

## SmartSAFE®

DocMagic's Proprietary eVault Solution

#### What's in the eVault?





#### Navigating to the eVault

Go to www.docmagic.com





#### Launch eVault



We also recommend that you check out our guide to SmartRegistry<sup>™</sup> which can be found on our <u>Product Training Page</u>.



#### eVault Directory

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

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



#### Action Icons

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

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#### Assets Page





View Assets

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

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XML

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.





#### Asset Actions

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

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



#### View the eNote

## 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.



#### Information Icon

The Information icon brings up additional details about the eNote.

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



#### Adding Documents





#### 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. INFORCOCMADIC.COM J PHONE (800) 645-1262 f ¥ in 🖬 🗃 🛠 DocMagic SOLUTIONS SERVICES COMPLIANCE SUPPORT COMPANY Upload Asset Choose File Achieving Ex\_012725.docx File Name:\* Title.\* Assumption Agreement Document Class: Format kt: Reference ld: eNote? Cancel Opland DELL Click Upload to confirm.



### Adding Documents

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#### 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.

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



#### MERS Page

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

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#### MERS Page

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The Account Number can be found here.



#### 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.





### eNote Capabilities

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These functions will be explained in the slides below.



#### 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.





#### Unregister the eNote

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

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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.





### Register the eNote

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#### Red Exclamation = Inactive eNote

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#### MERS Transfer Window

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



#### MERS Transfer Window





#### 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".

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Location

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





#### Change In Status

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





#### Change In Status

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

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

