

Business partners such as Brokers need to use the [Order Appraisals link](#) to order AVMs and Appraisal prior to submitting loan files to Button Finance.

This document will show you how to:

1. How to sign-up through TriServe with Button Finance as your Lender
2. How to order an AVM
3. How to order an Appraisal
4. How to input customer payment information

How Brokers Register to Order AVMs and Appraisals

1. Click on [Broker Portal](#) to be taken to our secure site
2. Click on [Order Appraisals](#)
3. Review the appraisal requirements and guidelines to determine what product you will start-out with
4. Click on “*here*” from the Broker Portal

You can order your Appraisal [here](#)

5. You will be directed to the [Lender sign-up form at TriServ](#)

6. Complete the Lender sign-up form as pictured below. Ensure the highlighted fields are completed as shown in this screen and click Sign-up.

User Type
Broker

Full Name
Test Broker

Company Name
Testing a Broker for Button Finance

Company Address
521 Broadway, 4th Floor

Suite/Building/Apt

City
New York

State
NY

Zip
10012

Company Phone
707-515-0576

Direct Phone
707-515-0576

Email Address
josh@buttonfinance.com

Referral Company/Lender
Button Finance

Level of Access
Ordering

Timeframe to submit an Order
Immediately

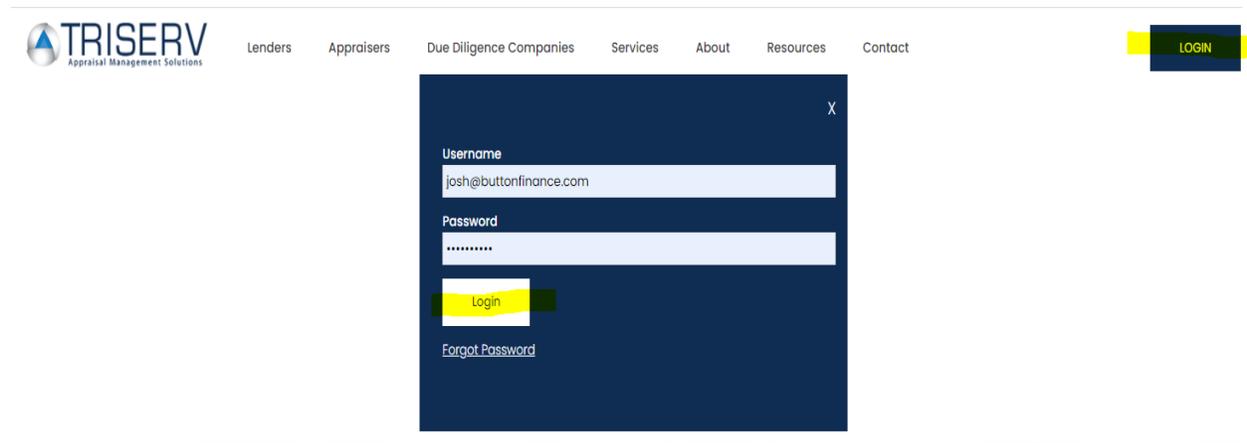
I'm not a robot 
reCAPTCHA
Privacy - Terms

Sign-Up

7. Once this request has been submitted, completion of account set-up will take 24 hours.

Ordering AVM

8. Once you have received your account creation email you can bookmark TriServe log-in by clicking [here](#).
9. Click on Log-in and a pop-up window will appear, input your credentials and click log-in



The screenshot shows the TriServe website header with navigation links: Lenders, Appraisers, Due Diligence Companies, Services, About, Resources, and Contact. A yellow 'LOGIN' button is highlighted in the top right corner. A dark blue modal window is open in the center, containing a login form with the following fields and elements:

- Username:
- Password:
- Login button:
- Forgot Password link: [Forgot Password](#)

10. Once you've clicked log-in, click on Order An Appraisal at the top of the screen



The screenshot shows the TriServe website navigation bar. The TriServe logo is on the left. On the right, there is a dark blue bar with white text links: [Price An Appraisal](#) | [Order An Appraisal](#) | [Password Change](#) | [Logout](#) |

