

RMA PROCESS MASTER FILE

L1 oversees placing orders (replacements and new orders) and making sure defective units also get returned.

Type of orders:

SI= Sales order

RMAS= Replacement order (outbound)

RMAR= Return (inbound)

“RMA” is **Return Merchandise Authorization**. When the unit is defective, we provide the customer with a replacement, once they receive the replacement, they need to return the defective unit.

The process varies depending on the customer, shipping method, unit model and country.

After the ticket is escalated to L2 for an RMA request, L2 will review it and approve or deny the RMA request. **All RMAs need to be approved by L2.**

Once the RMA is approved, the ticket will be kicked back to L1 with the following note:

 **Solis** added a private note
4 days ago (Thu, Dec 11 2025 at 5:24 AM)

 **Notified to:** eddie@solisinverters.com

An RMA has been requested for this unit. Please review the case and determine if an RMA is recommended.

To know when and how to create an RMA Tag and a Return Shipping Label please refer to these SOP:

- **RMA Tag SOP**
- **Return Shipping Label SOP**

RMAS FOR THE USA (REGULAR CUSTOMERS)

After the approved by L2. Do the following:

STAGE 1: SETTING UP THE TICKET

Type *

FailureType *

WO Number

RMA Approval date *

RMA Number *

SerialNumberDuplicate

1. Change ticket type from “troubleshooting” to “RMA”.
2. Fill the “RMA Number” field, the RMA number is the date of the approval + serial number, in this example this SN was approved for RMA on 12/12/2025. The day must go first.
3. Enter the date the RMA got approved in the “RMA Approval date”.
4. Hit “**update**” on the ticket.
5. Send canned response “**RMA Approved – All Units**” to the customer, this will give them a form they need to fill out.
6. Set ticket to “**waiting for customers response**”
7. **Ticket will reopen once customer replies.**

Ticket will reopen with customer’s information

Matthew Caldwell filled out the canned form you sent
 2 days ago (Fri, Dec 12 2025 at 12:19 PM)

Delivery Contact
Matt Caldwell

Contact Phone Number
7123047587

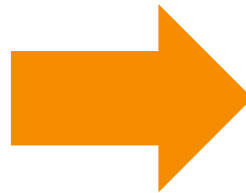
Street Address
638 219th Street

City and State/Province
Ogden

Postal/Zip Code
50212

Tax ID (If located in Canada or Puerto Rico)
 No information was provided

Use this information to fill
properties pane:



