



SmartSAFE®

DocMagic's Proprietary  
eVault Solution

# SmartSAFE® eVault

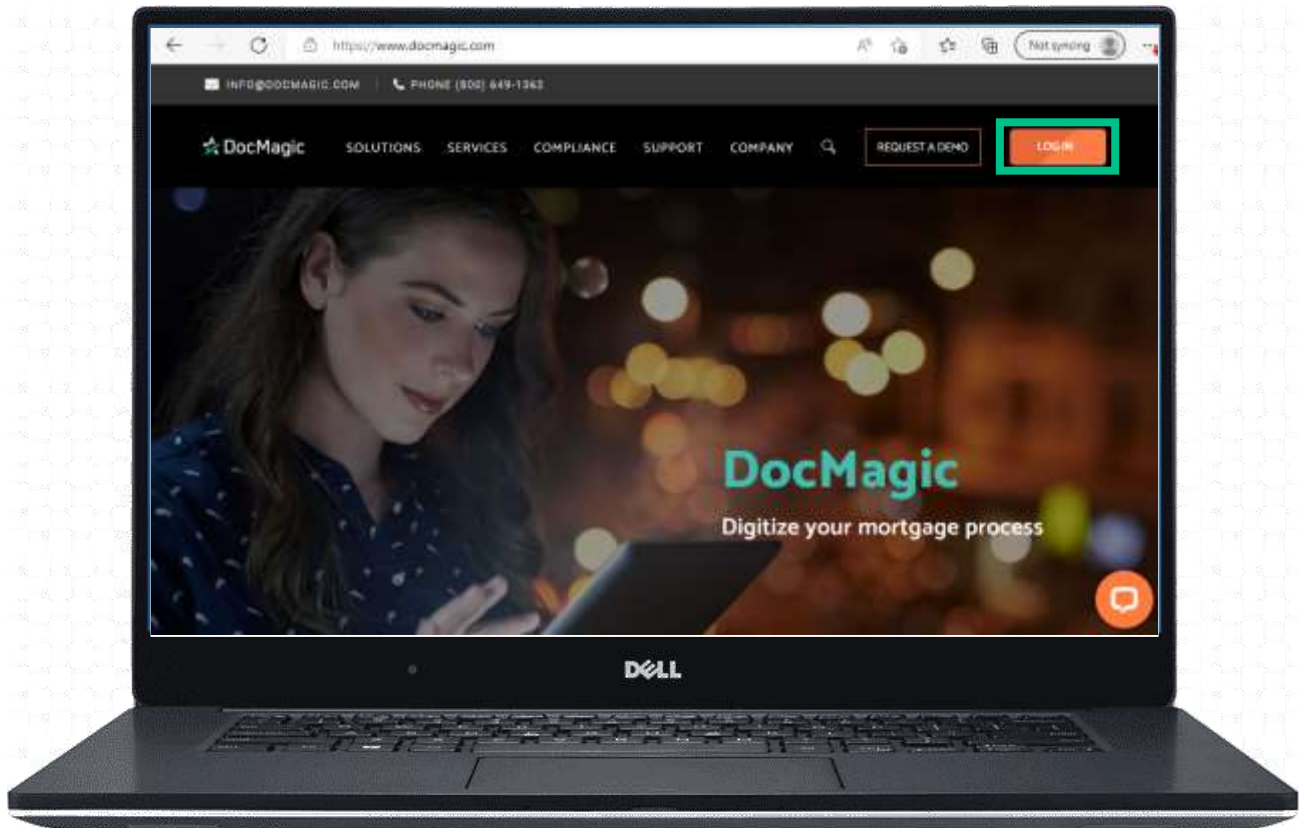
What's in the eVault?



# SmartSAFE® eVault

## Navigating to the eVault

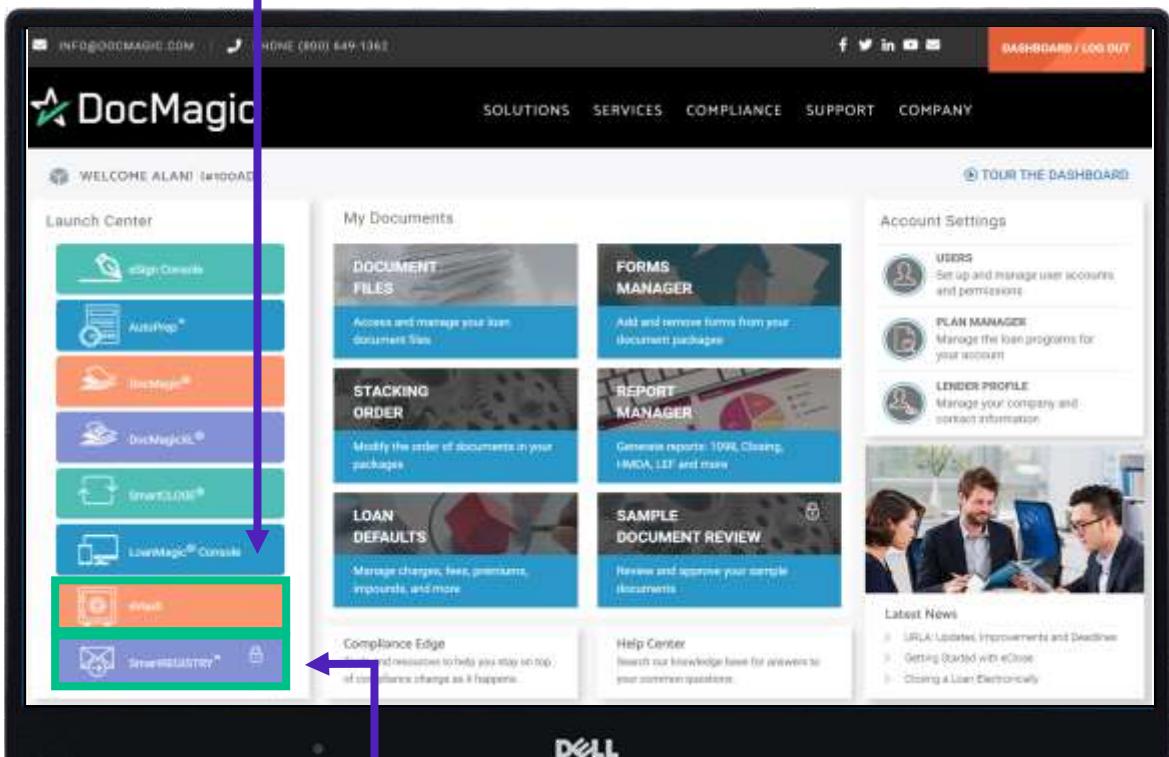
Go to [www.docmagic.com](http://www.docmagic.com)



# SmartSAFE® eVault

Launch eVault

Open eVault from the Launch Center.



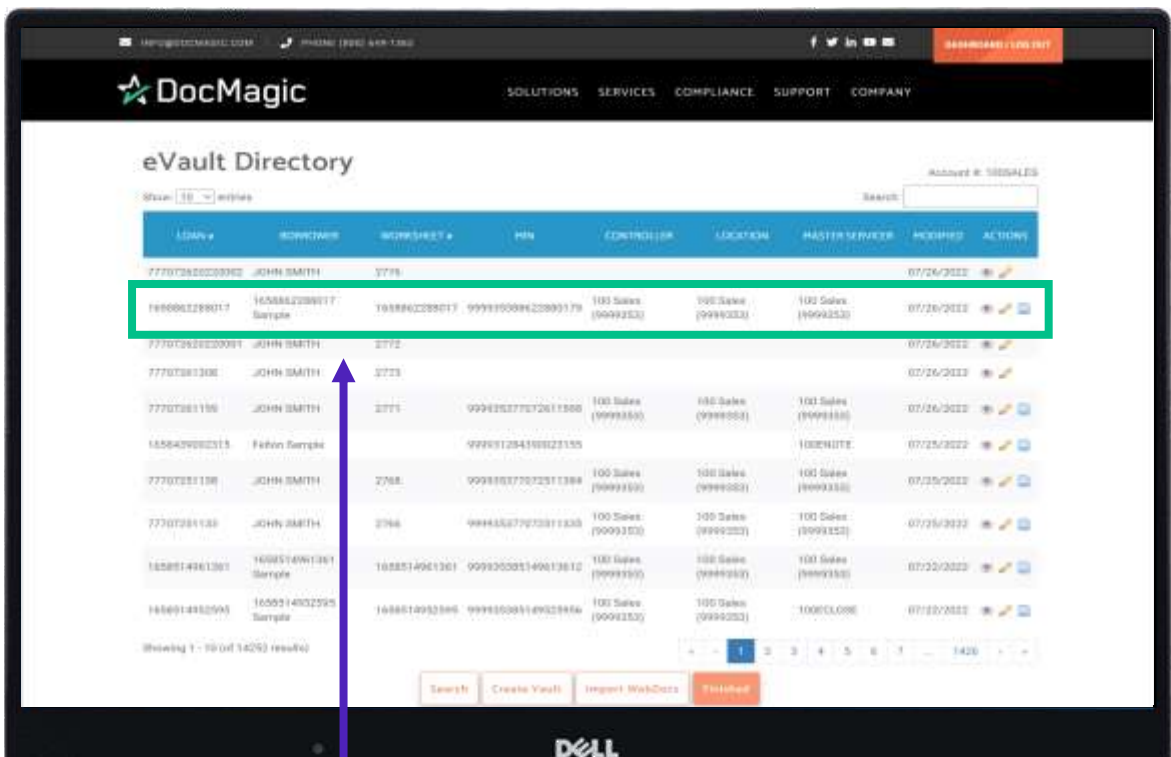
We also recommend that you check out our guide to SmartRegistry™ which can be found on our [Product Training Page](#).



# SmartSAFE® eVault

## eVault Directory

You will be brought to the eVault Directory.  
This is where all the eNotes are stored.



The screenshot displays the DocMagic eVault Directory interface. At the top, there is a navigation bar with the DocMagic logo and links for SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, and COMPANY. Below this, the page title is "eVault Directory" and the user is logged in as "Account #: 5054545". A search bar is visible on the right. The main content is a table with the following columns: LOAN#, COMPANY, WORKSHEET #, MIN, CONTROL ID#, LOCATION, MASTER SERVER, MODIFIED, and ACTION. The table contains several rows of data, with the first row highlighted in green. A blue arrow points from the text box below to the first row of the table.