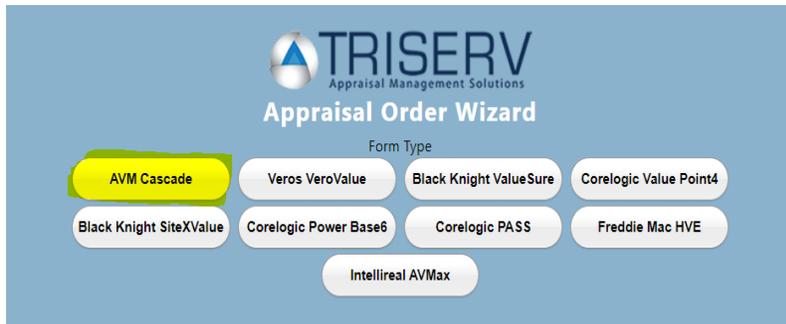
11. The *Appraisal Order Wizard* will pop-up, choose Special Products>Valuation



12. Click AVM



13. Choose AVM Cascade



TRISERV
Appraisal Management Solutions
Appraisal Order Wizard

Form Type

AVM Cascade

Veros VeroValue

Black Knight ValueSure

Corelogic Value Point4

Black Knight SiteXValue

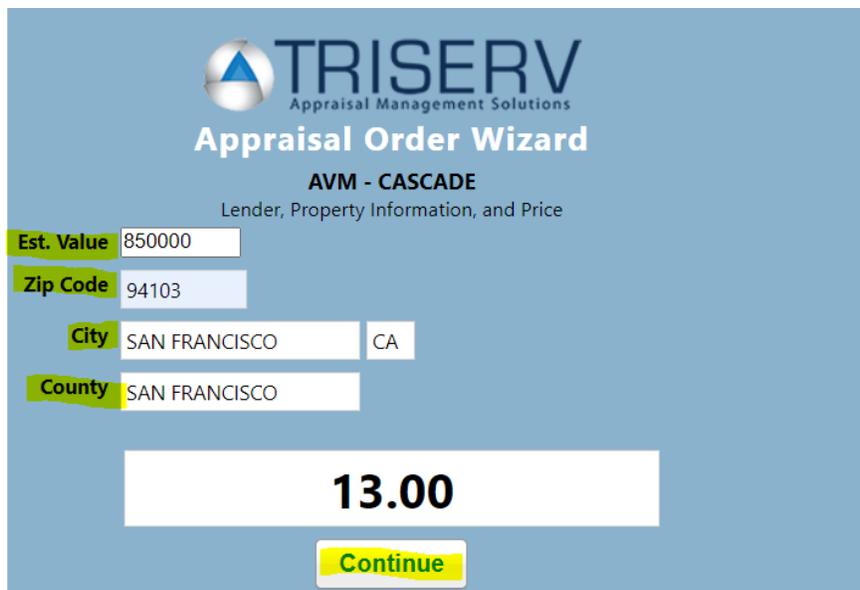
Corelogic Power Base6

Corelogic PASS

Freddie Mac HVE

Intellireal AVMax

14. Enter in all the information below and click Continue. Note: A price will appear and click continue, disregard the pricing.



TRISERV
Appraisal Management Solutions
Appraisal Order Wizard
AVM - CASCADE
Lender, Property Information, and Price

Est. Value 850000

Zip Code 94103

City SAN FRANCISCO CA

County SAN FRANCISCO

13.00

Continue

Completing the Appraisal Order Form for AVM

15. An appraisal order form window will open. Leave Loan Number and Case No blank

APPRAISAL ORDER FORM	
Loan Number	FHA Case No.
<small>Note: If a loan number has not yet been assigned, please leave Loan Number blank.</small>	<small>Note: If you have the three digit ADP code, please include it in the case number. If this is a USDA or RD order, please enter "USDA" or "RD" respectively.</small>

16. Confirm the Broker|Originating Firm Section of the window to match you as the ordering Broker

Broker | Originating Firm

First Name	Mortgage
Last Name	Broker LO
Company	Test Broker
Address	123 Main Street
Address	
City	Volente TX
Zip	78641
Phone	555-555-5555
Fax	
Email	josh@buttonfinance.com

