claimants when they are contacted.

If, during your contact with them, they give a reason that they will not be meeting with you (they already claimed the surplus, etc.), you can set that record to "File Closed".

If during your contact, they are ready for the next step, you can use the "Contact Attempts and Follow Up" table to set the appointment details.

After you have the necessary documents signed, set the status of that record to "Documents Signed".

### Documents are Signed

These records are ready to have the surplus claim filed with the county. Once you file, set status to "Claim Filed"

### Claim Filed with County

These are the records where you have a claim in with the county. You can use this report to track the status with the county.

Once the county pays the claim, set the status to "Claim Paid"

### Claim Paid

These claims are paid but possibly you have not settled with your client yet. Once you are finished with your client, set the status to "File Closed"

### File Closed

All of your closed files (Successful or not, as long as you performed some work on them)

### Ignored Records

## **RECORD STATUS / REPORTS AND THEIR PURPOSES**

All of your ignored records. There may be a point when you want to view these again.

# IMPORTING RECORDS

## Import Records From SurplusDatabase.com

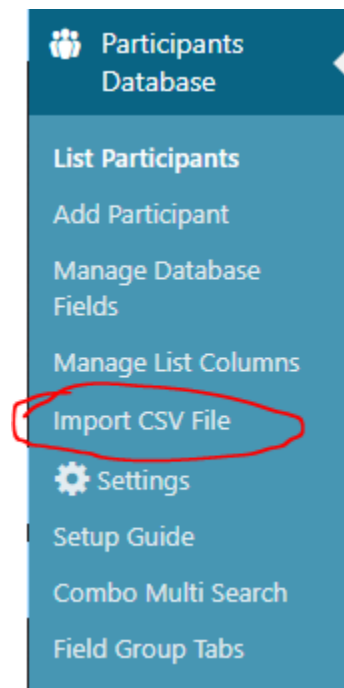
After you obtain each new surplus list from your account on our website, you need to import it into your database online. **Your list will be in a CSV Format. If you open the list to look at it before importing, it's very important that you DO NOT edit the Title/Headers, or your list will not import into the database.**

### Import your Spreadsheet

Follow these steps to bring those records into your database.

**STEP 1: Make sure the Surplus File that you downloaded from us is closed.**

**STEP 2: Click Import CSV File**



### STEP 3: Make sure all these settings are in place:

Upload the .csv file

Enclosure character:  Delimiter character:

Duplicate Record Preference:

Duplicate Record Check Field:

Note: Depending on the "Duplicate Record Preference" setting, imported records are checked against existing records by the field set in the "Duplicate Record Check Field" setting. If a record matching an existing record is imported, one of three things can happen, based on the "Duplicate Record Preference" setting:

**Current Setting: DON'T IMPORT does not import the new record if it matches the Record ID of an existing one.**

Choose .csv file to import:  No file chosen

The "Duplicate Record" settings are important. This will stop you from accidentally importing the same set of records twice. If you try to do so, the database will recognize that the "Private ID" on the sheet you are importing are duplicates of records that are already in the database and it will not import them again

### STEP 4: Click the Browse Button and locate the Surplus File on your computer, select it and click Open

then upload it here.

Exported CSV files should be comma-delimited

Upload the .csv file

Enclosure character:  Delimiter character:

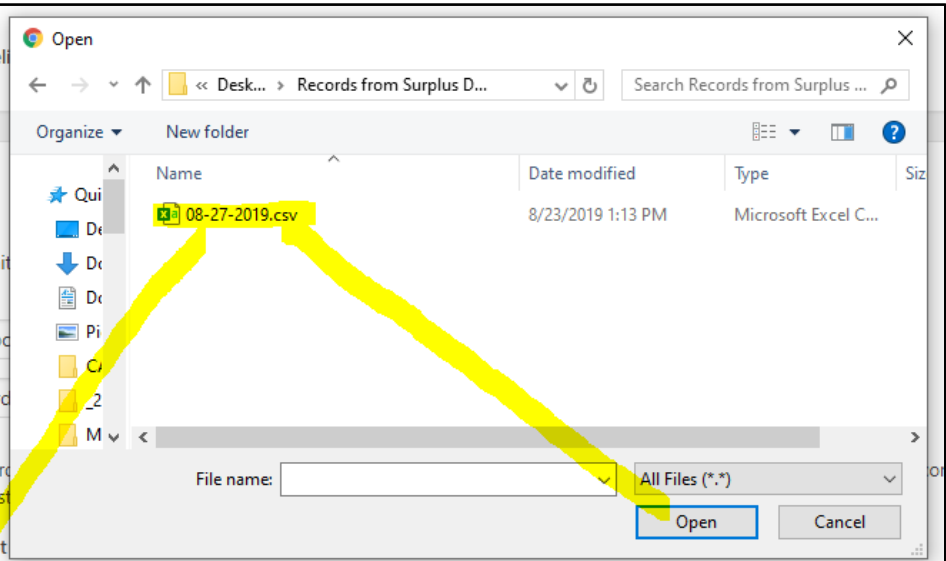
Duplicate Record Preference:

Duplicate Record Check Field:

Note: Depending on the "Duplicate Record Preference" setting, imported records are checked against existing records by the field set in the "Duplicate Record Check Field" setting. If a record matching an existing record is imported, one of three things can happen, based on the "Duplicate Record Preference" setting:

**Current Setting: DON'T IMPORT does not import the new record if it matches the Record ID of an existing one.**

Choose .csv file to import:  No file chosen



The image shows a file explorer window titled "Open" with the path "Records from Surplus D...". The file "08-27-2019.csv" is selected and highlighted in yellow. A yellow arrow originates from the "Choose File" button in the background application and points to the selected file. The file explorer shows columns for Name, Date modified (8/23/2019 1:13 PM), Type (Microsoft Excel C...), and Size.

**STEP 5: You can see it has the correct file and then you click the "Upload File" button**

**Upload the .csv file**

Enclosure character  Delimiter character

Duplicate Record Preference:

Duplicate Record Check Field:

Note: Depending on the "Duplicate Record Preference" setting, imported records are checked "Duplicate Record Check Field" setting. If a record matching an existing record is imported, one of three things can happen:

Current Setting: **DON'T IMPORT** does not import the new record if it matches the *SD Record ID* field.

Choose .csv file to import:  08-27-2019.csv

**It does not take very long and you will then see at the top that it was added**

**Surplus Database**

Import CSV File

The file 08-27-2019.csv has been uploaded.

New columns imported from the CSV file.

3 records added

**IMPORT SUCCESSFUL!**

Now if you click back to "List Records" and choose "Show Only records with "Current Status" "New", you can see the new records you imported.

The screenshot shows the 'Surplus Database' interface. At the top, there is a 'List Records' section. Below it, a filter is applied: 'Show only records with: Current Status' that 'contains' 'New'. There are 'Filter' and 'Clear' buttons, and a counter showing 'Number of filters to use: 1'. Below the filter, the 'Sort by:' section is set to 'Date Updated' with 'Descending' order selected. The results section shows '3 records found, sorted by: Date Updated.' Below this, there are controls for 'With selected: delete' and 'Apply', and 'Show 10 items per page. Change'. The main table displays three records with columns: ID, Current Status, Surplus, State, County, and Tax.

ID	Current Status	Surplus	State	County	Tax
8620	New	5,048.66	FL	Charlotte County	19-
8619	New	172,713.15	FL	Bay County	20-
8618	New	114,244.89	FL	Bay County	20-

Please note, if you have other records in your database that you have not yet worked on or changed the status, then those will still appear here as well