LOAN#	COMPANY	WORKSHEET #	MIN	CONTROL ID#	LOCATION	MASTER SERVER	MODIFIED	ACTION
77707320228902	JOHN SMITH		3779				07/26/2012	
1666061289017	165561239017 Sample	1688862289017	99991000842089179	100 Sales (9999100)	100 Sales (9999100)	100 Sales (9999100)	07/26/2012	
77707320229001	JOHN SMITH		3772				07/26/2012	
7770732013300	JOHN SMITH		3773				07/26/2012	
777073201190	JOHN SMITH		3771	099430277072611300	100 Sales (9999100)	100 Sales (9999100)	07/26/2012	
1656459020315	Felix Sample			99991284100023155		100WHITE	07/25/2012	
77707321138	JOHN SMITH		2768	09991007707231138	100 Sales (9999100)	100 Sales (9999100)	07/25/2012	
77707281130	JOHN SMITH		2766	99991007707231130	100 Sales (9999100)	100 Sales (9999100)	07/25/2012	
1658514901301	1658514901301 Sample	1658514901301	099910001149013010	100 Sales (9999100)	100 Sales (9999100)	100 Sales (9999100)	07/22/2012	
1656914902590	1656914902590 Sample	1656914902590	99991000114902590	100 Sales (9999100)	100 Sales (9999100)	1000CLOSE	07/22/2012	

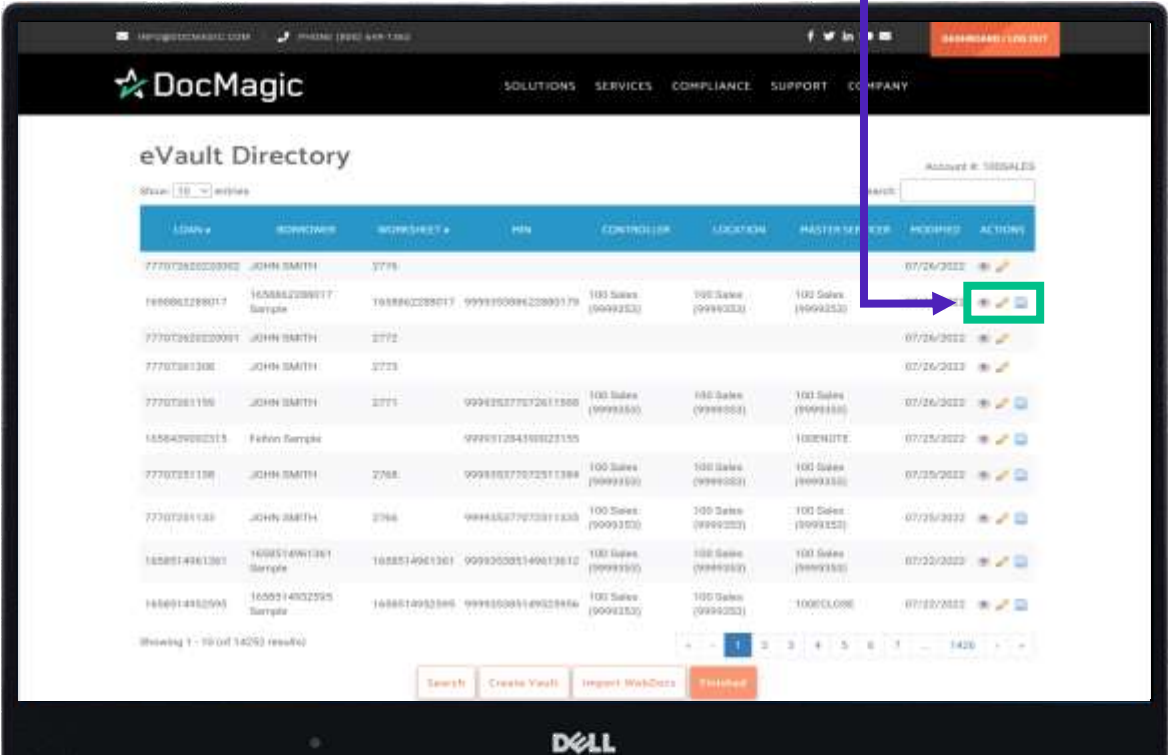
Key information can be seen for each loan, including identifiers such as the Loan Number and the MIN.



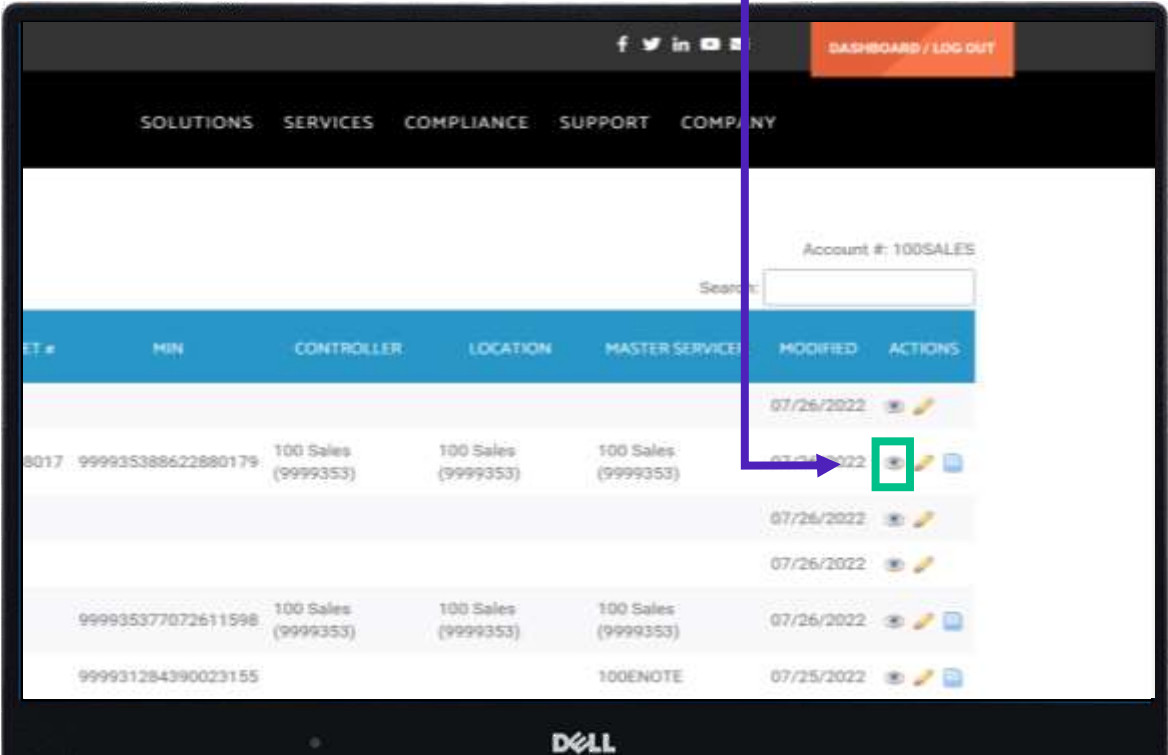
# SmartSAFE® eVault

## Action Icons

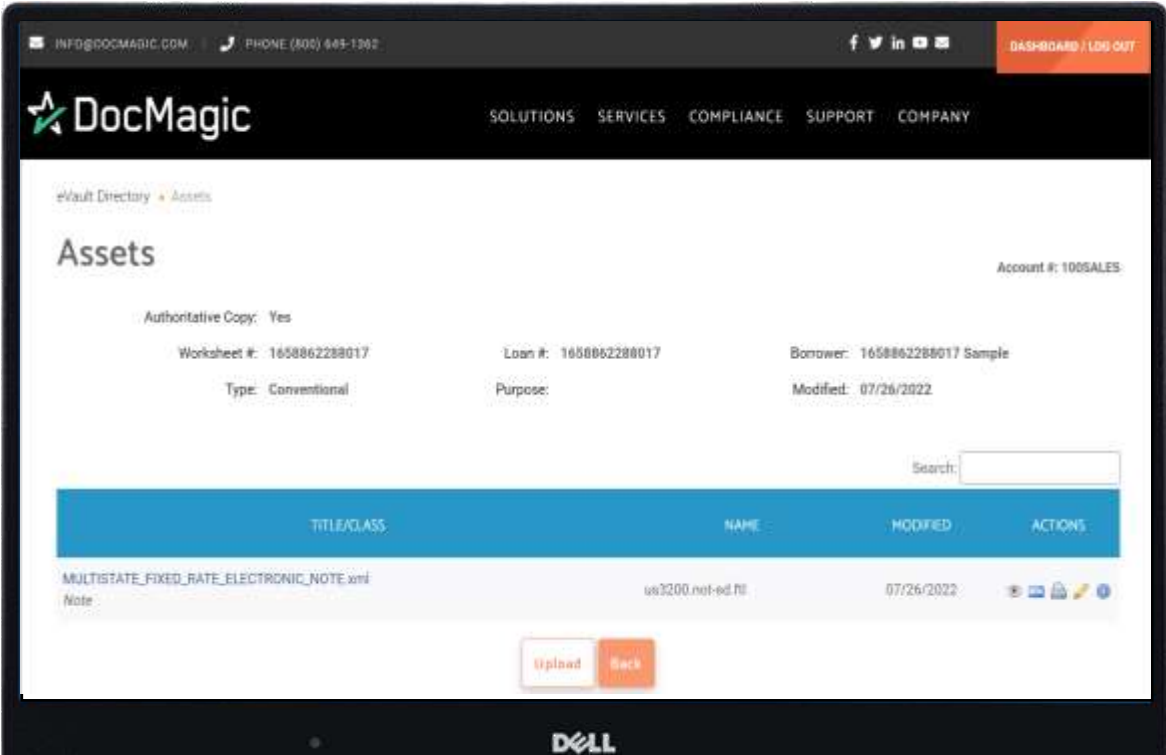
On the far right of each row, you'll see up to 3 icons under Actions.



Click on the eyeball icon to go to the Assets page for that note.

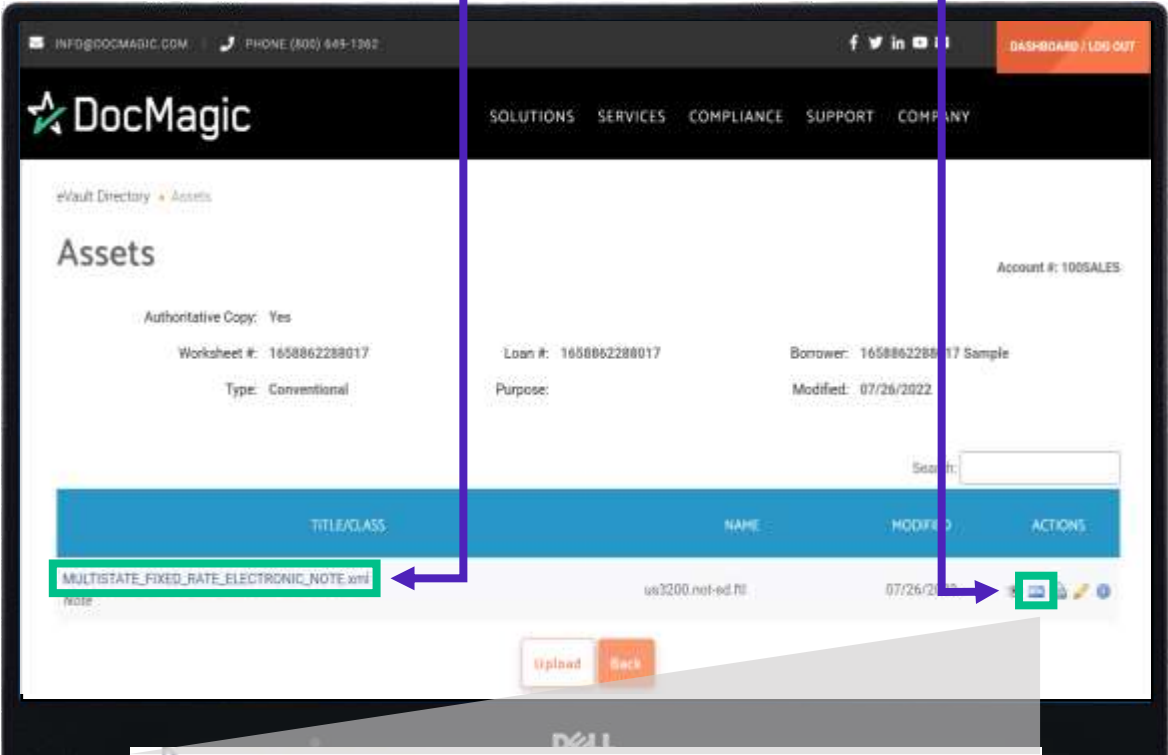


The assets are the documents that were electronically signed during the transaction, including the eNote.