17. Confirm the Lender|Client Section matches that of Button Finance.

Lender | Client

First Name	<input type="text" value="Appraisal Desk"/>
Last Name	<input type="text" value="Button Finance, Inc."/>
Company	<input type="text" value="Button Finance, Inc."/>
Address	<input type="text" value="16201 Dodd Street"/>
Address	<input type="text" value="Unit #4"/>
City	<input type="text" value="Volente"/> <input type="text" value="TX"/> ▼
Zip	<input type="text" value="78641"/>
Phone	<input type="text" value="877-828-8866"/>
Fax	<input type="text"/>
Email	<input type="text" value="appraisals@buttonfinance.com"/>

18. Enter in any additional staff that you want to receive the report under Production Staff/Contacts. Note: Button Appraisals will receive a copy of the report once ordered automatically.

Production Staff / Contacts

Receive Updates and Documents

Contact Name #1	<input type="text" value="Josh Hager"/>
Contact Email #1	<input type="text" value="josh@buttonfinance.com"/>

Receive Documents Only

Contact Name #1	<input type="text"/>
Contact Email #1	<input type="text" value="josh@buttonfinance.com"/>

19. Complete the property information with the subject property address.

For AVMs on Primary Residence properties, indicate the property address is the same as borrower address.

Ensure Occupancy = Valuation

Ensure Purpose = Refinance

PROPERTY INFORMATION

Property Address Same as Borrower Address

Address	<input type="text" value="1039 Broadview St"/>
Address	<input type="text"/>
City	<input type="text" value="Austin"/> TX <input type="text" value=""/>
Zip	<input type="text" value="78723"/>
County	<input type="text"/>
Occupancy	<input type="text" value="Primary Residence"/>
Purpose	<input type="text" value="Refinance"/>
Lat, Lng.	<input type="text" value=""/>

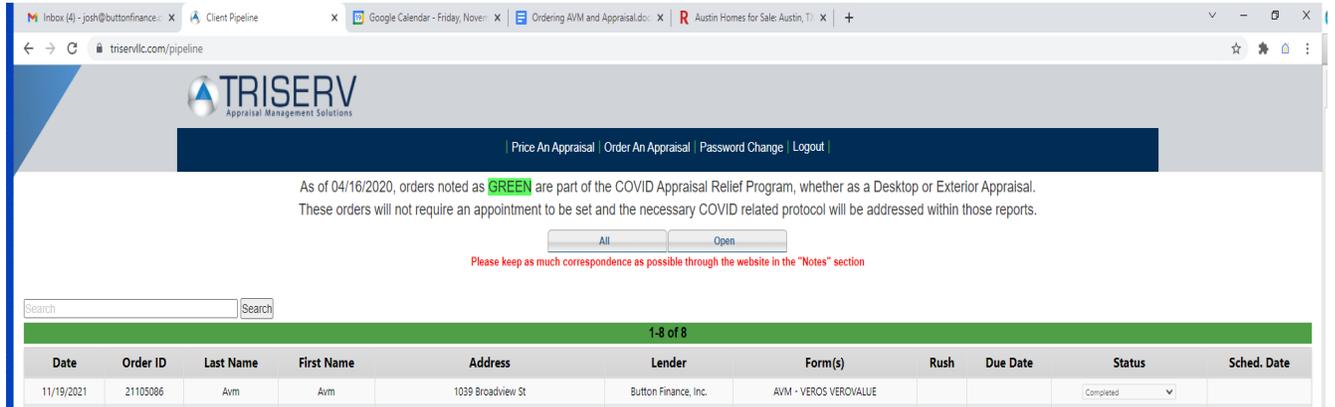
20. Click submit order

CONFIRM ORDER

Submit Order

Restart Wizard

21. Once you click submit you will be returned to your pipeline screen, and you will see the below screen:



TRISERV
Appraisal Management Solutions

Price An Appraisal | Order An Appraisal | Password Change | Logout

As of 04/16/2020, orders noted as **GREEN** are part of the COVID Appraisal Relief Program, whether as a Desktop or Exterior Appraisal. These orders will not require an appointment to be set and the necessary COVID related protocol will be addressed within those reports.