RMAContact

RMAContact Phone Number

Street Address

City

State

Zip Code

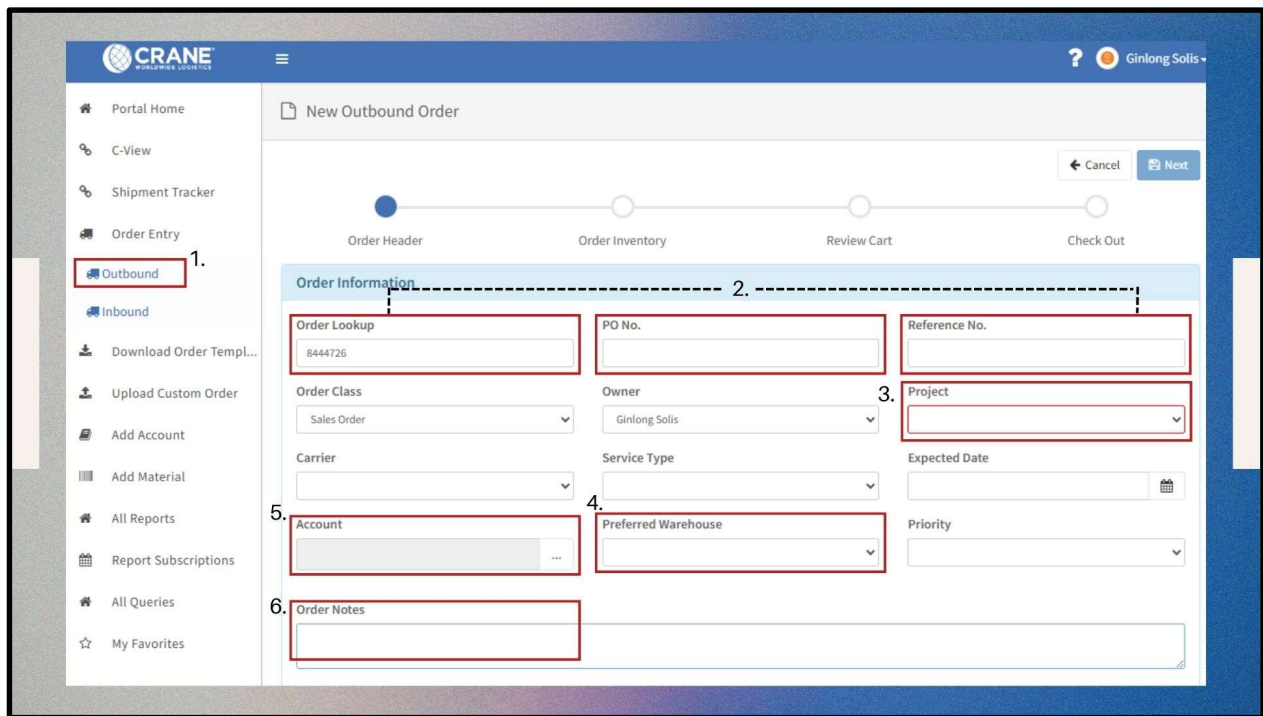
Country *

1. After transferring shipping information to ticket properties.
2. Hit **“update ticket”**
3. Send canned response **“RMA Information to Customer”** this will give the customer a summary of the replacement order.
4. Attach Return Tag if applicable on a note.
5. Attach FedEx Return Label if applicable on a note.

STAGE 2: PLACING THE ORDER IN FOOTPRINT/CRANE

Step 1

Place the order in Footprint



The screenshot shows the 'New Outbound Order' form in the CRANE system. The form is divided into several sections with numbered annotations:

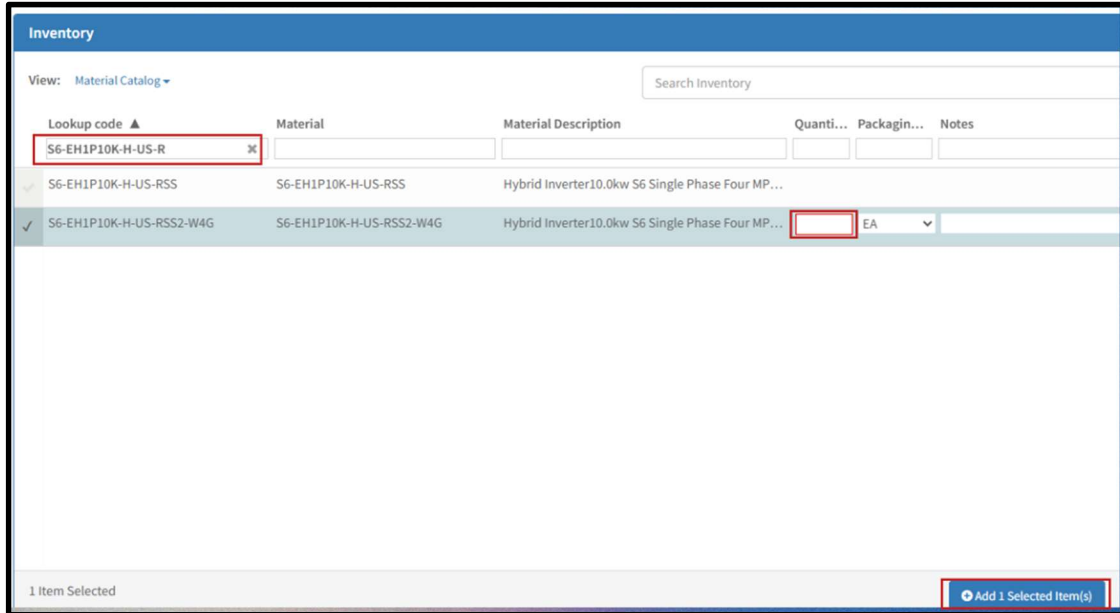
- 1.** Points to the 'Outbound' option in the left-hand navigation menu under 'Order Entry'.
- 2.** Points to the 'Order Information' section header.
- 3.** Points to the 'Owner' dropdown menu, which is set to 'Ginlong Solis'.
- 4.** Points to the 'Preferred Warehouse' dropdown menu, which is set to 'SFO'.
- 5.** Points to the 'Account' dropdown menu.
- 6.** Points to the 'Order Notes' text area at the bottom of the form.