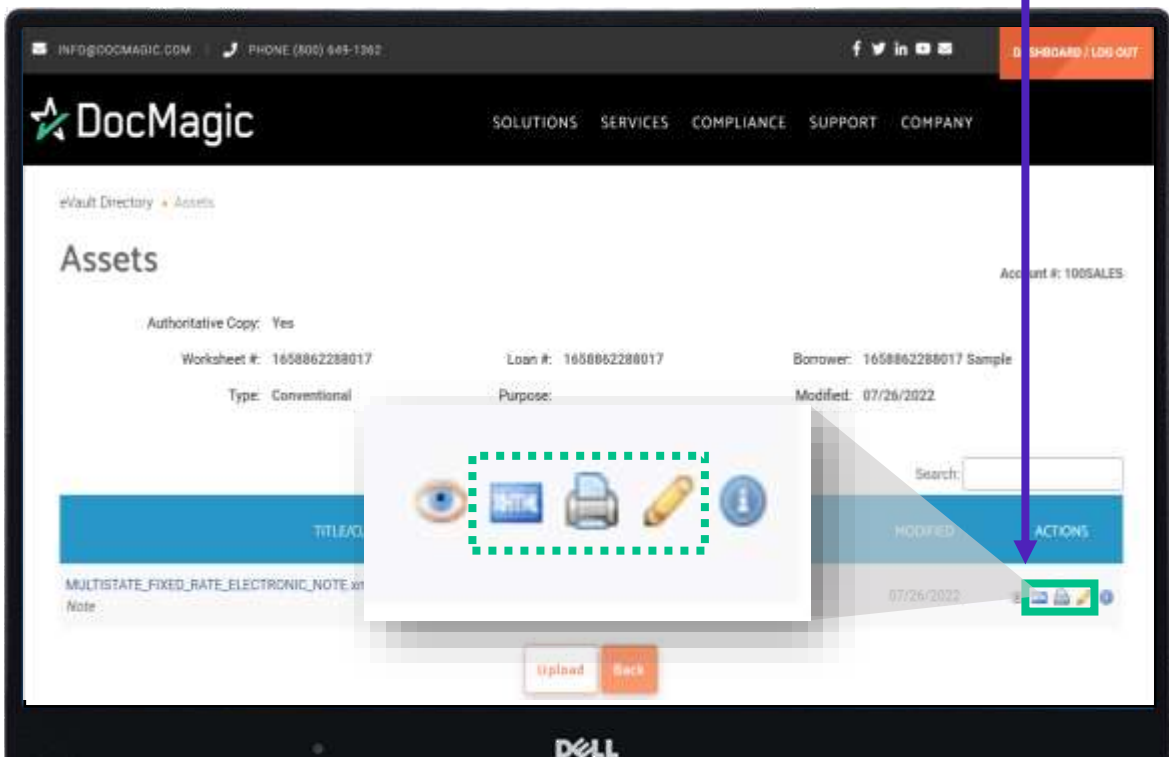
On the Assets page, you can find a copy of the eNote in XML format. You can click on either the file name or the little blue icon to view the XML.



```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE EMORTGAGE_PACKAGE SYSTEM "EMORTGAGE_PACKAGE_v2_4.dtd">
<EMORTGAGE_PACKAGE MISMOVersionIdentifier="2.4" _ID="EMP_01">
  <EMBEDDED_FILE _ID="SD_01" MISMOVersionID="2.4" _EncodingType="Base64" MIMEType="text/xml">
    <DOCUMENT>PD94bWwgdmVyc2lvbj0MS4wIiBibmNvZGluZz0iVVRGLTgiPz4NCjwhRE9DVFIQRSBT
  </EMBEDDED_FILE>
  <EMBEDDED_FILE _ID="IMG_1" MISMOVersionID="2.4" _EncodingType="Base64" MIMEType="image/png">
    <DOCUMENT>IVBORw9KGgoAAAAANSuHEUgAAAAUAAAAoCAYAAAAPtL9EAAAAACXBWIXHAAA7EAA
  </EMBEDDED_FILE>
</EMORTGAGE_PACKAGE>
```



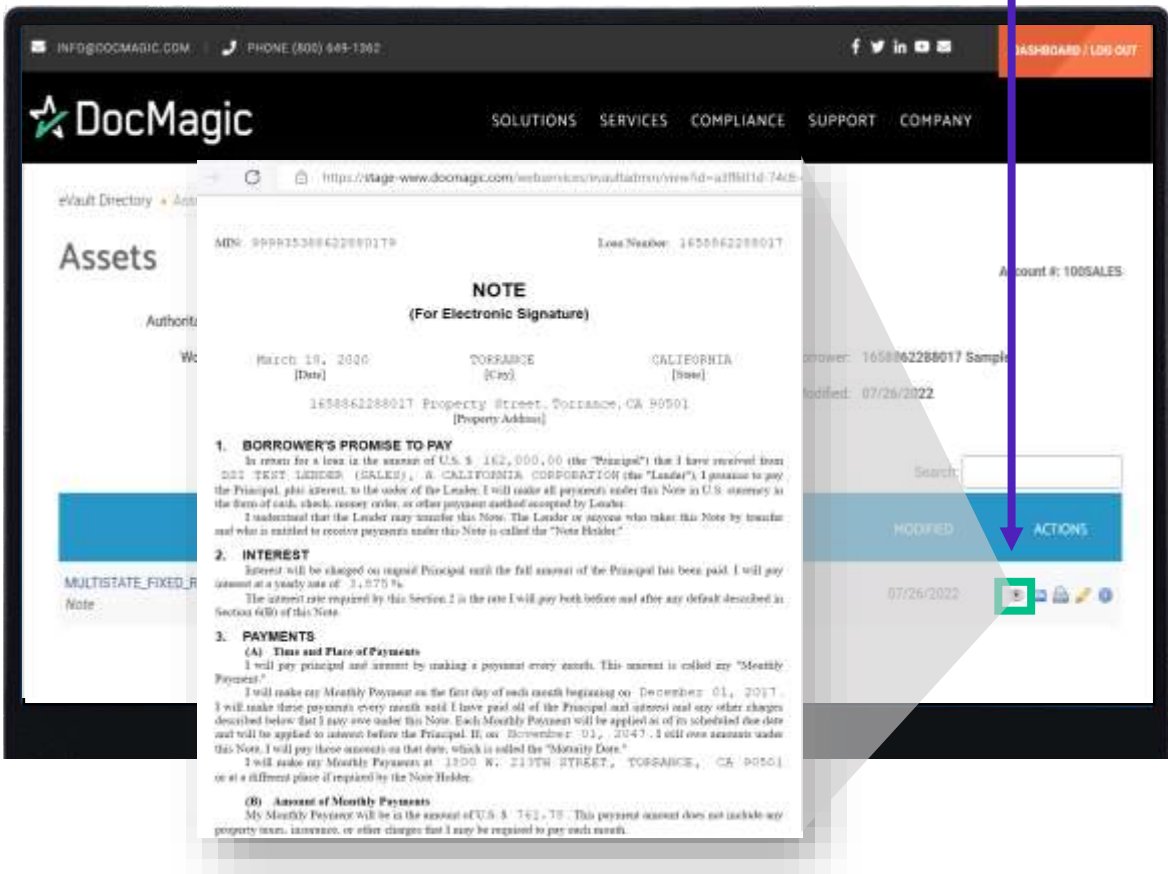
You can also download, print, and edit the document.



The asset will always be downloaded as a *copy*.



Clicking the eyeball under Actions will open the file in a new browser tab.



This eNote is MISMO-compliant XML data specifically designed for eSignature.



# SmartSAFE® eVault

## Information Icon

The Information icon brings up additional details about the eNote.

The screenshot shows the DocMagic eVault interface. A modal window titled "Asset Details" is open, displaying the following information:

**DETAILS** | ENOTE

Version: 1.02 | Category: 1 | Type: Note  
State: Signed | Validation: Pass | Authoritative Copy: Yes  
Presentation: | | Data | Transaction Summary

**Audit Trail**

ACTION TYPE	PERFORMED BY	DATE
Unpopulated	Document Systems (DocMagic)	09/02/2022
Populated	Document Systems (DocMagic)	09/02/2022
Signable	Document Systems (DocMagic)	09/02/2022
Signed	Borrower	09/02/2022
Signed	Borrower	09/02/2022
Signed	Document Systems (DocMagic)	09/02/2022

A green box highlights the information icon (a blue circle with a white 'i') in the bottom right corner of the modal window.

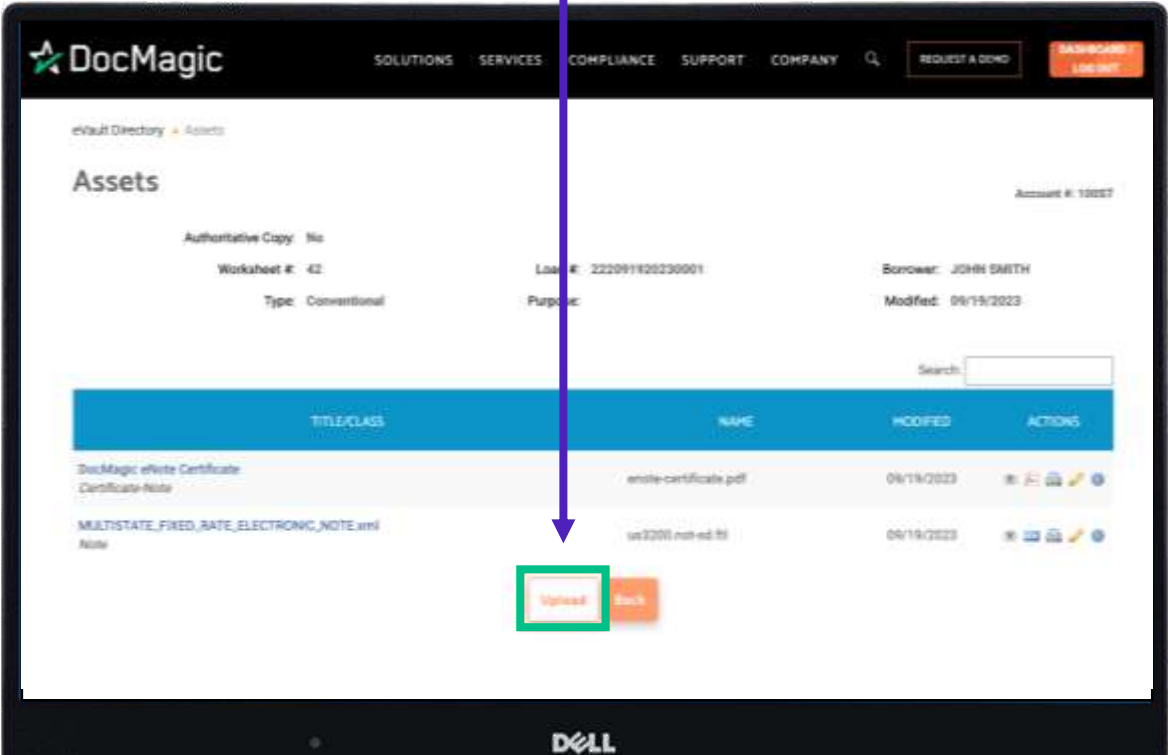
Among other things, the data here shows you the validation status of the eNote.