[All](#) [Open](#)

Please keep as much correspondence as possible through the website in the "Notes" section

Search

1-8 of 8

Date	Order ID	Last Name	First Name	Address	Lender	Form(s)	Rush	Due Date	Status	Sched. Date
11/19/2021	21105086	Avm	Avm	1039 Broadview St	Button Finance, Inc.	AVM - VEROS VERCOVALUE			Completed	

Status in the far right will show either as New or Completed.

New = Incomplete

Completed = Means report is ready.

Typically it takes about 5 minutes for the order to run through the system and complete.

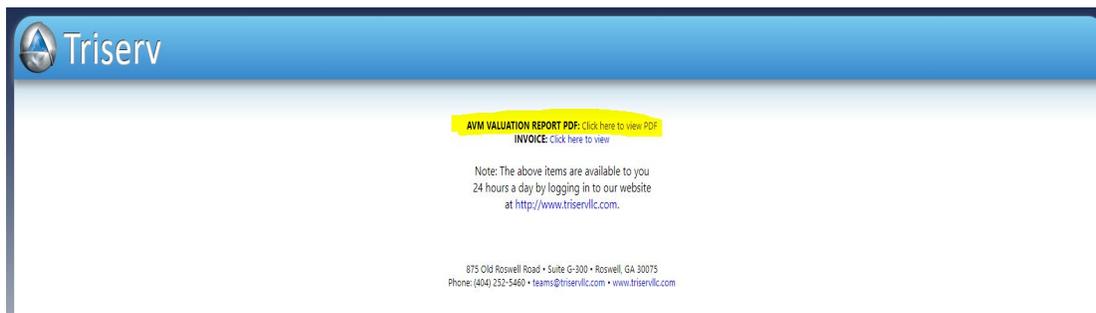
Once complete you will receive an email from TriServe the the Click Here link:

Triserv AVM Order #21105086 (Address: 1039 BROADVIEW ST) has been Completed and Uploaded

 **Triserv Appraisal Management** <conditions@triservllc.com> to appraisals ▾ 1:30 PM (9 minutes ago) ☆ ↶ ⋮

AVM Email Confirmation - Please [CLICK HERE](#) to view/download the AVM for 1039 Broadview St Austin, TX

22. Click on the on the “Click here to view PDF” to be taken to the completed AVM.



Triserv

AVM VALUATION REPORT PDF: [Click here to view PDF](#)

INVOICE: [Click here to view](#)

Note: The above items are available to you 24 hours a day by logging in to our website at <http://www.triservllc.com>.

675 Old Roswell Road • Suite G-300 • Roswell, GA 30075
Phone: (404) 252-5460 • teams@triservllc.com • www.triservllc.com

23. After clicking on the link you will be directed straight to the AVM, whichever AVM appears from the cascade model ensures that you are using the “*Estimated Market Value,*” to calculate the CLTV.

If the CLTV is $\leq 85\%$ from the AVM Value and/or APOR $> 3.5\%$ a full appraisal will need to be ordered. See the steps below on how to order an appraisal. Ensure you see the appraisal guidelines on the website to ensure you’re ordering the correct appraisal.

