

Enphase Service Manager Guide

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Introduction to the Enphase Service Manager

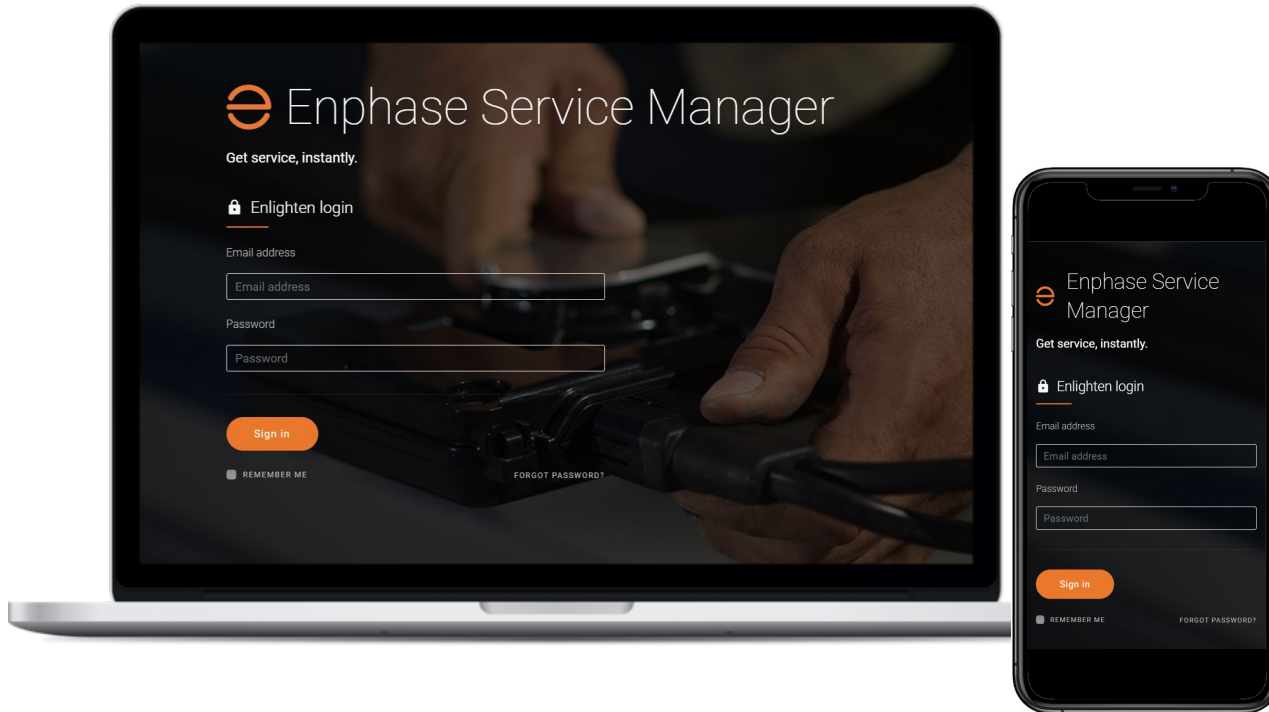
The Enphase Service Manager is a unified platform where installers can create and manage all their support requests.

The Enphase Service Manager can be used to create new support requests, track return merchandise authorization (RMA), apply and track labor reimbursements, initiate returns, and more.

This guide provides information on how to use the Enphase Service Manager on both mobile and desktop views.

Introduction to the Enphase Service Manager

Log in to the Enphase Service Manager on a desktop or mobile device using your Enphase account credentials.



Enphase Service Manager

Enphase Service Manager Guide

Mobile view

Enphase Service Manager Mobile View:

Learning objectives

- Understand how to view RMAs and Cases in the Dashboard.
- Understand how to use the Search tool.
- Understand how to create a new RMA.
- Understand how to apply for and track Labor Reimbursements.
- Understand how to Initiate Returns.
- Understand how to access system information.
- Understand how to run reports.
- Understand how to view the Profile.