## **Import Records From Other Sources**

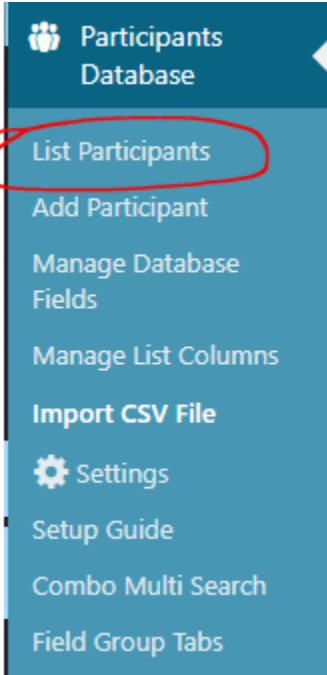
1. We have 2 blank import sheets for your use. One if for Tax Deed Surplus Records, the other is for Mortgage Surplus records.
2. Choose the correct one and copy your data into the correct fields and save. Make sure it is still saved as a CSV!
3. Follow the same instructions as above, importing records from into the database

VERY IMPORTANT! If you have added custom fields into your database, you will need to add those fields onto these templates.

[Download Tax Deed Surplus Template](#)

[Download Mortgage Surplus Template](#)





# EXPORTING RECORDS

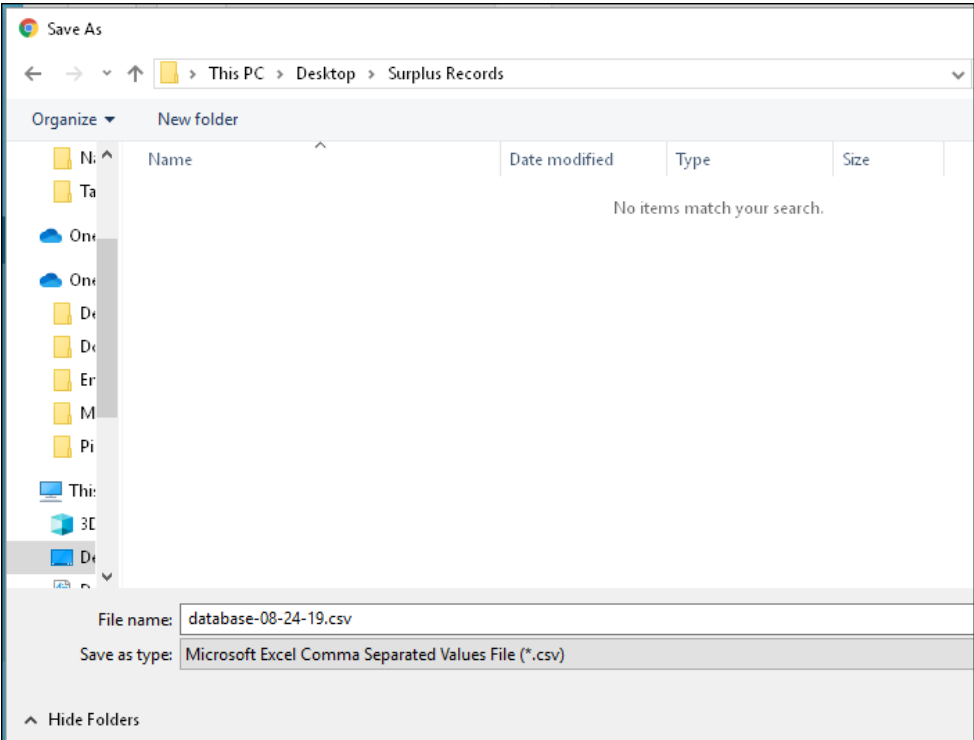
You can Export all records to a CSV File.

**STEP 1:** Click "List Participants" on the menu

**STEP 2:** Scroll to the bottom, Type in a File Name, Check Box to Include Field Titles (if desired) and click "Download CSV for this list". Save on your computer.