Ordering the appraisal

24. Repeat Step 9 from *Ordering AVM* to log-in

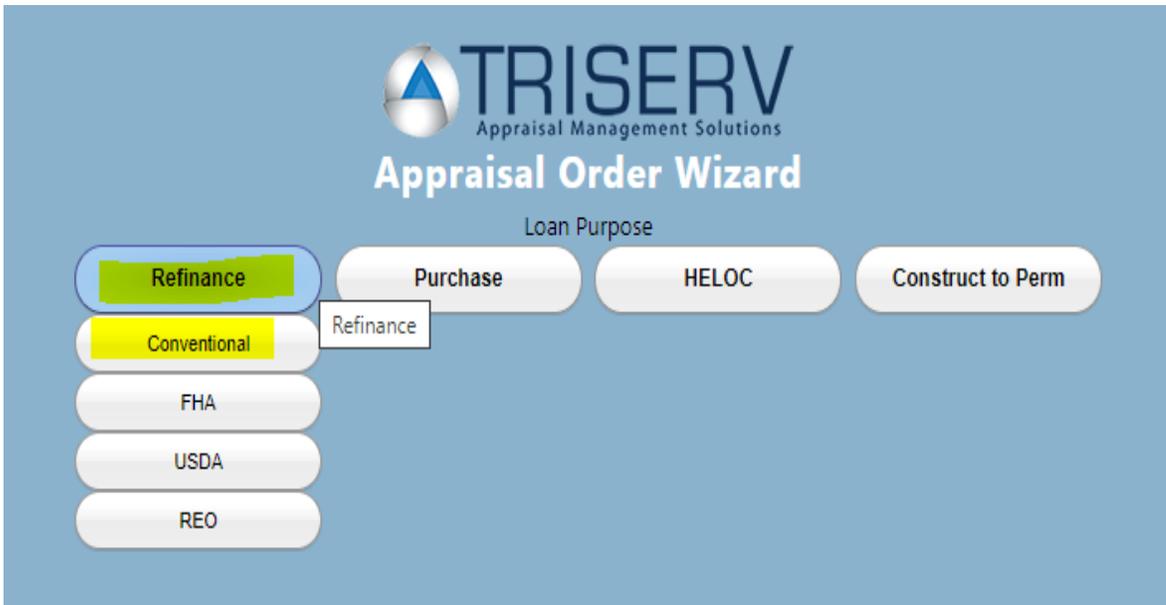
25. Click Order an Appraisal



26. Click new appraisal>Choose Occupancy Type



27. Choose Loan Purpose>Conventional



TRISERV
Appraisal Management Solutions
Appraisal Order Wizard

Loan Purpose

Refinance Purchase HELOC Construct to Perm

Conventional FHA USDA REO

28. Choose Form Type>Report Number



TRISERV
Appraisal Management Solutions
Appraisal Order Wizard

Form Type

Full Exterior Only

SFR 1004 Condo 1073 2-4 Multi 1025 Manufactured 1004C Co-Op 2090 Vacant Land/Lot

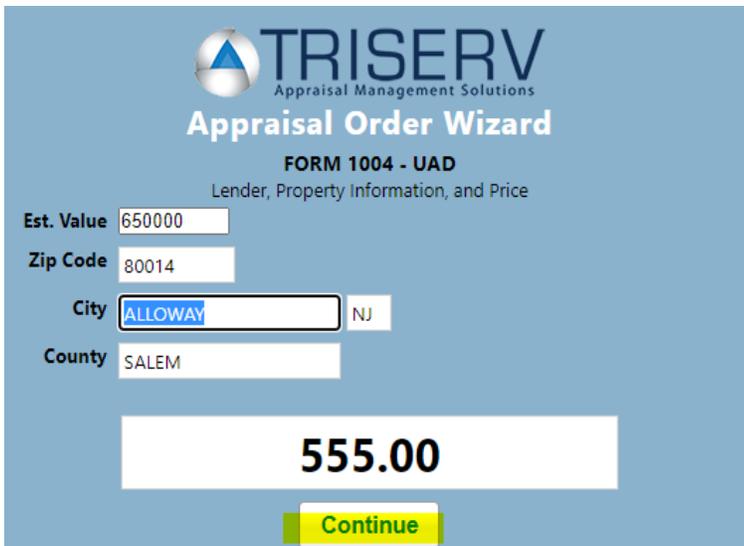
Note: All reports not highlighted are ineligible properties for financing at Button Finance, Inc.

29. Choose *Standard 1004*



The screenshot shows the TRISERV Appraisal Order Wizard interface. At the top, the TRISERV logo and 'Appraisal Management Solutions' are displayed. Below the logo, the title 'Appraisal Order Wizard' is centered. Underneath, the text 'Form Type' is shown. Three buttons are visible: 'Standard 1004' (highlighted in yellow), 'HomeStyle', and 'Subject To 1004'.

