

# How Solution Manager helps you deal with a deal on hold

Upon receipt of your RegUSA® deal submission, our processing service team may identify document compliance or data accuracy discrepancies preventing transaction completion.

Solution Manager will alert and enable you to correct or append the submission within the application avoiding follow-up phone calls and emails back with our processing service team which delay deal completion.

## Step 1

Open the Solution Manager from the Deal Status Queue by selecting any (!) icon in the Problem Status column.

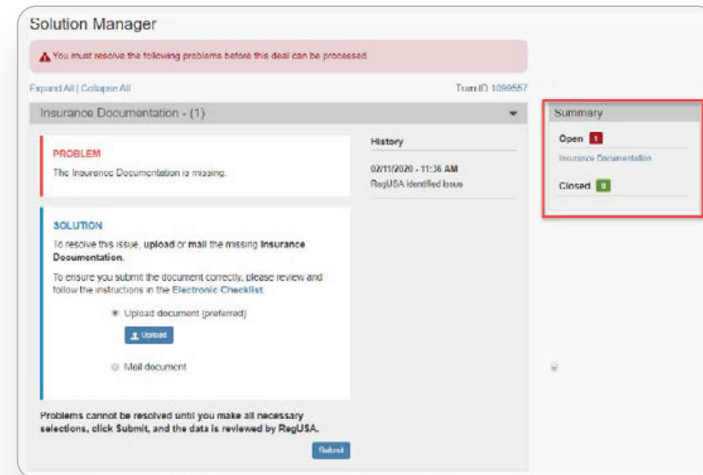
| Expected Return Date | Primary Contact           | Tran ID | VIN    | Reg State | Status    | Problem Status |
|----------------------|---------------------------|---------|--------|-----------|-----------|----------------|
|                      | Upload, EGTrip            | 1099579 | 825524 | PA        | In Review |                |
|                      | Upload, EGTrip            | 1099571 | 826503 | PA        | In Review |                |
|                      | Label Difference, #03Trip | 1099570 | 031403 | NC        | In Review |                |
|                      | Upload, EGTrip            | 1099554 | 025576 | PA        | In Review |                |
|                      | Mismatch, EGTrip          | 1099551 | 115148 | NY        | In Review |                |
|                      | Issd, Revisd              | 1099719 | 210119 | CA        | Returned  |                |
|                      | Dealers, NY               | 1099710 | 111111 | NY        | Returned  |                |

## Step 2

Select **Open** in the **Summary** box located on the right of the Solution Manager.

## Step 3

Review the current issue under **PROBLEM** which is unique to each state transaction type.



The screenshot shows the Solution Manager interface for a deal on hold. A red box highlights the Summary section on the right, which contains an 'Open' button with a red exclamation mark icon and a 'Closed' button with a green checkmark icon. The main content area displays a 'PROBLEM' section with the text 'The Insurance Documentation is missing.' and a 'SOLUTION' section with instructions to upload or mail the missing insurance documentation. A 'Submit' button is visible at the bottom of the solution section.

## Step 4

Review the action required under **SOLUTION**.  
Common action steps include:

- Uploading a document
- Mailing an original document
- Accepting or declining a fee
- or tax discrepancy

Follow the instructions and select Submit.

## Step 5

The **Open** status in the **Summary** box located on the right of the Solution Manager will update to **Pending Review**.

Repeat steps 3 & 4 for any additional problems displayed.

## Step 6

Submissions pending review will display as a dotted circle icon under the **Problem Status** column in the Deal Status Queue.

| Expected Return Date | Primary Contact     | Tran ID | VIN    | Reg State | Status    | Problem Status |
|----------------------|---------------------|---------|--------|-----------|-----------|----------------|
|                      | Upload, EGTrip      | 1099579 | B25524 | PA        | In Review | ⋮              |
|                      | Upload, EGTrip      | 1099571 | B26403 | PA        | In Review | ⋮              |
|                      | Transference, FGTrp | 1099570 | D31403 | NC        | In Review | ⋮              |
|                      | Upload, EGTrip      | 1099554 | B25576 | PA        | In Review | ⋮              |
|                      | Mismatch, EGTrip    | 1099551 | 115168 | NY        | In Review | ⋮              |
|                      | Test, Hevse         | 1099739 | 210119 | CA        | Returned  | !              |
|                      | Dealer, NY          | 1099718 | 111111 | NY        | Returned  | !              |

## Step 7

The RegUSA processing service team will review the resolution submission.

If accepted, the status under the **Problem Status** column in the Deal Status Queue will update to a ✓ icon.

If additional action is required, the status will return to a (!) icon. Select the (!) icon and repeat steps 3 & 4.

| Expected Return Date | Primary Contact       | Tran ID | VIN    | Reg State | Status    | Problem Status |
|----------------------|-----------------------|---------|--------|-----------|-----------|----------------|
|                      | Mismatch, EGTrip      | 1099577 | 115195 | NY        | In Review | ✓              |
|                      | Mismatch, EGTrip      | 1099574 | 115143 | NY        | In Review | ✓              |
|                      | Upload, Testing       | 1099556 | B25558 | PA        | In Review | ✓              |
|                      | Transference, Testing | 1099549 | D31430 | NC        | In Review | ✓              |