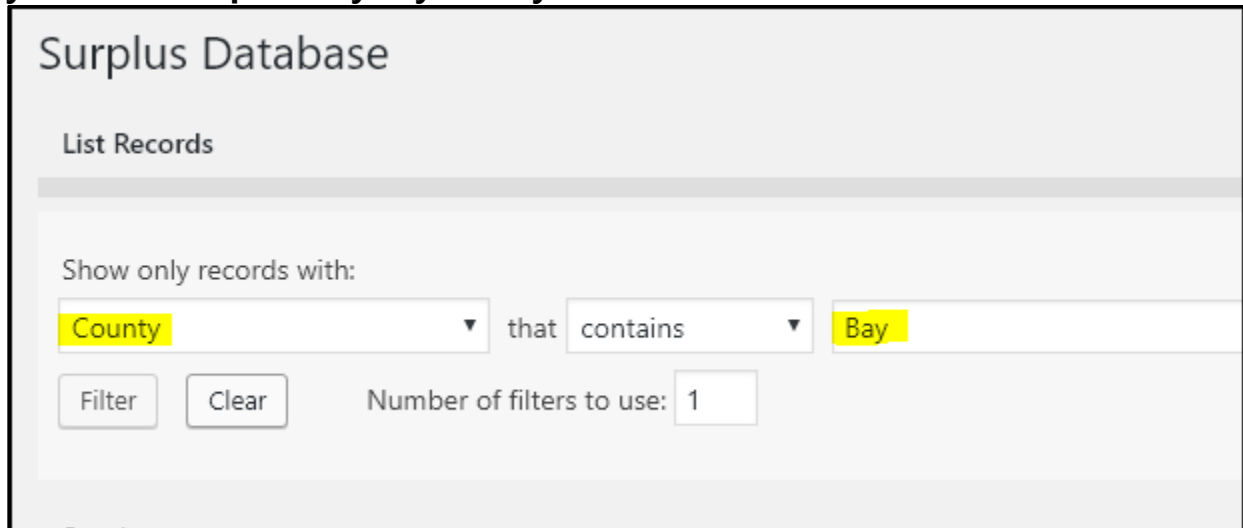
**Export CSV**

File Name:    Include field titles



## Export only Particular Records

If you want to export only certain records, perform a Filter first. For example, if you want to export only Bay County...



Surplus Database

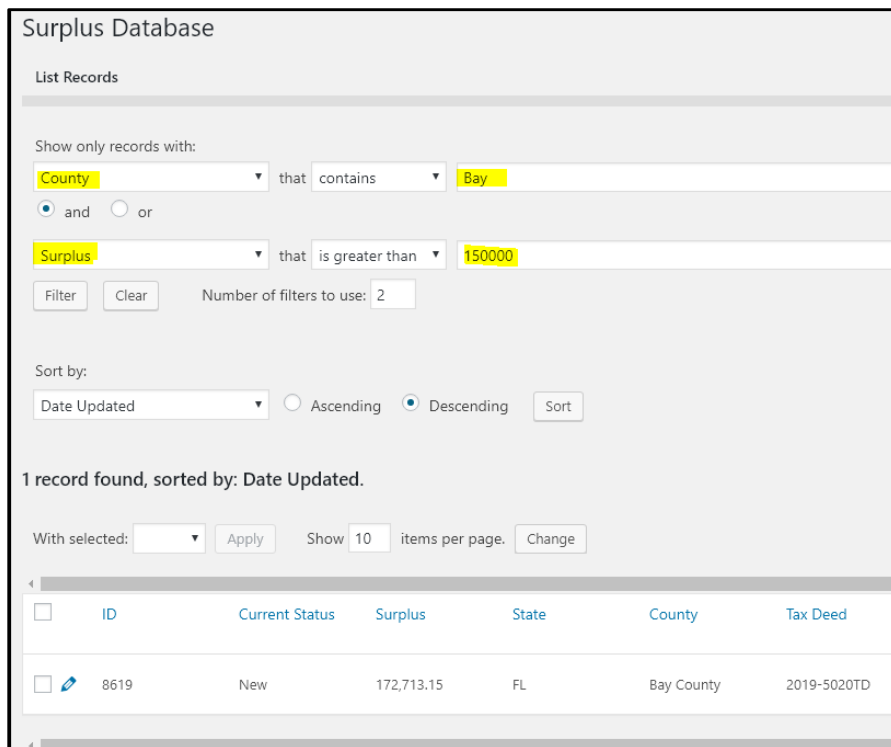
List Records

Show only records with:

County that contains Bay

Filter Clear Number of filters to use: 1

**Advanced Filter:** For example, if you want to export only Bay County AND the surplus is over \$150,000 (Do not use commas or symbols)



Surplus Database

List Records

Show only records with:

County that contains Bay

and  or

Surplus that is greater than 150000

Filter Clear Number of filters to use: 2

Sort by:

Date Updated  Ascending  Descending Sort

1 record found, sorted by: Date Updated.