30. Complete the Appraisal Wizard Screen for pricing>Click Continue



The screenshot shows the TRISERV Appraisal Order Wizard pricing screen. The TRISERV logo and 'Appraisal Management Solutions' are at the top. Below the logo, the title 'Appraisal Order Wizard' is centered. Underneath, the text 'FORM 1004 - UAD' and 'Lender, Property Information, and Price' are displayed. The form contains the following fields:

- Est. Value: 650000
- Zip Code: 80014
- City: ALLOWAY NJ
- County: SALEM

A large white box displays the pricing of **555.00**. Below the pricing box, a yellow 'Continue' button is visible.

Note: Button Finance is set-up for state pricing, therefore, please check the spreadsheet to ensure you are getting the correct pricing for the appraisal. Disregard this screen.

31. Repeat Steps 15-18 in Ordering an AVM

32. Complete the Borrower Information Section with the Borrower and Co-Borrower information if applicable

BORROWER INFORMATION			
Primary Borrower		Co-Borrower	
First Name	<input type="text" value="Borrower"/>	First Name	<input type="text" value="Repeat like Borrower side if present"/>
Last Name	<input type="text" value="#1"/>	Last Name	<input type="text"/>
Address	<input type="text" value="123 Main St"/>	Address	<input type="text"/>
Address	<input type="text"/>	Address	<input type="text"/>
City	<input type="text" value="Alloway"/> <input type="text" value="NJ"/>	City	<input type="text"/> <input type="text"/>
Zip	<input type="text" value="80014"/>	Zip	<input type="text"/>
Phone (H)	<input type="text" value="555-555-5555"/>	Phone (H)	<input type="text"/>
Phone (W)	<input type="text" value="555-555-5555"/>	Phone (W)	<input type="text"/>
Phone (C)	<input type="text" value="555-555-5555"/>	Phone (C)	<input type="text"/>
County	<input type="text" value="Morris"/>	County	<input type="text"/>
Email	<input type="text" value="borrower@gmail.com"/>	Email	<input type="text"/>

33. Choose contact for entry to property for the appraiser

CONTACT / ACCESS INFORMATION		
Contact for Entry Same as Borrower <input type="checkbox"/>	Contact for Entry Same as Co-Borrower <input type="checkbox"/>	Co-Contact for Entry Same as Co-Borrower <input type="checkbox"/>

34. Complete Assignment Information: Enter Loan Amount and Choose Requested Delivery Date to be in 7 business days. Leave Investor blank.

ASSIGNMENT INFORMATION			
Loan Amount	<input type="text" value="295,237"/>	Requested Delivery Date	<input type="text" value="12/01/2021"/>
Est. Value	<input type="text" value="650000"/>		
Investor:	<input type="text"/>		
Form(s)	<input type="text" value="FORM 1004 - UAD"/>		

35. Include any notes you feel are pertinent to TriServ regarding your order

SPECIAL NOTATIONS AND INSTRUCTIONS

***Please note: If requesting a "rush", please provide a "need by" date.**



36. Upload any additional documentation for the appraiser if you feel you need to provide additional information to support value or any deferred maintenance that might be identified by the appraiser

ATTACH DOCUMENTS

Example: Sales Contract, Credit Card Authorization, Survey, etc.