# SmartSAFE® eVault

## Adding Documents

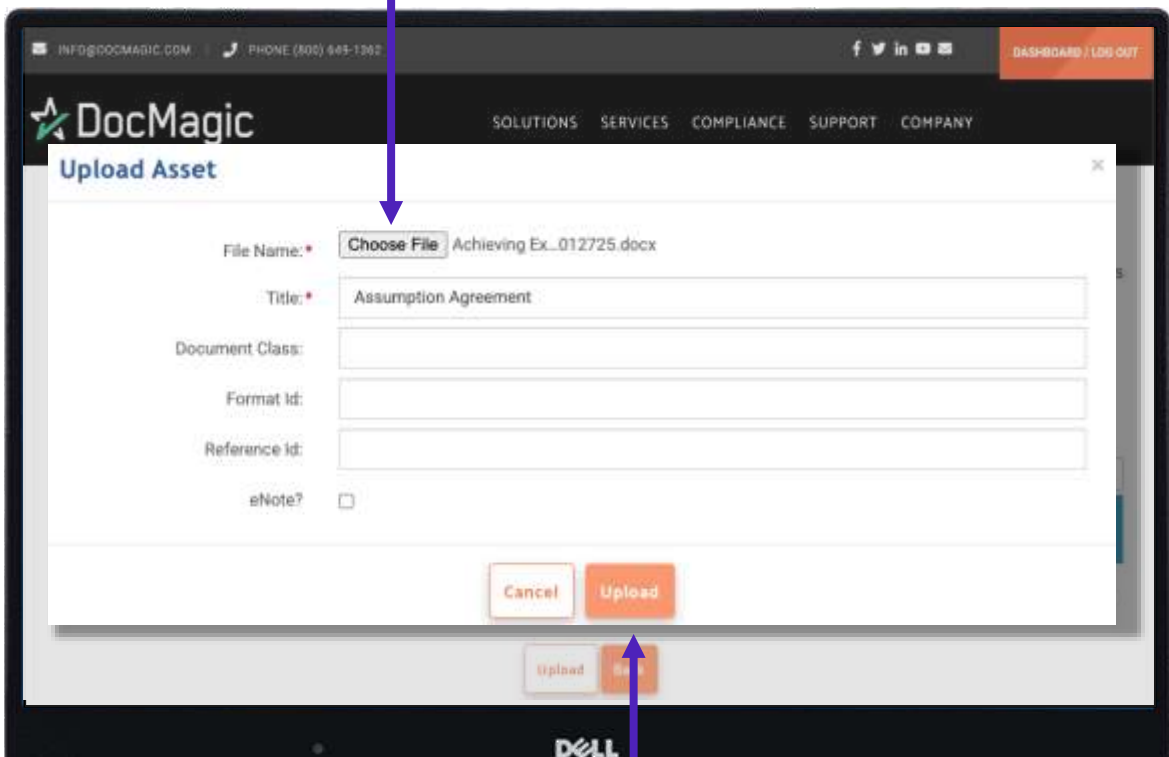
If you need to add any documentation to the package post-closing, you can upload it here.



# SmartSAFE® eVault

## Adding Documents

From this Upload Asset window that appears, choose a file on your computer, give it a title, fill out any additional optional fields.



The screenshot shows a web browser window displaying the DocMagic 'Upload Asset' interface. The browser's address bar shows 'INFO@DOCMAGIC.COM' and 'PHONE: (800) 449-1362'. The DocMagic logo is in the top left, and navigation links for 'SOLUTIONS', 'SERVICES', 'COMPLIANCE', 'SUPPORT', and 'COMPANY' are in the top right. The 'Upload Asset' window has a title bar with a close button. The form contains the following fields: 'File Name' with a 'Choose File' button and the text 'Achieving Ex...012725.docx'; 'Title' with the text 'Assumption Agreement'; 'Document Class' (empty); 'Format Id' (empty); 'Reference Id' (empty); and an 'eNote?' checkbox which is unchecked. At the bottom of the form are 'Cancel' and 'Upload' buttons. Below the form, there are two more 'Upload' buttons, one of which is highlighted with a blue arrow pointing upwards.

Click Upload to confirm.



# SmartSAFE® eVault

## Adding Documents

Your added document will appear here.

The screenshot displays the DocMagic eVault interface. At the top, there is a navigation bar with the DocMagic logo and menu items: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, and COMPANY. A search icon and a 'REQUEST A DEMO' button are also present. Below the navigation bar, the page title is 'eVault Directory > Assets'. The main content area is titled 'Assets' and includes a search bar. Below the search bar, there is a table with columns: TITLE/CLASS, NAME, MODIFIED, and ACTIONS. The table contains three rows of data. At the bottom of the table, there are 'Upload' and 'Back' buttons. The Dell logo is visible at the bottom of the screen.

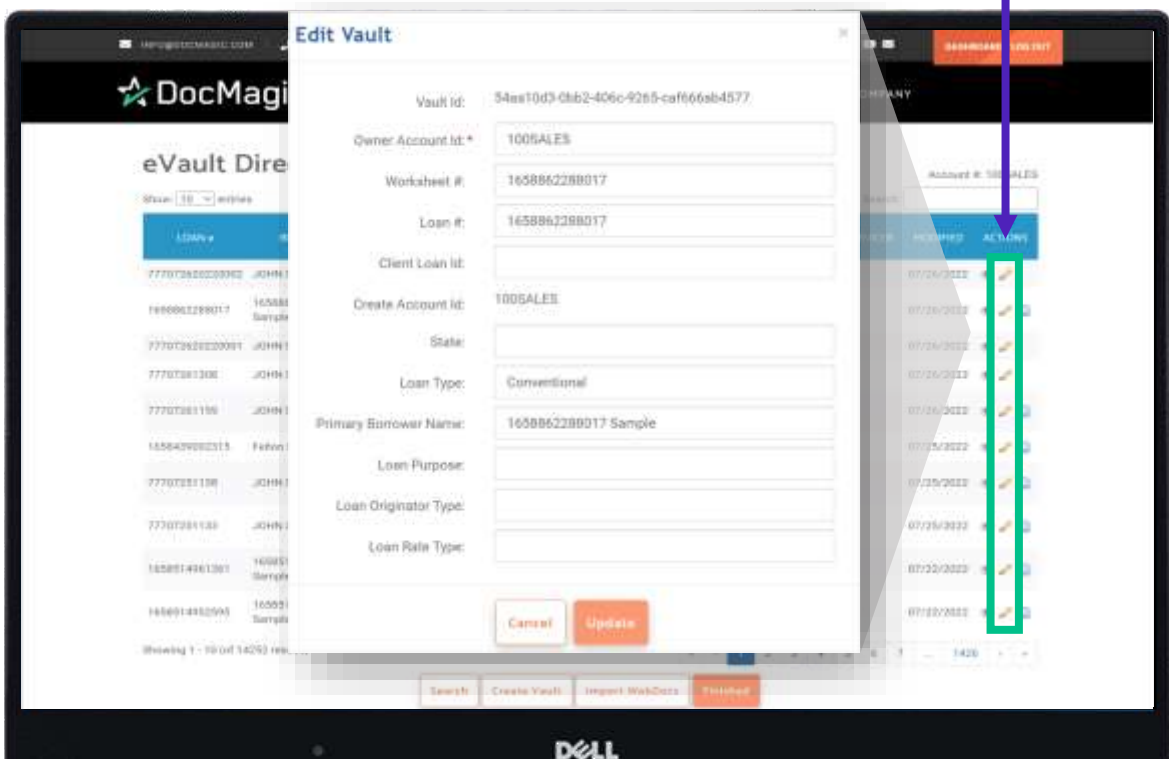
TITLE/CLASS	NAME	MODIFIED	ACTIONS
Assumption Agreement unknown		02/05/2025	
DocMagic eNote Certificate Certificate-Note	enote certificate.pdf	09/19/2023	
MULTISTATE_FIXED_RATE_ELECTRONIC_NOTE.xml Note	us2000 not ed.NE	09/19/2023	



# SmartSAFE® eVault

## Editing the eNote

Back on the main page, you can click on the pencil icon to edit the data associated with the eNote. In the window that appears, most of the parameters can be edited.

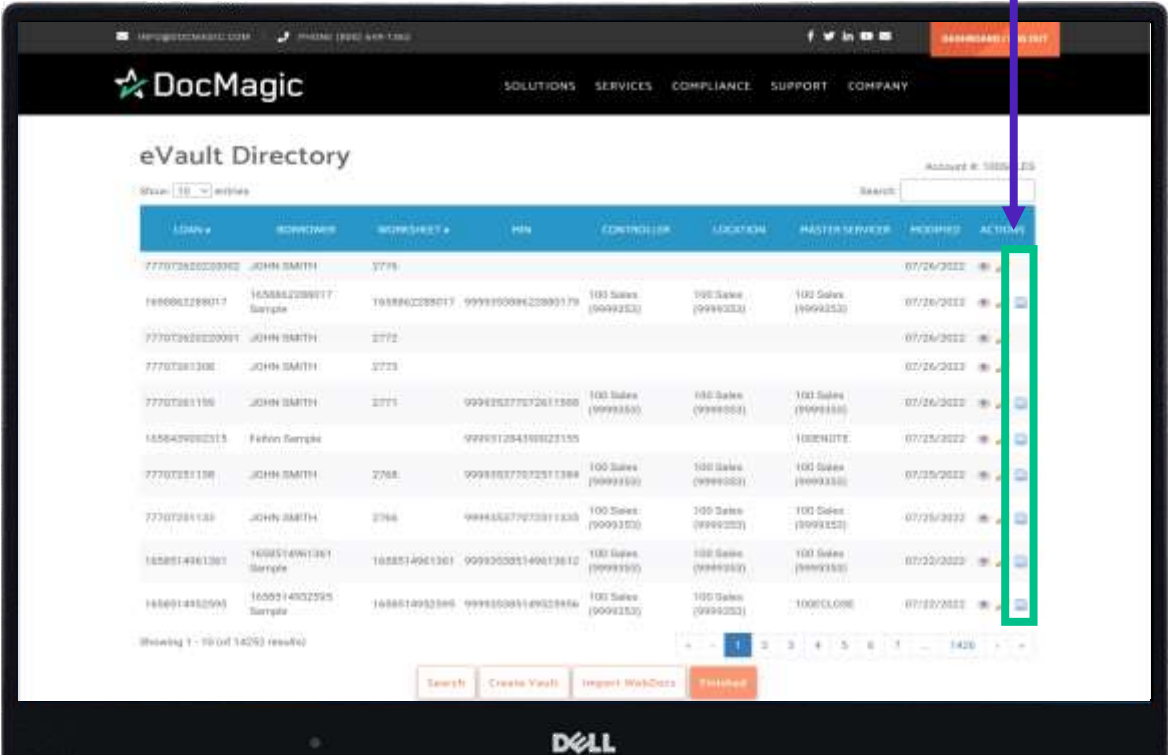


The information listed here is eNote metadata that is stored and used locally within DocMagic environments. It does not transfer to other eVaults.

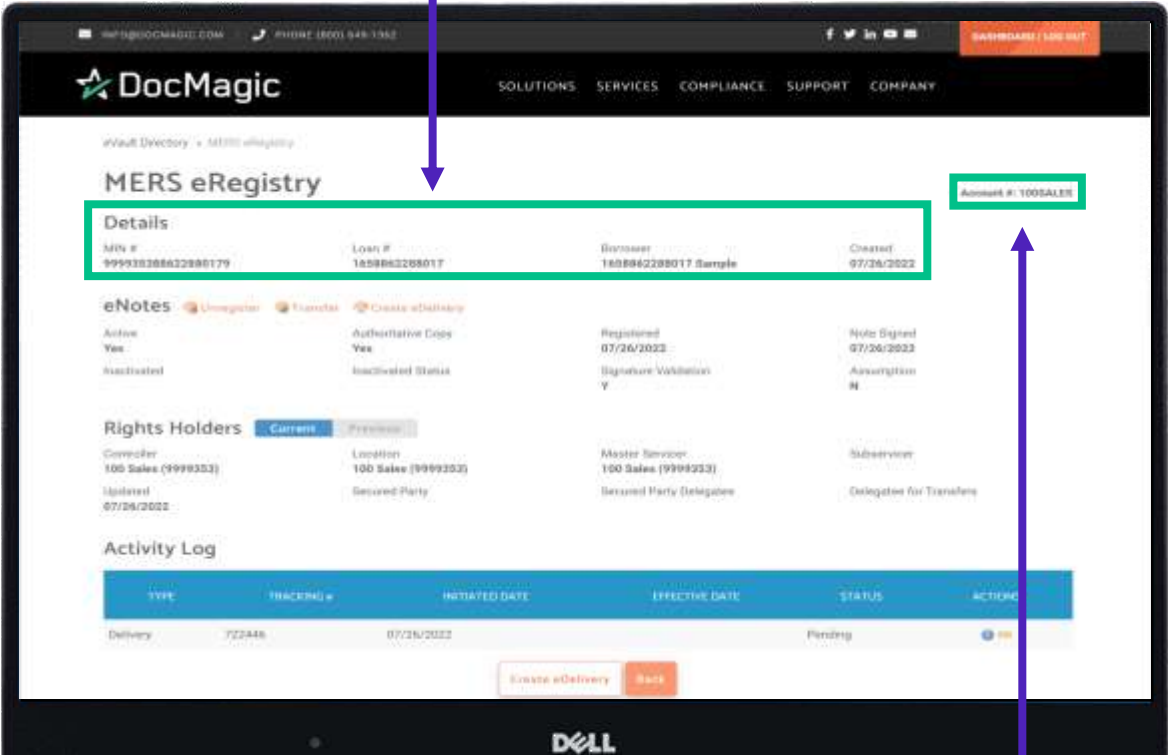




Finally, the rightmost icon takes you to go the eNotes MERS Registry Page.