The form includes fields for Order Lookup (8444726), PO No., Reference No., Order Class (Sales Order), Project, Carrier, Service Type, Expected Date, Priority, and a 'Next' button.

1. Should be set to “outbound” as this is an order we are shipping out.
2. All 3 fields need to have the same reference “RMA-*Ticket number*”.
3. Inventory to use to fulfill order, “Ginlong-RMAS”
4. Warehouse will always be “SFO”
5. Look for the name of the company we are shipping to. Once selected look for the contact information provided by the customer. If the company/contact is not saved, you may add them by clicking “new account” or “new contact” respectively.
6. Sign with your name.

Step 2.

Look for the material(s) you need to add to the order and quantity (**replacement orders are always Qty. 1**). The materials need to be an exactly the same as the one being replaced, enter the quantity and lastly click on “add item”



Inventory

View: Material Catalog

Search Inventory

Lookup code ▲	Material	Material Description	Quantity	Packaging	Notes
S6-EH1P10K-H-US-R					
S6-EH1P10K-H-US-RSS	S6-EH1P10K-H-US-RSS	Hybrid Inverter10.0kw S6 Single Phase Four MP...			
✓ S6-EH1P10K-H-US-RSS2-W4G	S6-EH1P10K-H-US-RSS2-W4G	Hybrid Inverter10.0kw S6 Single Phase Four MP...	1	EA	

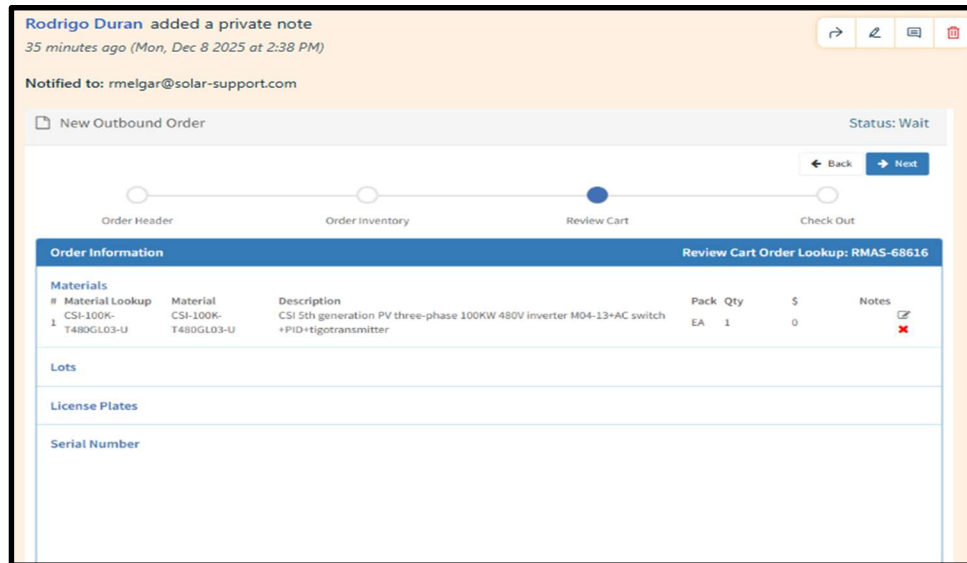
1 Item Selected

Add 1 Selected Item(s)

Step 3

After you finish adding all the items click next to the upper right corner, it will show you a summary of the order you are placing. **Take a screenshot and add it on a note on the ticket.**

Example:



Rodrigo Duran added a private note
35 minutes ago (Mon, Dec 8 2025 at 2:38 PM)