Choose File	No file chosen

37. Click Submit Order

CONFIRM ORDER

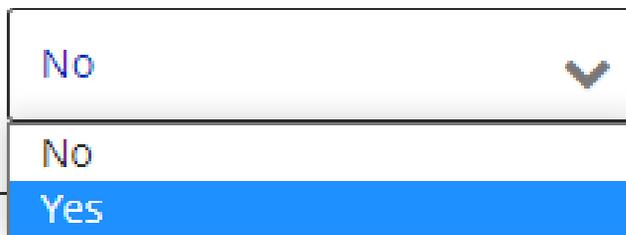
Submit Order

Restart Wizard

Submit a Standalone Home Equity Loan with a Co-Borrower for 24 Hour turn-time

1. Repeat steps 1-5
2. Choosing Co-Borrower: Choose yes in the drop down

Is there a Co-Borrower? *



No

No

Yes

3. Repeat steps 6-10 from Submitting a Standalone Home Equity Loan for 24 Hour turn-time w/No Co-Borrower

4. Choosing Borrower/Co-Borrower Employment Status and Upload Docs

Borrower Employment Status *

Does Borrower have VOIE? *

Borrower's VOIE (The Work Number or Equivalent) *

Co-Borrower Employment Status *

Co-Borrower's Latest 2 Years 1040 *

Co-Borrower's Latest 2 Years Business Tax Returns *

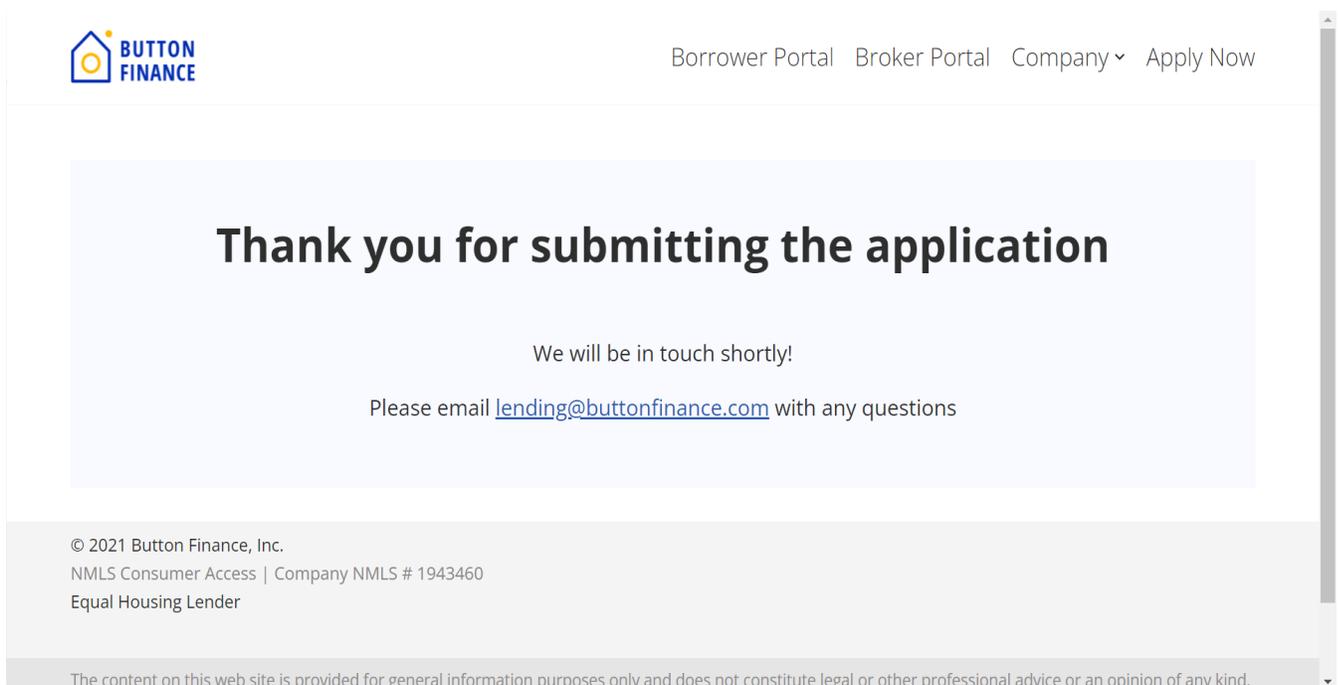
Co-Borrower's YTD P&L *

Co-Borrower's Latest Balance Sheet *

Co-Borrower's Latest 3 Months Business Bank Statements *

NOTE: Same here applies when the VOIE is available, or not available from Submitting a Standalone Home Equity Loan for 24 Hour turn-time w/No Co-Borrower in Step 12-15

5. Repeat Steps 16-17 from Submitting a Standalone Home Equity Loan for 24 Hour turn-time w/No Co-Borrower
6. Once uploaded you will be directed to the Thank You Screen below