Key information on the eNote can be found under Details.



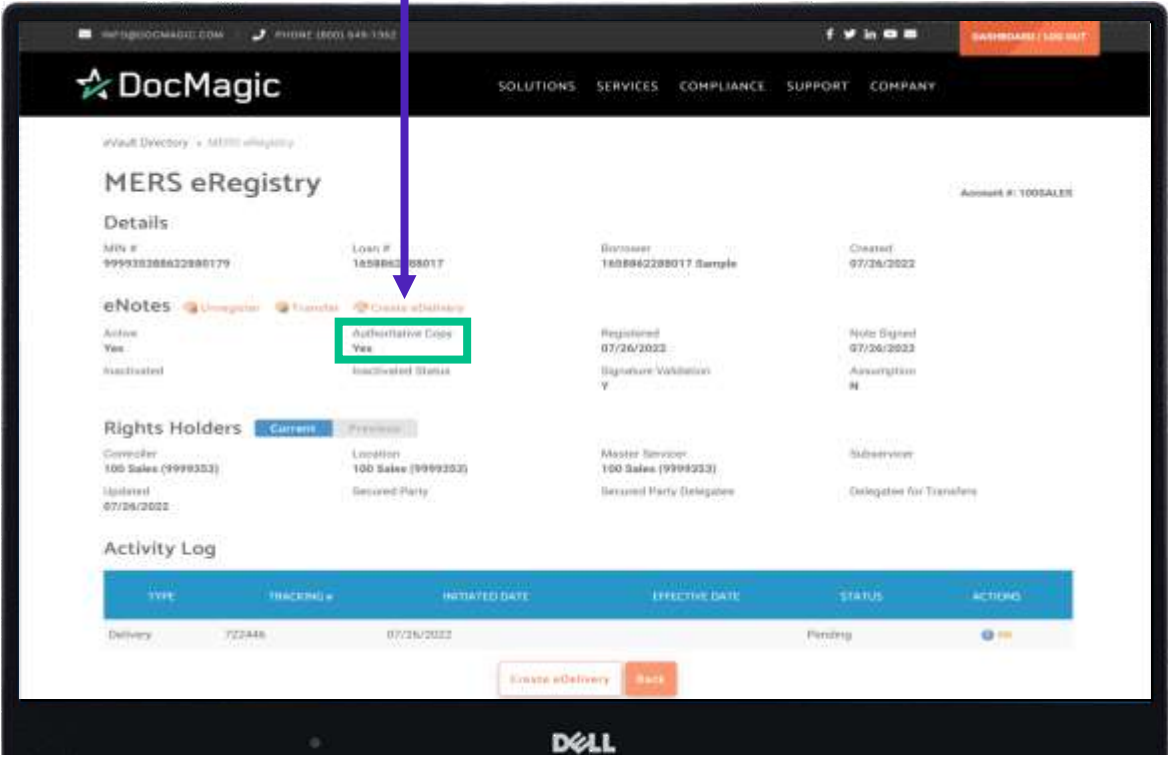
The Account Number can be found here.



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## Authoritative Copy

The Location Holder is the Authoritative Copy owner. A "Yes" indicates the Location Rights are currently with the Org ID of this account. It has not been transferred yet.



# SmartSAFE® eVault

## eNote Capabilities

Here, (1) you can register or unregister the note, (2) transfer the eNote or (3) create an eDelivery.

The screenshot displays the DocMagic MERS eRegistry interface. A blue arrow points from the text box above to the 'eNotes' section. The 'eNotes' section includes buttons for 'Unregister', 'Transfer', and 'Create eDelivery'. Below this, there are sections for 'Rights Holders' and 'Activity Log'. The 'Activity Log' table shows a record for a 'Delivery' with tracking ID '722448', initiated on '07/26/2022', with an effective date of '07/26/2022', and a status of 'Pending'. At the bottom right, there are buttons for 'Create eDelivery' and 'Back'.

TYPE	TRACKING #	INITIATED DATE	EFFECTIVE DATE	STATUS	ACTIONS
Delivery	722448	07/26/2022	07/26/2022	Pending	

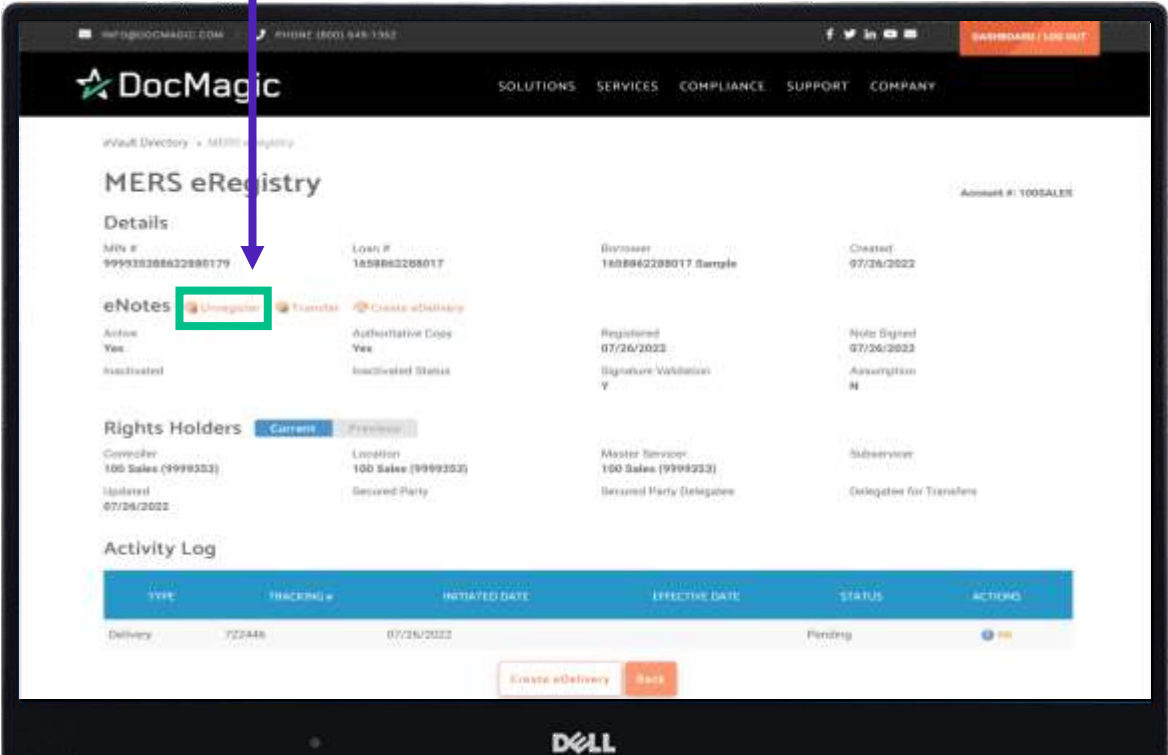
These functions will be explained in the slides below.



# SmartSAFE® eVault

## Automatic Registration

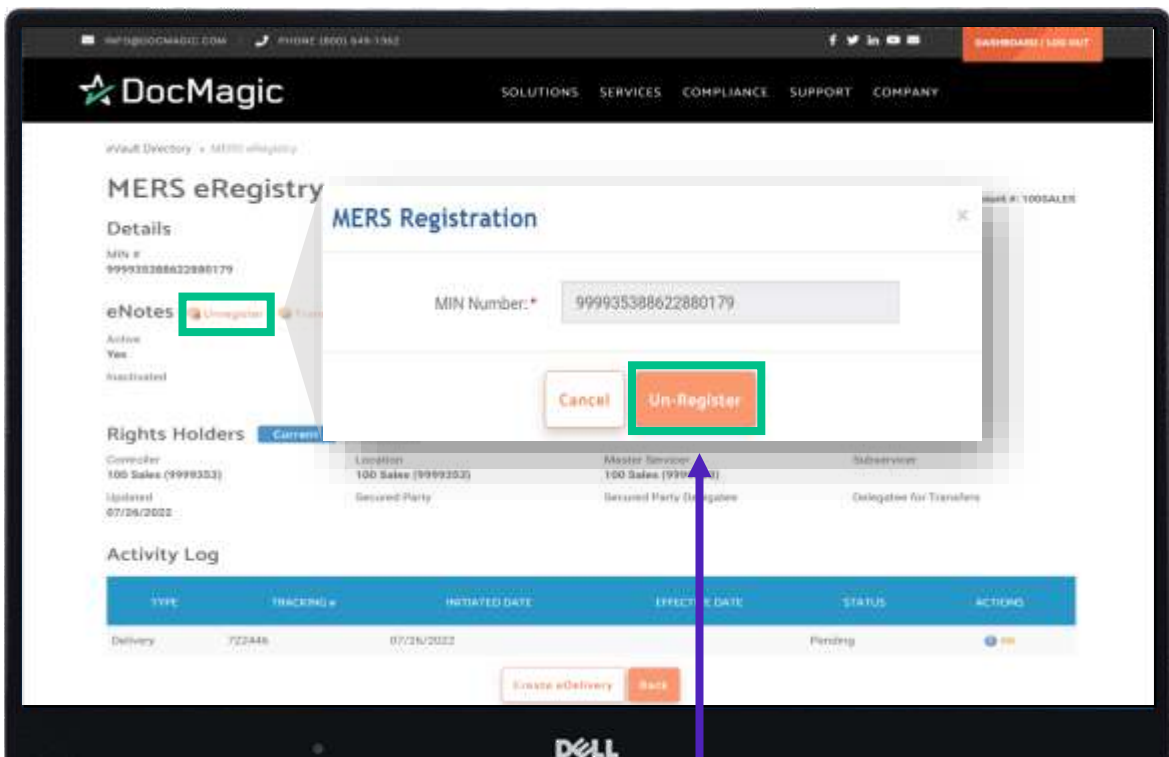
Our clients are automatically registered with MERS. The eNote will be registered by default and you will start with the option to Unregister it.



# SmartSAFE® eVault

## Unregister the eNote

Clicking to Unregister will open this window, automatically populating this MIN.