Notified to: rmelgar@solar-support.com

New Outbound Order

Status: Wait

Order Header Order Inventory Review Cart Check Out

Review Cart Order Lookup: RMAS-68616

#	Material Lookup	Material	Description	Pack	Qty	\$	Notes
1	CSI-100K-T480GL03-U	CSI-100K-T480GL03-U	CSI 5th generation PV three-phase 100KW 480V inverter M04-13+AC switch +PID+ttgotransmitter	EA	1	0	

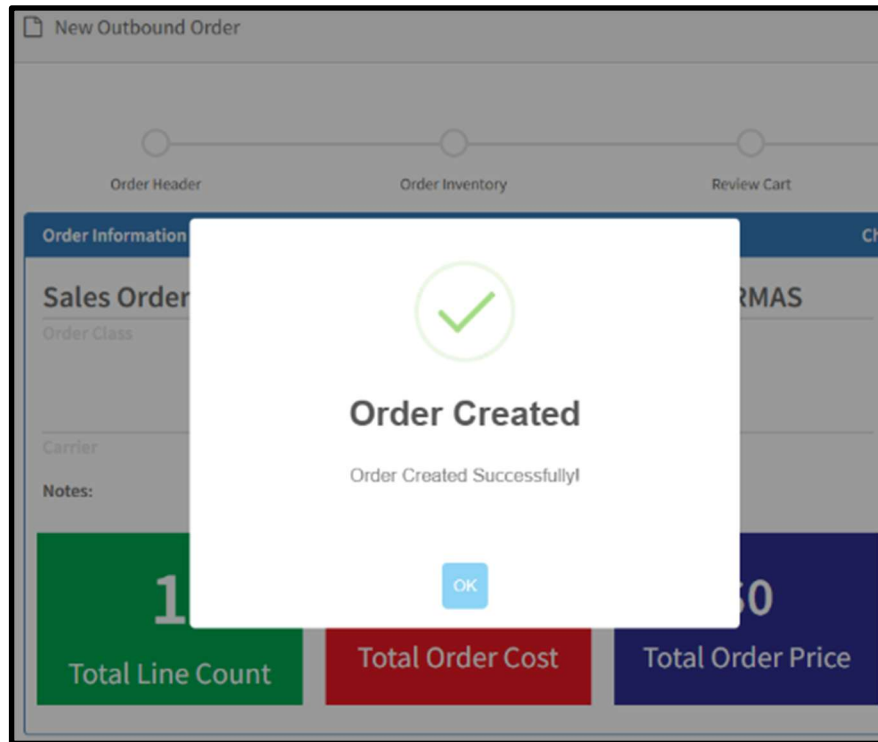
Lots

License Plates

Serial Number

Step 4

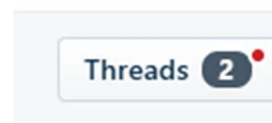
Review the order summary and click “next” again. **Wait until the button changes to “finish”, click “finish” and the next message will show up. Take a screenshot and add it on the same note as your previous screenshot of the order summary.**



Hit ok. Your order will have been submitted!

Next, you need to make sure to notify Crane that the order has been submitted, that they need to process it and let them know how they need to ship it (FedEx or OMNI)

Follow the next steps to notify Crane of the order:

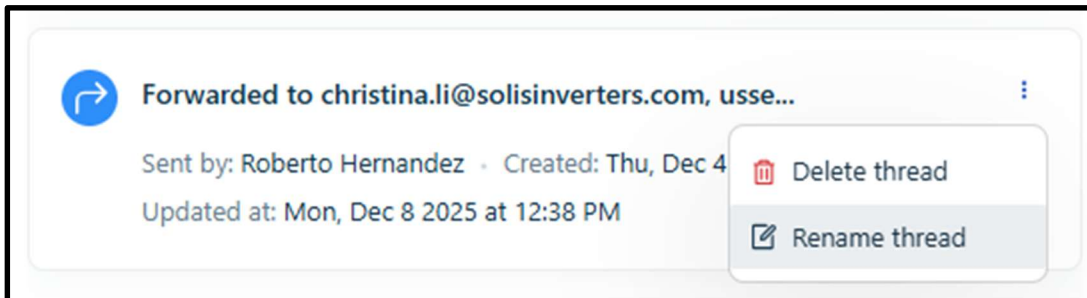


- Open a new thread on the ticket . Select “Create new” and choose “forward this ticket”
- Use canned response “RMAS-OMNI” or “RMAS-FedEX”, depending on the type of item we are replacing, 3P ship via OMNI, 1P and accessories ship via FedEx.
- Edit the template by adding the materials, quantities and shipping information provided by customer (**only “RMAS-FedEX” will ask for shipping information to be added**)

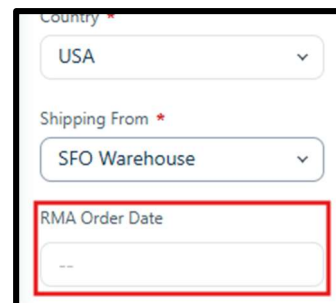
- The canned response includes the emails of the people that need to be added to the email request, copy and paste them on the “To” section and make sure to erase them from the body of the email.
- Change the subject to the order’s reference number. “RMAS-ticket number”



- Send the order and rename thread to the order’s reference number as well



- Once Crane has been notified, **enter the order date on ticket properties**
- set ticket to “**order being processed**”

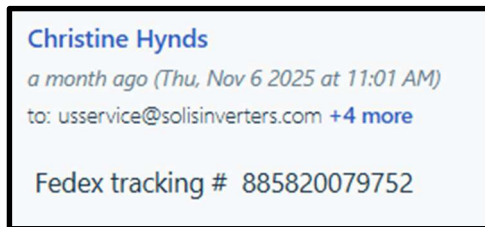


*** TICKET WILL REOPEN WHEN CHRISTINE HYNDNS CONFIRMS ORDER HAS BEEN PROCESSED ***

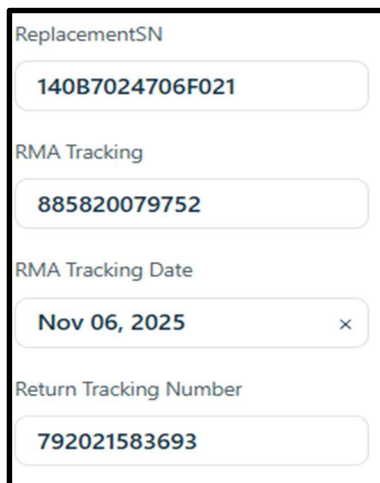
Scenario 1:

When requested to ship via FedEx.

- Christine will reply on the order thread with a FedEx tracking number



Add the following information on the properties pane:

A screenshot of the properties pane in a software interface. It contains four fields: ReplacementSN (140B7024706F021), RMA Tracking (885820079752), RMA Tracking Date (Nov 06, 2025), and Return Tracking Number (792021583693).

- Replacement SN:** look for replacement SN on your email notifications.
- RMA tracking:** FedEx tracking number previously provided
- RMA tracking date:** date when Crane proves said tracking
- Return tracking number:** Tracking number of the return FedEx label, if applicable.
- Hit **“Update ticket”** once this information has been added to save the changes.

- Send canned response **“1P unit shipped”** to customer. **(Attach RMA tag and return shipping label to this response if applicable)**
- The ticket will be set to **“Return RMA”** automatically after sending the canned response.

Scenario 2:

When requested to ship via OMNI.

- Christine will reply with freight dims and weight

Hello,

Please see dims and weight

RMAS-65864 1 PLT TOTAL

1 PLT @ 35X32X22 = 145 LBS

Thanks. 😊

- Use canned response “**Pallet info to OMNI**”
- Make sure that the following sections are edited accordingly on the canned response:

Order: **RMAS-65864**

Customer: Angelique Wood

Business: LMD Solar LLC

Address: 1285 Longbridge Trail, Walshville, IL, 62091

delivery POC Phone: 217-313-5788

Dims and Weight:

1 PLT @ 35X32X22 = 145 LBS

- Order:** must have the “**RMAS-ticket number**” reference
- Customer, business and address:** will be the shipping information, it should be pasted automatically when using that canned response.
- Dims and weight:** Copy and paste the same information provided by Christine.
- The canned response will include OMNI's email (**controltower5@omnilogistics.com**), copy and paste it on the “To” section with the rest of the emails looped and delete it from the email you are about to send.