With selected: Apply Show 10 items per page. Change

ID	Current Status	Surplus	State	County	Tax Deed
<input type="checkbox"/> 8619	New	172,713.15	FL	Bay County	2019-5020TD

# WORKING WITH A RECORD

For any record on which you want to work, click the Edit Icon next to that record

With selected:   Show  items per page.

<input type="checkbox"/>	ID	Current Status	Surplus	State
<input type="checkbox"/> 	8620	New	5,048.66	FL
<input type="checkbox"/> 	8619	New	172,713.15	FL
<input type="checkbox"/> 	8618	New	114,244.89	FL

## Record Groups

You are presented with tabbed pages, one for each "Group". A Group is a set of fields we put together because they are related.

Edit Existing Surplus Record

*Record Info*

ID

SD Record ID

Date Recorded read only

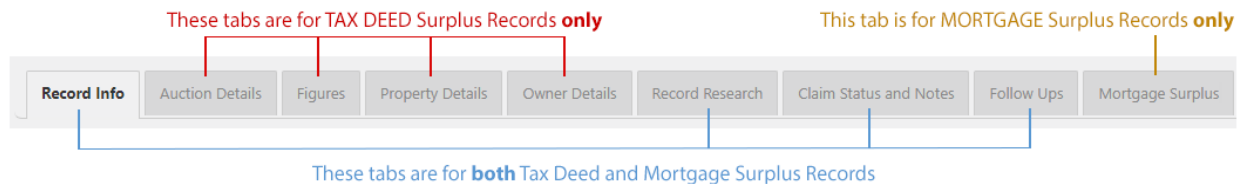
Date Updated read only

Last Accessed read only

Save the Record

## The Groups are:

Record Info, Auction Details, Figures, Property Details, Owner Details, Record Research, Claim Status and Notes, Follow Ups, Mortgage Surplus



## Fields within the Groups

The highlighted fields are already populated when you import the records from SurplusDatabasePro.com or TaxAuctionSurplus.com

- Record Info (These fields are generated by actions performed)
  - ID
  - Record ID
- Auction Details
  - 
  - Surplus Type
  - State
  - County
  - Auction Date
  - Results Date
  - Week Number
  - Search ID
  - Private ID
  - Auction Notes
- Figures
  - Surplus
  - Starting Bid
  - Ending Bid
  - Notes About Figures
- Property Details
  - Tax Deed
  - Parcel Number
  - Physical Address 1
  - Physical Address 2

- Physical City
- Physical State
- Physical Zip
- Homestead
- Property Notes
- Owner Details
  - Owner Name
  - Owner Address 1
  - Owner Address 2
  - Owner City
  - Owner State
  - Owner Zip
  - Owner Research and Notes
  - Owner Verified Phone
  - Owner Verified Email
  - Owner Verified Address
- Record Research (**Available only with SurplusDatabasePro.com Subscription**)
  - There ARE Liens on this record (True or False)
  - Lien Claim Deadline (Set at 210 days after the date of the auction. Why 210 Days?\*\*)
  - Has Governmental Liens (True or False)
  - Governmental Liens (Lists Book/Page #'s and Amount of Lien)
  - Has Mortgage(s) (True or False)
  - Mortgage Documents (Lists Book/Page #'s, Original Amount, Mortgage Date and Lender)
  - Has Judgments (True or False)
  - Judgments (Lists Book/Page #'s, Date, Amount and Lien Holder – Could be obtained as client)
  - Has HOA or COA Liens (True or False)
  - HOA Liens (Lists Book/Page #'s, Amount of Lien)
  - Has Other or Unknown Liens (True or False)
  - Other Liens (Lists any info we can find)
  - Notes About Research (We may or may not have notes on each record)
  - Has Federal Lien (True or False)
  - Federal Liens (Lists Book/Page #'s, Amount of Lien – Federal Liens never expire)
- Claim Status and Notes
  - Claim Status and Notes (Text Area for you to type in your notes)
  - Current Status (Drop Down Box for you to change the status on records – the default status upon import is “New”)
- Follow Ups (Five Date and Description fields for you to track your tasks)
  - Follow Up Date 1
  - Follow Up Description 1
  - Follow Up Date 2

