

# RMA Processing

## 1. Guiding Principles

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**Note that RMAs can be time sensitive and that all efforts to get them done within manufacture time requirements must be made.**

- Upon recognizing possible RMA, Service Coordinator (SC), Service Staff, or a technician contacts manufacturer.
- The manufacturer will provide an initial case number.
  - **Initiating employee must keep track of the related case numbers.**
  - SC will use [RMA@solargaininc.com](mailto:RMA@solargaininc.com) for all RMA communication with manufacturers.
    - This step informs service of the ongoing status of the RMA and improves visibility.
  - SC will input RMA case number (sometimes called RMA tracking number) into [RMA tracking sheet](#).
- The manufacturer will provide a new case number upon approval.
  - **Initiating employee must keep track of the related case numbers.**
- Important data to keep track of
  - Additional manufacturer required field documentation (photos, device serial numbers, etc.). *It is critical to record site data for RMAs.*
  - **Manufacturer timelines for returns and reimbursements.**
  - Log when equipment is shipped, received, replaced, returned, etc.
- There can be financial consequences from the manufacturers due to failure to follow manufacturer requirements.
  - Financial consequences can include freezing Solar Gains account, billing for the device, etc.

## Procedure

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- Contact manufacturer
- Use [RMA@solargaininc.com](mailto:RMA@solargaininc.com) to:
  - Facilitate RMA process with manufacturer.
  - Alert service team of case number.
- Record RMA case number into [RMA Tracker](#)
- Document manufacturer required documentation.
  - Varies from manufacturer, but can include items such as:
    - Shipping details
    - Device PN/SN
    - Meter Readings
    - Test data
    - Photos
- Obtain approval from manufacturer.
  - Provided required info to manufacturer as instructed.
  - Update RMA tracker.
- Receive RMA
  - Save shipping documents for returning faulty devices.
  - Verify device info.
  - Update RMA tracker.
- Return any faulty devices as per manufacturer requirements.
  - Use bill of lading (BOL) / documents for shipping.
  - Update RMA tracker.
- Submit reimbursement and stipend claims to manufacturer.
  - Each manufacturer has unique requirements for processing their claims. Utilize the information from the RMA tracker to submit claims.
  - Submit invoice to accounting.
    - Or coordinate submissions using manufacturer's system for processing.
  - Update RMA tracker.

## 2. Acronyms

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- **RMA:** Return Merchandise Authorization is a part of the process of returning a product to receive a refund, replacement, or repair during the product's warranty period.
- **BOL:** Bill Of Lading is a detailed list of a shipment of goods in the form of a receipt given by the carrier to the person consigning the goods.