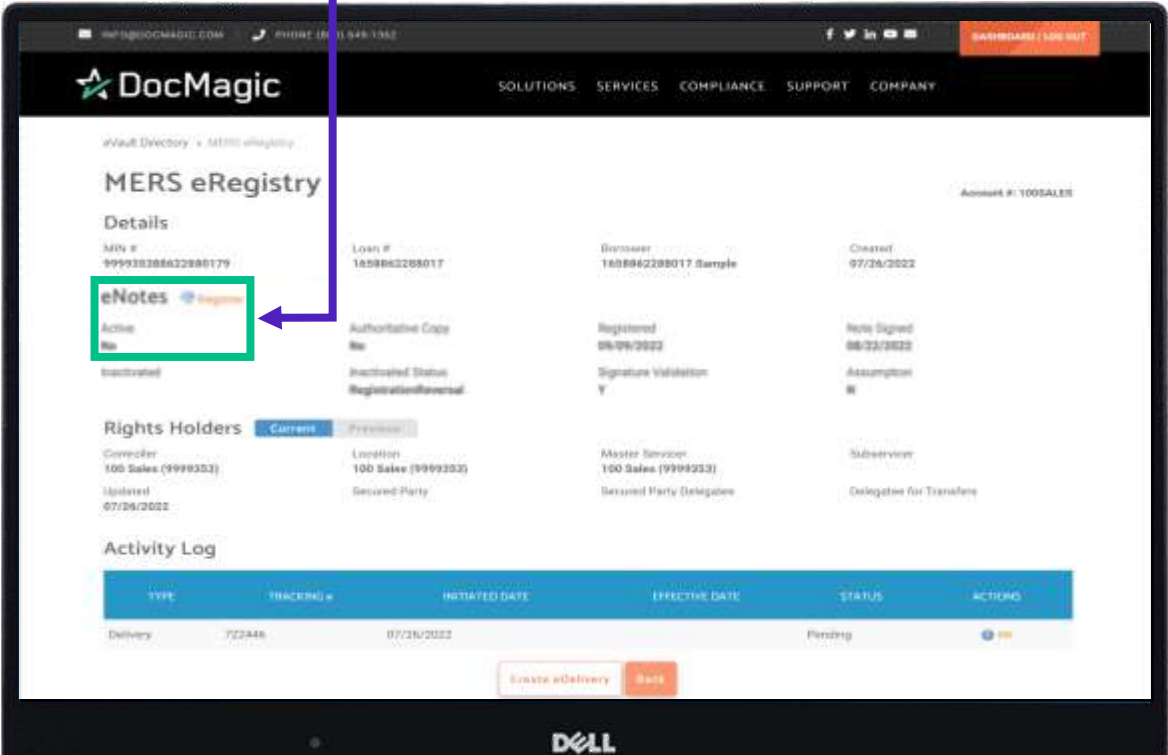
Hit Un-Register to confirm.



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Register the eNote

This is what the unregistered eNote page looks like. You now have the option to register the eNote.



# SmartSAFE® eVault

Register the eNote

Updating the status can be done in [SmartRegistry](#).

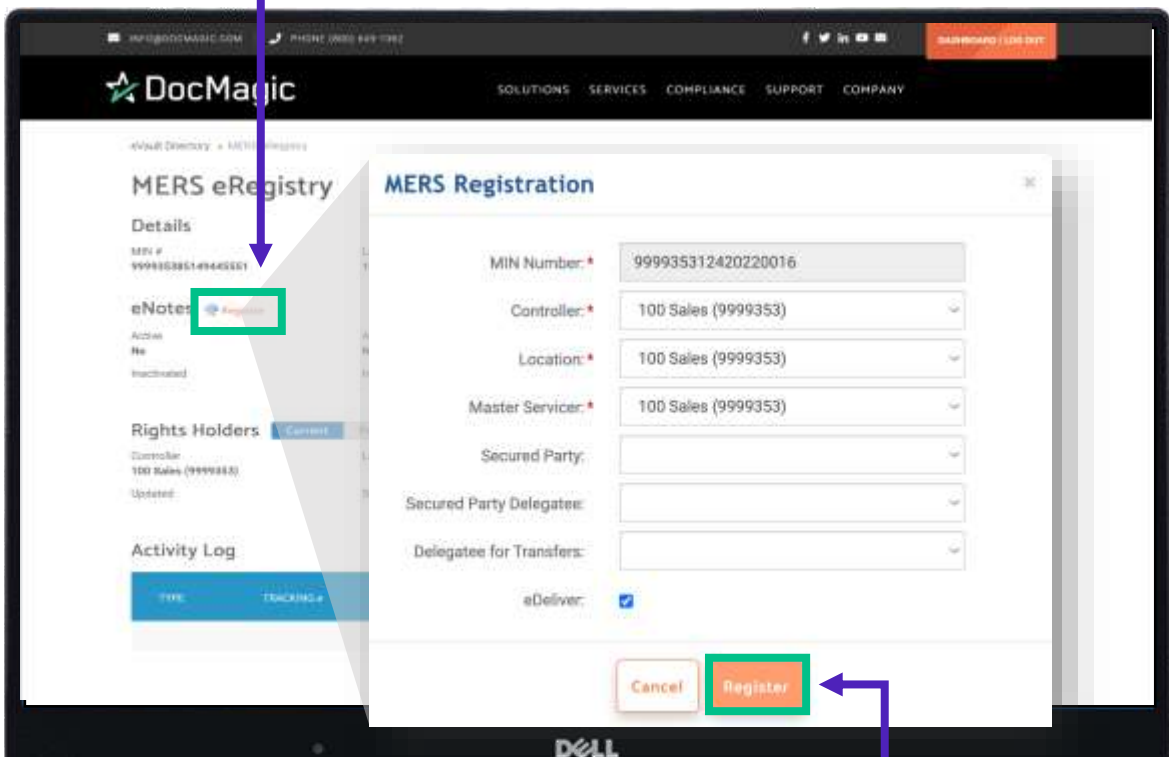
The screenshot displays the DocMagic MERS eRegistry interface. A blue arrow points from the text above to a dropdown menu in the 'eNotes' section. The dropdown menu is open, showing 'Inactivated Status' and 'Registration/Reversal' as options. The 'Inactivated Status' option is highlighted with a green box. The interface includes a navigation bar with 'SOLUTIONS', 'SERVICES', 'COMPLIANCE', 'SUPPORT', and 'COMPANY'. The main content area shows details for a specific eNote, including its ID, loan number, borrower information, and registration status. Below the details, there are sections for 'Rights Holders' and an 'Activity Log' table.

TYPE	TRACKING #	INITIATED DATE	EFFECTIVE DATE	STATUS	ACTIONS
Delivery	722448	07/26/2022		Pending	





To Register the note, click Register. This window will appear.



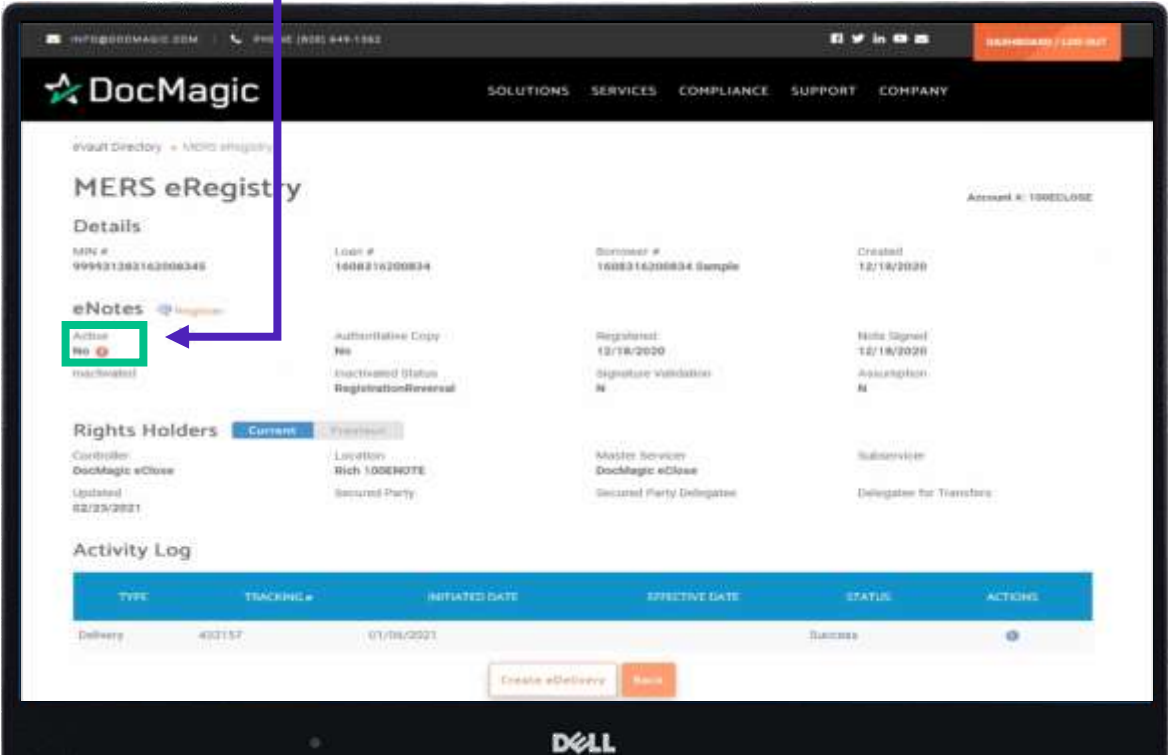
It will default to the Client Settings for registrations.



# SmartSAFE® eVault

Red Exclamation = Inactive eNote

If you see a red exclamation logo, it means that your eNote is inactive.



# SmartSAFE® eVault

## MERS Transfer Window

If you want to transfer this note to an outside client, click Transfer. The MERS Transfer window will appear.

The screenshot displays the DocMagic MERS eRegistry interface. On the left, the 'MERS eRegistry' details are visible, including a 'Transfer' button highlighted with a green box. A purple arrow points from this button to the 'MERS Transfer' modal window on the right. The modal window contains the following fields:

- Action: A dropdown menu.
- Effective Date: A date field set to 07/26/2022.
- eDeliver: A checked checkbox.

At the bottom of the modal are 'Cancel' and 'Transfer' buttons. Below the modal, the 'Rights Holders' section shows 'Current' and 'Previous' tabs, and an 'Activity Log' table with columns: TYPE, TRACKING #, INITIATED DATE, EFFECTIVE DATE, STATUS, and ACTION. The table contains one entry: Delivery, 722448, 07/26/2022, Pending.

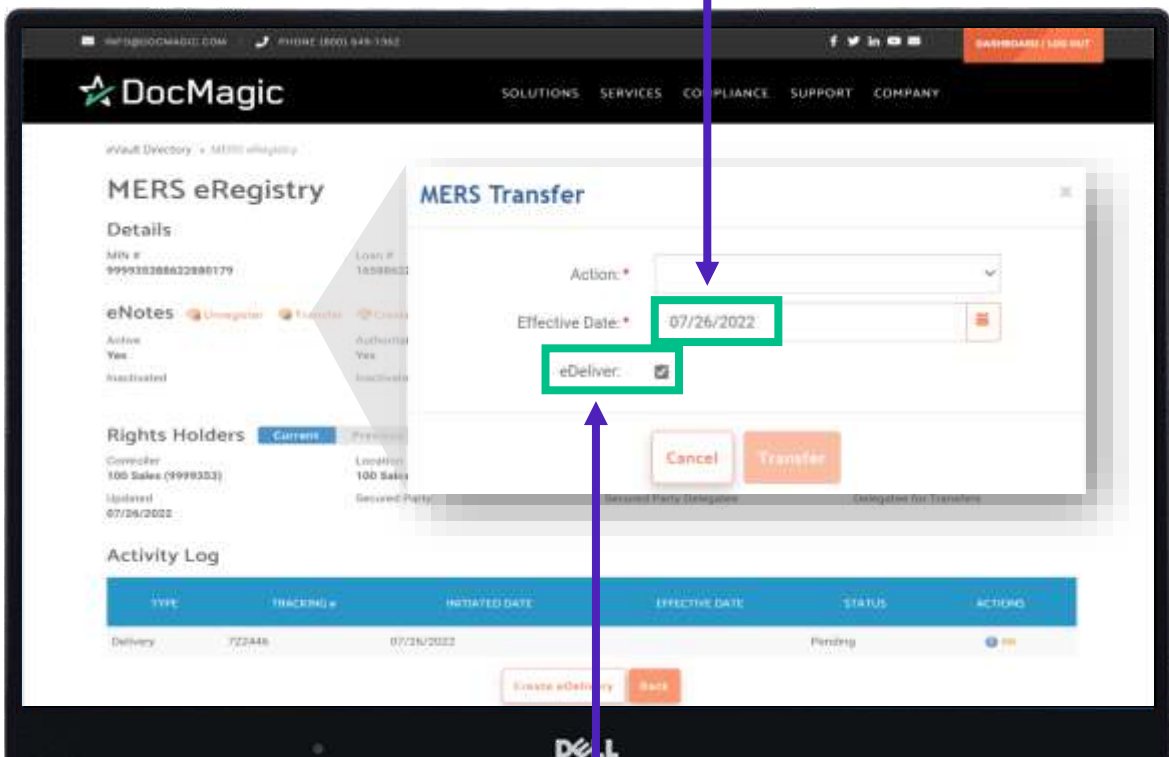
Please note that a note must be registered before it can be transferred.