- Follow Up Description 2
- Follow Up Date 3
- Follow Up Description 3
- Follow Up Date 4
- Follow Up Description 4
- Follow Up Date 5
- Follow Up Description 5
- Mortgage Surplus
  - MTG Private ID
  - MTG Status
  - MTG Sold Amount
  - MTG Surplus
  - MTG Assessed Value
  - MTG Plaintiff Max Bid
  - MTG County
  - MTG Auction Date
  - MTG Case Number
  - MTG Primary Plaintiff
  - MTG Property Address
  - MTG Property City
  - MTG Property Zip
  - MTG Parcel Number
  - MTG Our Comments
  - MTG Final Judgment Amount
  - MTG Owner Name
  - MTG Owner Address
  - MTG Owner Address 2
  - MTG Owner City
  - MTG Owner State
  - MTG Owner Zip

## DELETE RECORDS UNDER CERTAIN \$ AMOUNT

We realize you may not want to work with surplus records under a certain amount, ever. You can quickly clean out records under the amount you choose.

**You are deleting records from your database and you cannot get them back.**

We produce surplus records where the surplus is \$1,000 and above. If, for example, you positively know you will never work with anything under \$7,000, here is what to do:

### STEP 1: Filter your List of Records so only those less than \$7,000 show

### Surplus Database

List Records

Show only records with:

Surplus that is less than 7000

Filter Clear Number of filters to use: 1

### Look at your Filtered List and be sure those are the records you want to get rid of:

1 record found, sorted by: Date Updated.


With selected:  Apply Show 10 items per page. Change

<input type="checkbox"/>	ID	Current Status	Surplus	State	County	Tax Deed	Parcel Number
<input type="checkbox"/>	8620	New	5,048.66	FL	Charlotte County	19-0654	402204305001

Step 2: Check the box at the top left of the list. This will check ALL of the records on the Filtered List. Choose "Delete" on the drop down and then Click "Apply". You will be asked if you are sure, Choose Yes.

1 record found, sorted by: Date Updated.

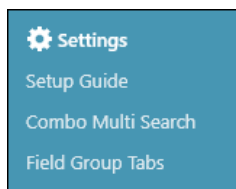
With selected: delete ▼ Apply Show  items per page. Change

<input checked="" type="checkbox"/>	ID	Current Status	Surplus	State
<input checked="" type="checkbox"/> 	8620	New	5,048.66	FL



## OTHER ITEMS

The Surplus Database was created, based on a WordPress Plugin called 'Participants Database'. There are a few more items on your menu. We highly recommend you do not change anything here unless you really know what you are doing.



## PROTECTING YOUR DATABASE AND WEBSITE FILES

We set up a system to create a backup of your Surplus Database and Records every morning at 1:00 a.m. EST. At any point, if for any reason your database gets messed up, you can request that we restore the most recent backup.

Please Note, the backups do not cover your website pages and images. If you accidentally delete pages or images, we will need to manually re-create them. You have to submit a Help Desk Ticket and there is a fee involved. We recommend instead of deleting pages you do not want, you "unpublish" them instead. That way, they are still there but not viewable by your website visitors.

In edit mode of the page, choose Edit, next to "Published". In the drop-down, choose "Draft" and "OK". Then be sure to click "Update" to save the page. To restore this page, simply do the reverse: Change it to "Published".