To: christina.li@solisinverters.com x
sfwarehouse@craneww.com x
controltower5@omnilogistics.com x

Cc:

Bcc:

controltower5@omnilogistics.com

- Send email and set ticket to “24hreopen”

*** TICKET WILL REOPEN WHEN OMNI PROVIDES THE BOL NUMBER***

Re: RMAS-65864 // 9664496

phxforwarding
2 months ago (Tue, Oct 28 2025 at 2:33 PM)
to: usservice@solisinverters.com +7 more

Good Afternoon,

I've attached the BOL and Labels for you.

Feel free to reach out if there's anything else we can help you with!

Natalie 🍊👋

- OMNI will add the BOL number on the ticket subject. OMNI will also provide shipping documents, those are used by Crane, **you do not need them.**

Add the following information on the properties pane:

ReplacementSN

1811480254240002

RMA Tracking

9664496

RMA Tracking Date

Oct 28, 2025 x

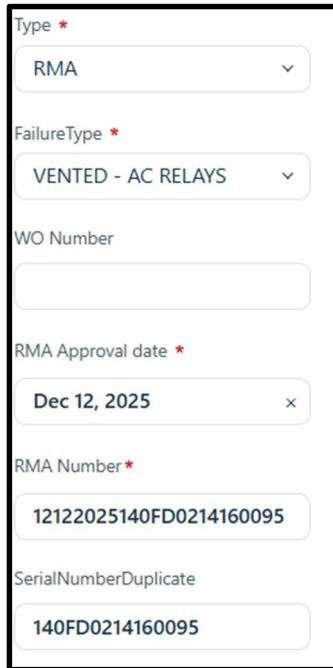
- **Replacement SN:** look for replacement SN on your email notifications.
- **RMA tracking:** Paste BOL number provided by OMNI
- **RMA tracking date:** date when OMNI proves said tracking
- Hit “**update ticket**” to save changes.
- Send canned response “**3P unit shipped**” to customer. (**Attach RMA tag to this response**)
- The ticket will be set to “**Return RMA**” automatically after sending the canned response.

RMAS FOR THE USA (CANADIAN SOLAR ONLY)

Canadian Solar (CSI) RMA process varies in a few details. They only work with 3P units.

After the approved by L2. Do the following:

STAGE 1: SETTING UP THE TICKET

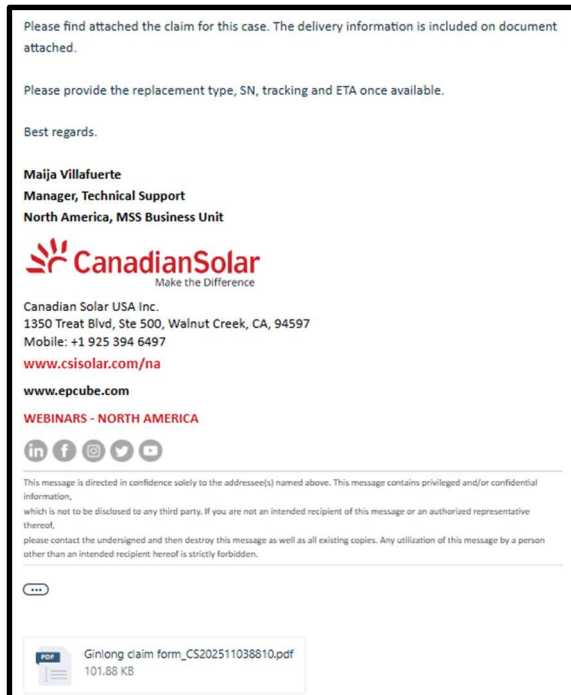


The screenshot shows a form for setting up an RMA ticket. The fields are as follows:

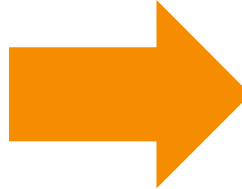
- Type ***: A dropdown menu with "RMA" selected.
- FailureType ***: A dropdown menu with "VENTED - AC RELAYS" selected.
- WO Number**: An empty text input field.
- RMA Approval date ***: A date picker showing "Dec 12, 2025".
- RMA Number ***: A text input field containing "12122025140FD0214160095".
- SerialNumberDuplicate**: A text input field containing "140FD0214160095".