# SmartSAFE® eVault

## MERS Transfer Window

The Effective Date will be defaulted.



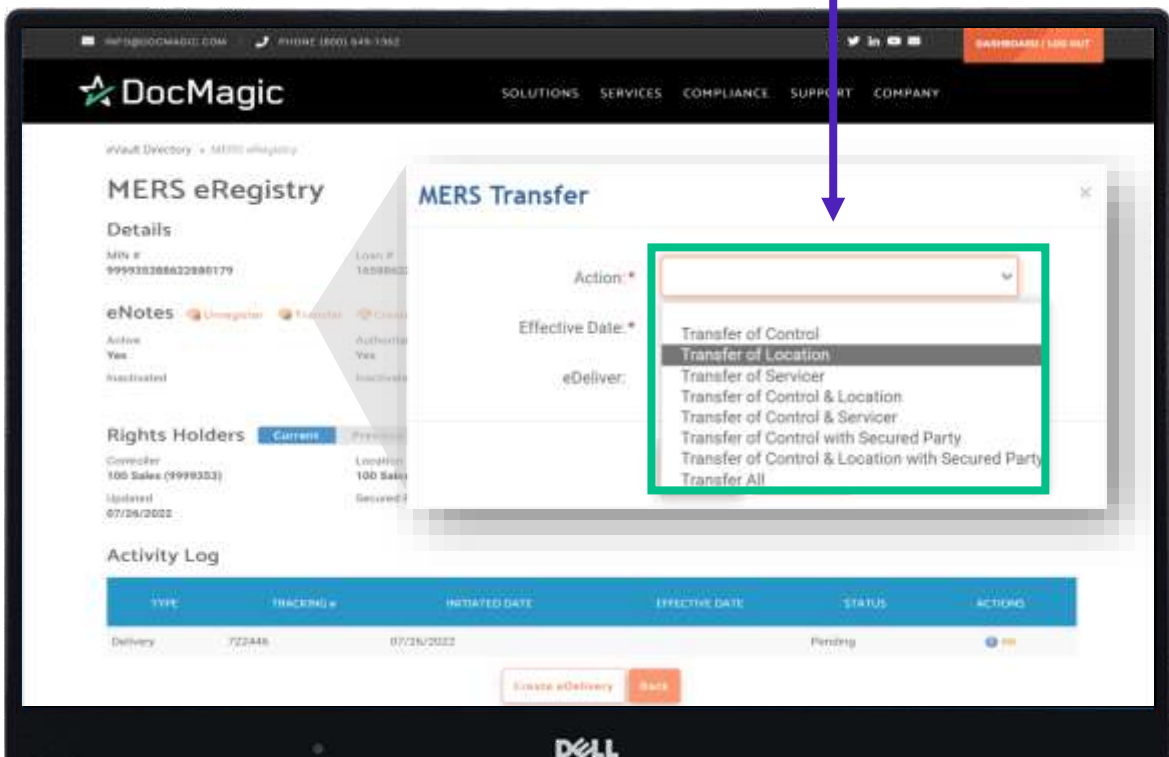
You have the option to do eDelivery.



# SmartSAFE® eVault

## MERS Transfer Window

Select the rights you want to transfer from the dropdown next to Actions. For demonstrative purposes, we will select "Transfer of Location".



The screenshot displays the DocMagic MERS eRegistry interface. A modal window titled "MERS Transfer" is open, showing a dropdown menu for the "Action" field. The dropdown menu is highlighted with a green border and contains the following options: "Transfer of Control", "Transfer of Location", "Transfer of Servicer", "Transfer of Control & Location", "Transfer of Control & Servicer", "Transfer of Control with Secured Party", "Transfer of Control & Location with Secured Party", and "Transfer All". The "Transfer of Location" option is currently selected. The background interface shows details for a MERS eRegistry entry, including a loan number, eNotes, rights holders, and an activity log table.

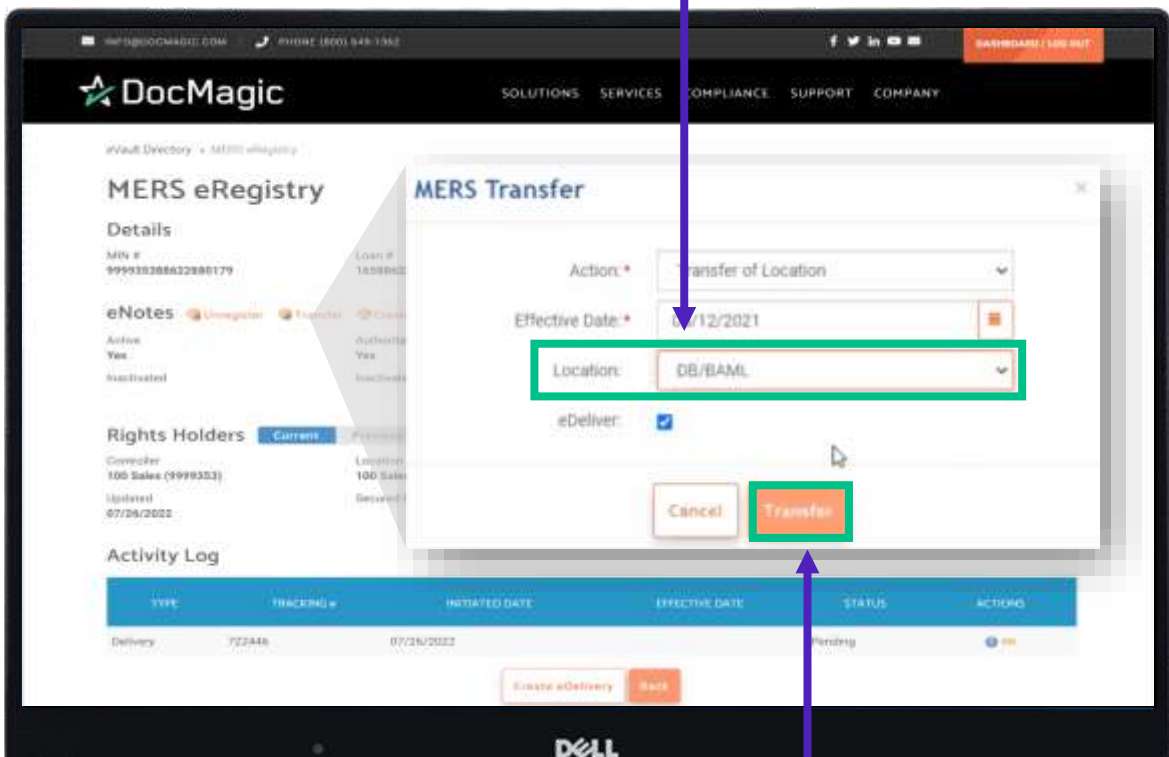
TYPE	TRACKING #	INITIATED DATE	EFFECTIVE DATE	STATUS	ACTION
Delivery	722448	07/26/2022		Pending	



# SmartSAFE® eVault

## Location

Once chosen, another field for Location appears. Select the Location you are transferring to with the dropdown.



Select Transfer when finished.



When the Transfer of Location to an external party is complete, the Authoritative Copy is listed as "No" from the requesting party.

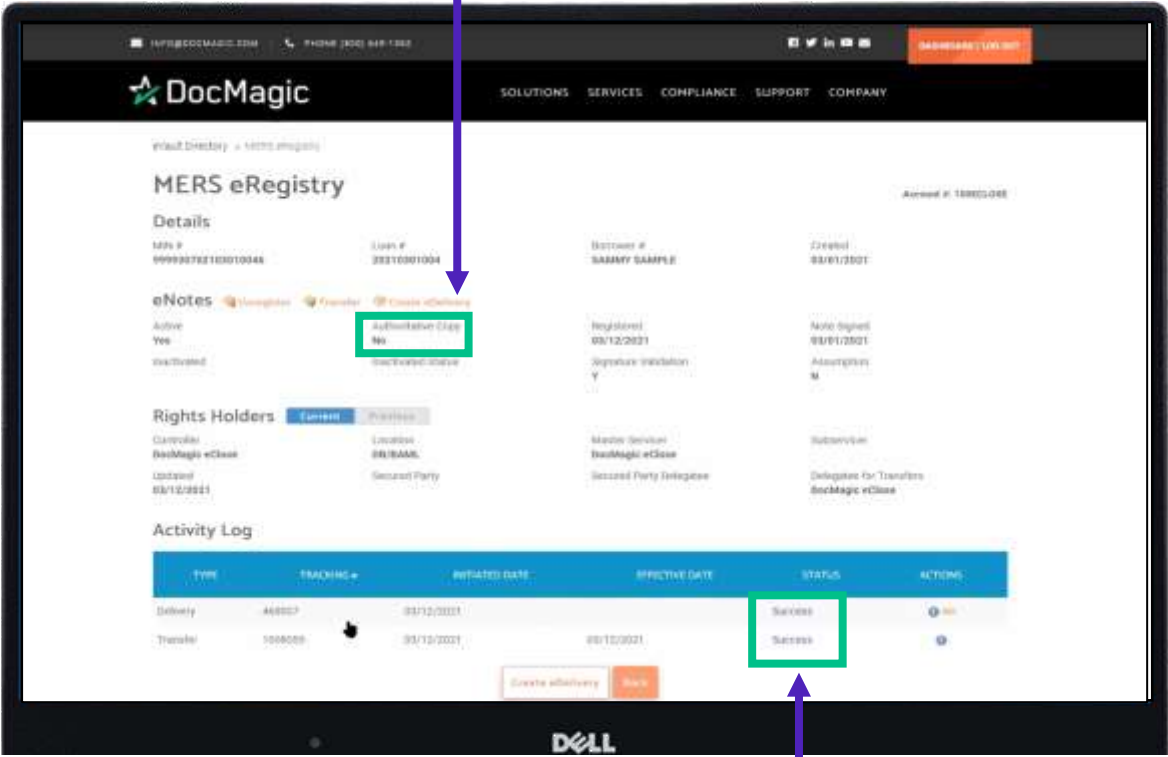
The screenshot displays the DocMagic MERS eRegistry interface. The 'eNotes' section shows 'Authoritative Copy' as 'No'. The 'Activity Log' table below it contains the following data:

TYPE	TRACKING	INITIATED DATE	EFFECTIVE DATE	STATUS	ACTIONS
Delivery	468027	03/12/2021		Success	
Transfer	1000005	03/12/2021	03/12/2021	Success	

An entry will be recorded in the Activity Log.



The new location will be shown here.