The screenshot shows the Button Finance website interface. At the top left is the Button Finance logo. At the top right are navigation links: "Borrower Portal", "Broker Portal", "Company" (with a dropdown arrow), and "Apply Now". The main content area features a light blue background with the text "Thank you for submitting the application" in a large, bold, black font. Below this, it says "We will be in touch shortly!" and "Please email lending@buttonfinance.com with any questions". At the bottom left, there is a footer with the text: "© 2021 Button Finance, Inc. NMLS Consumer Access | Company NMLS # 1943460 Equal Housing Lender". At the bottom right, there is a small disclaimer: "The content on this web site is provided for general information purposes only and does not constitute legal or other professional advice or an opinion of any kind."

Submit a Standalone Home Equity Loan for One-Touch Underwrite

1. Repeat all steps above whether submitting a loan with just a borrower or borrower+ co-borrower.

2. Continue down to the section titled Required Documentation for One-Touch Underwrite click Select File on all applicable documentation to your file. Here not all docs are required, only the one's the apply to your loan scenario.

Required Documentation for One-Touch Underwrite

For Standalone Transactions

Most Recent Statement for Mortgages and any Additional Liens on Subject Property

Select File

Homeowners' Insurance Policy

Select File

Flood Certification / Insurance, if applicable

Select File

Other Documents (as applicable)

Borrower Citizenship Documents (Passport, Visa, Green Card) (for non-US citizens only)

Select File

Most Recent Statements of Mortgages / Liens on Other Real Estate Owned

Select File

Latest homeowner's association statement, if applicable

Select File

Completed homeowner's association questionnaire, if condo

Select File

AUS DU / LP Findings, if available

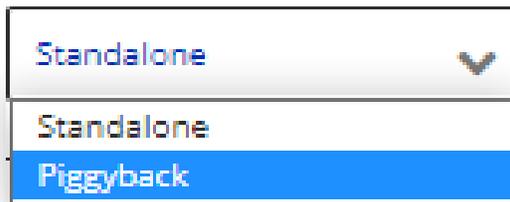
Select File

3. Repeat Steps 16-17 from Submitting a Standalone Home Equity Loan for 24 Hour turn-time

Submit a Piggyback Home Equity Loan for One-Touch Underwrite

1. Repeat steps 1-3 from top of handout
2. Complete Loan Type, be sure to choose Piggyback to see requirements

Loan Type *



A dropdown menu for 'Loan Type' is shown. The current selection is 'Standalone', indicated by a small downward arrow. The menu is open, showing two options: 'Standalone' and 'Piggyback'. The 'Piggyback' option is highlighted with a blue background.

3. Complete 1st Mortgage Lender Name

1st Mortgage Lender Name *



An empty text input field for '1st Mortgage Lender Name'.

4. Repeat steps 6-15 for Submitting a Standalone Home Equity Loan for 24 Hour turn-time
5. Continue down to the section titled Required Documentation for One-Touch Underwrite click Select File on all applicable documentation to your file. Here not all docs are required, only the one's the apply to your loan scenario.
6. Continue down to the section titled Required Documentation for One-Touch Underwrite click Select File on all applicable documentation to your file. Here not all docs are required, only the one's the apply to your loan scenario.

Required Documentation for One-Touch Underwrite

For Piggyback Transactions

Completed 1003

Select File

Completed 1008

Select File

Fully-executed Purchase Agreement and All Addenda

Select File

First Mortgage Approval Letter

Select File

Appraisal Supporting Estimated Value / Purchase Price

Select File

Title and Lien Report

Select File

Other Documents (as applicable)

Borrower Citizenship Documents (Passport, Visa, Green Card) (for non-US citizens only)

Select File

Most Recent Statements of Mortgages / Liens on Other Real Estate Owned

Select File

Latest homeowner's association statement, if applicable

Select File

Completed homeowner's association questionnaire, if condo

Select File

AUS DU / LP Findings, if available

Select File

7. Repeat Steps 16-17 from Submitting a Standalone Home Equity Loan for 24 Hour turn-time