1. Change ticket type from “troubleshooting” to “RMA”.
2. Fill the “RMA Number” field, the RMA number is the date of the approval + serial number, in this example this SN was approved for RMA on 12/12/2025. The day must go first.
3. Enter the date the RMA got approved in the “RMA Approval date”.
4. Hit **“update”** on the ticket.
5. Send canned response **“CSI – RMA Approved”** to the customer; this will ask them to send over a claim.
6. Set ticket to **“waiting for customers response”**
7. **Ticket will reopen once customer replies.**

*** TICKET WILL REOPEN WHEN CSI SENDS CLAIM FILE***



Use the PDF attached to transfer shipping information onto the ticket properties



RMAContact	
Mike Post	
RMAContact Phone Number	
325-574-4768	
Street Address	
1304 College Ave	
City	
Snyder	
State	
TX	
Zip Code	
79549	
Country *	
USA	

- Hit **“update ticket”** to save changes.
- Send canned response **“RMA Information to CSI”**
- **FOLLOW THE SAME PROCESS STATED ABOVE TO PALCE THE ORDER.**

Canadian Solar only works with 3P units, follow the same process above marked as **“STAGE 2: PLACING THE ORDER IN FOOTPRINT/CRANE”** and when the order gets processed you will have to **follow scenario 2**, since it will be shipped via **OMNI**.

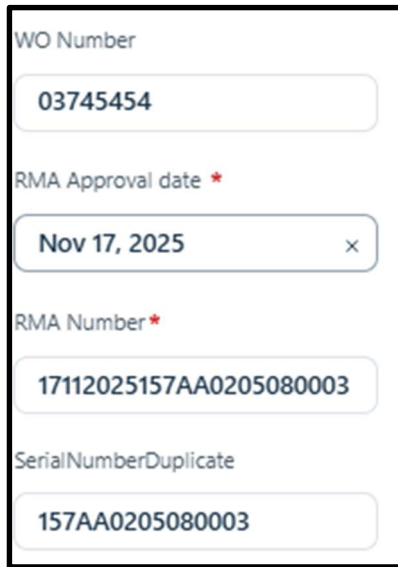
***The only difference between RMAs that go to Canadian Solar is that instead of us providing them a form to be filled out, they provide us a file, so make sure to send them the correct canned response. The rest is done the same way.**

RMAS FOR THE USA (SUNRUN ONLY)

Sunrun RMA process varies in a few details. They only work with 1P and maybe other accessories. Also, **we do not ship out replacements, they have their own stock that they use to replace the defectives that have been approved to be replaced.**

After the approved by L2. Do the following:

STAGE 1: SETTING UP THE TICKET



The screenshot shows a form with the following fields and values:

Field Label	Value
WO Number	03745454
RMA Approval date *	Nov 17, 2025
RMA Number *	17112025157AA0205080003
SerialNumberDuplicate	157AA0205080003

1. Change ticket type from “troubleshooting” to “RMA”.
2. Fill the “RMA Number” field, the RMA number is the date of the approval + serial number, in this example this SN was approved for RMA on 12/12/2025. The day must go first.
3. Enter the date the RMA got approved in the “RMA Approval date”.
4. Make sure there is a Work Order Number WON on the ticket field.
5. Hit “**update**” on the ticket.
6. Create RMA tag and return label if applicable.
7. Send canned response “**RMA approved – Sunrun**”

Attach tag and label and make sure to CC the emails on

this canned response and add the email of the warehouse linked to the branch (check this [article](#) to see branch email)

8. Send email and the ticket will be set to “**ReturnRMA**” automatically.