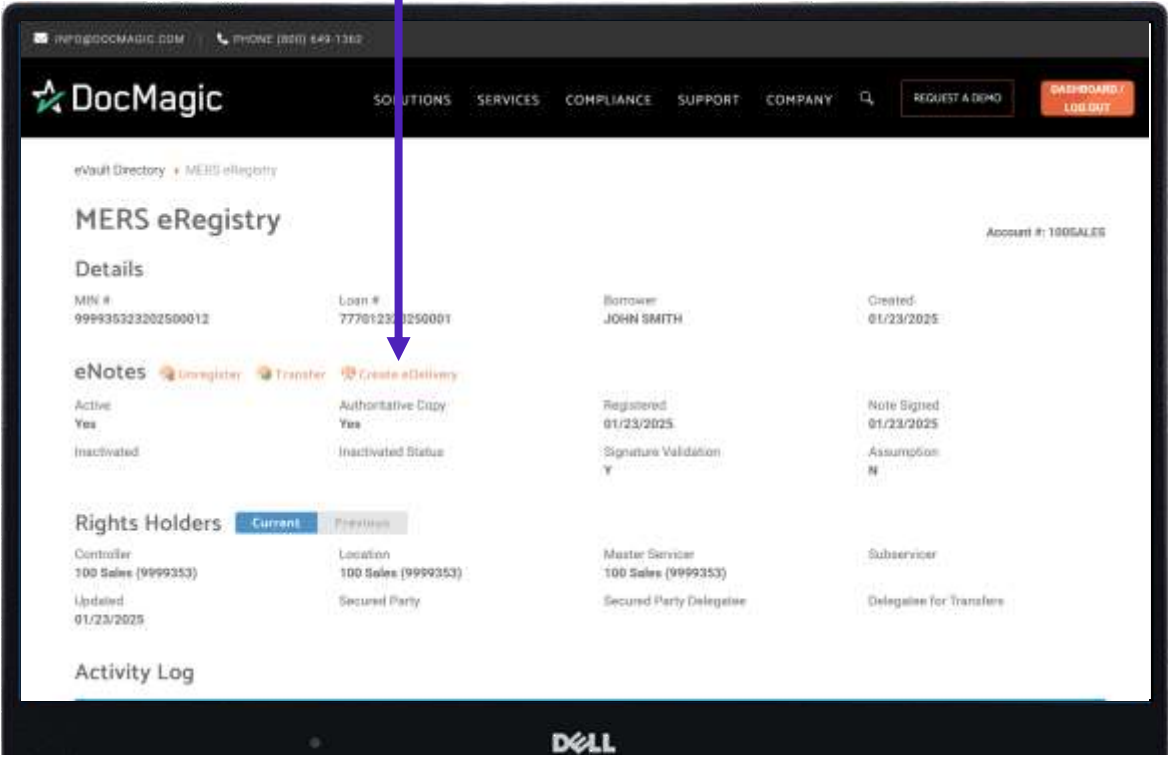


Refresh the page after a few seconds to see if the transaction was successful.

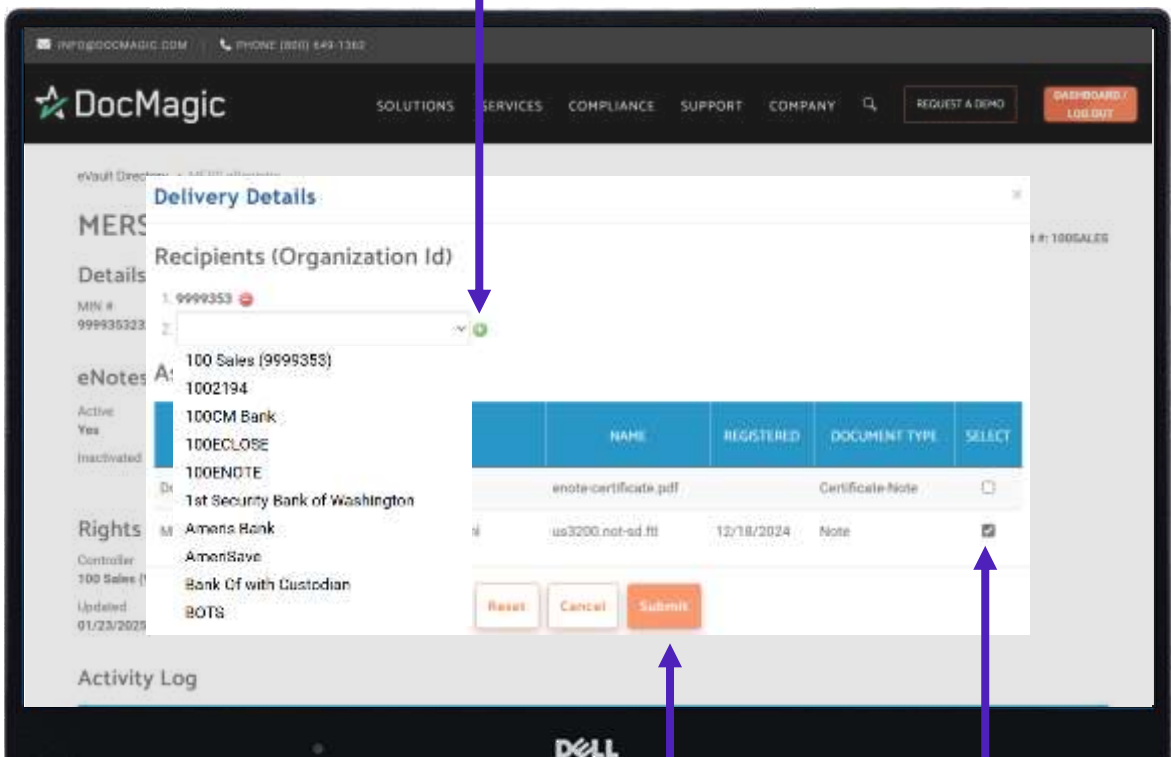




Create eDelivery means sending a copy – not the authoritative copy.



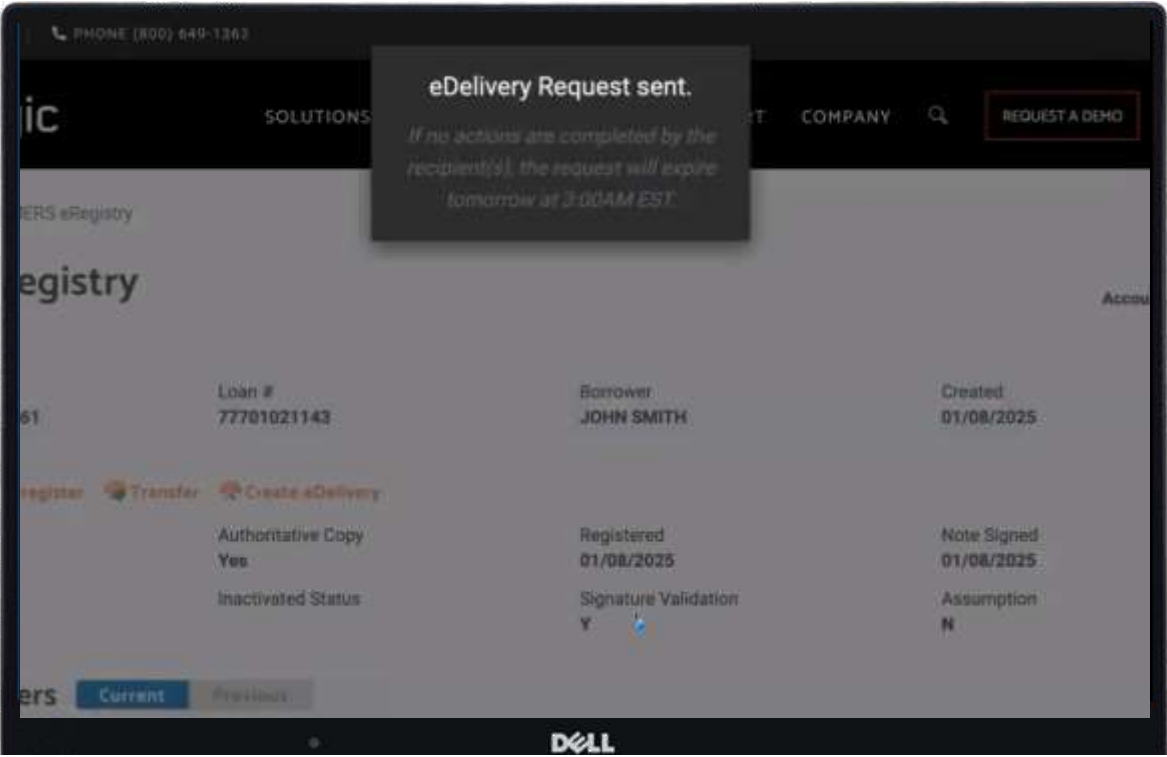
Find your recipient(s) from the drop down and click the green plus button to add.



Select the asset(s) you want to send and then Submit your request.



You'll get this confirmation message when your request is sent.



MERS uses the tracking numbers to validate transactions.

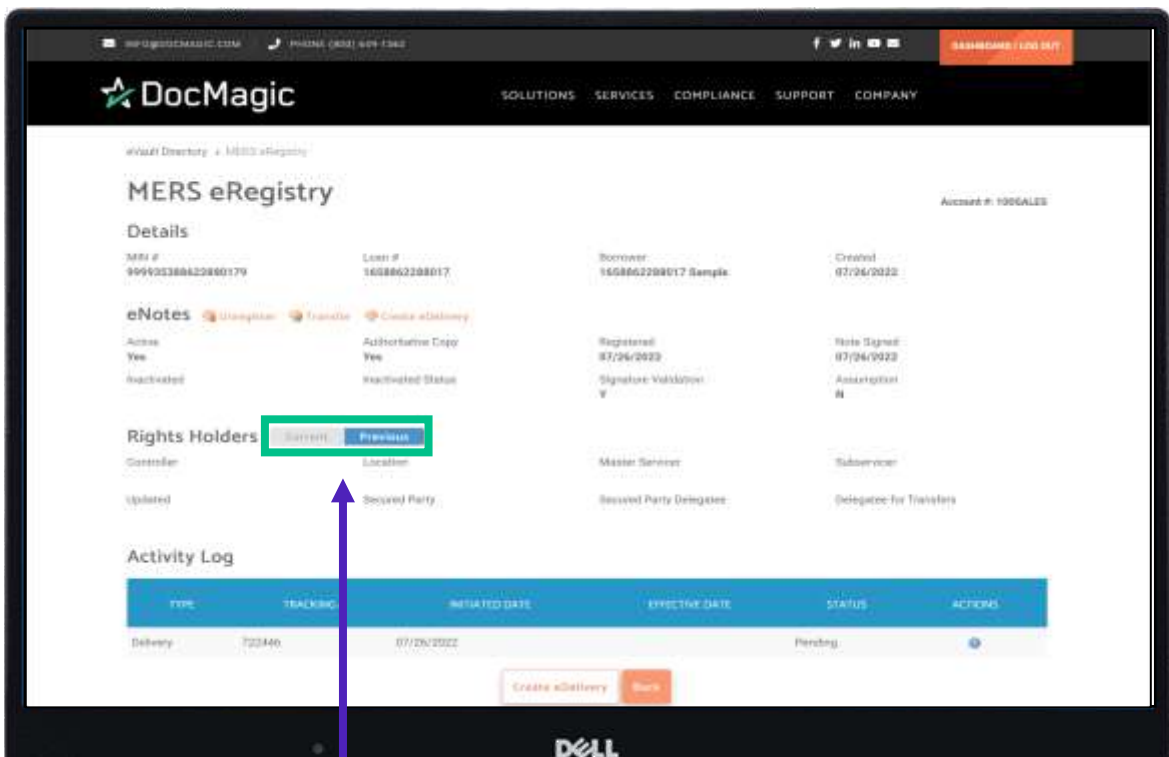
The screenshot displays the DocMagic MERS eRegistry interface. The page title is "MERS eRegistry" with a record ID of "Record # 10001008". The "Details" section includes fields for MRS # (0000070210010048), Loan # (3310001004), Borrower # (SAMMY SAMPLE), and Created (03/01/2021). The "eNotes" section shows "Active: Yes" and "Authorized Copy: No". The "Rights Holders" section lists "DocMagic eClass" as the location and "Secured Party" as the role. The "Activity Log" table below shows two entries:

TYPE	TRACKING	INITIATED DATE	EFFECTIVE DATE	STATUS	ACTIONS
Delivery	468007	03/12/2021		Success	
Transfer	1000008	03/12/2021	03/12/2021	Success	

Here you can see the location of the rights holders which correspond with the Authoritative Copy.



Finally, you can toggle between the Current and Previous Rights holders.



“Previous” Rights Holders will be transferred until the rights are moved or transferred again. Then there will be new Previous Rights Holders.