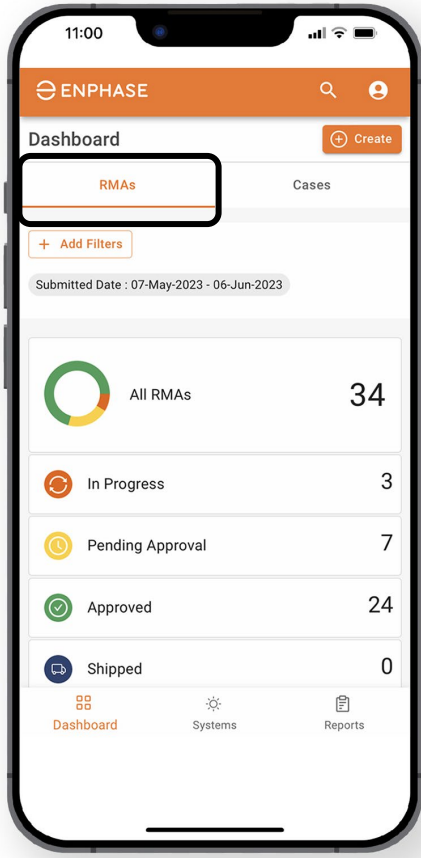
Enphase Service Manager Guide

Mobile view

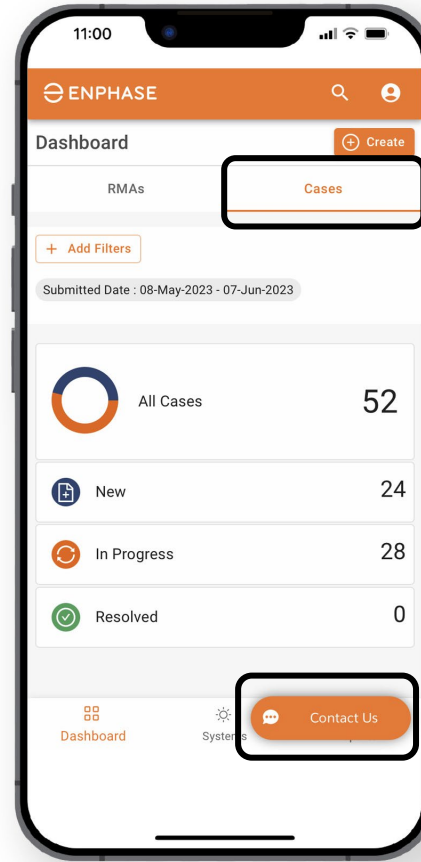
Dashboard

Dashboard: Overview

The **Dashboard** gives installers access to create, view, and manage all cases and RMAs.



To view RMA information on the Dashboard, select the **RMAs** tab.

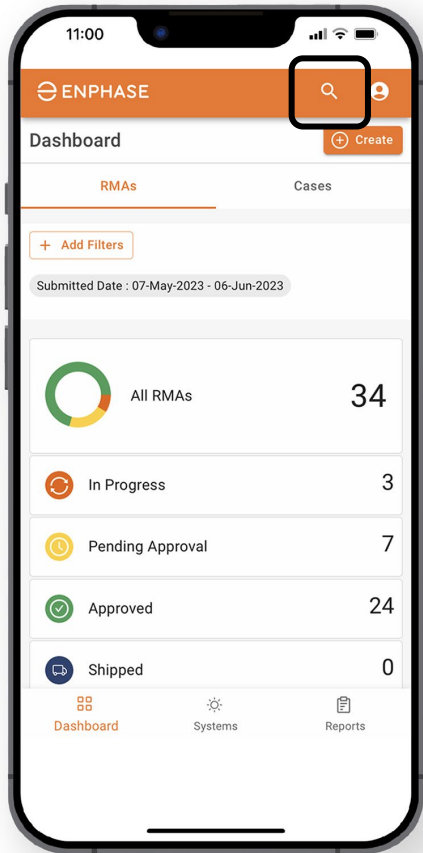


To view case information on the Dashboard, select the **Cases** tab.

Installers can start a live chat with Enphase Customer Support at any time by selecting the **Contact Us** option.

Dashboard: Search tool

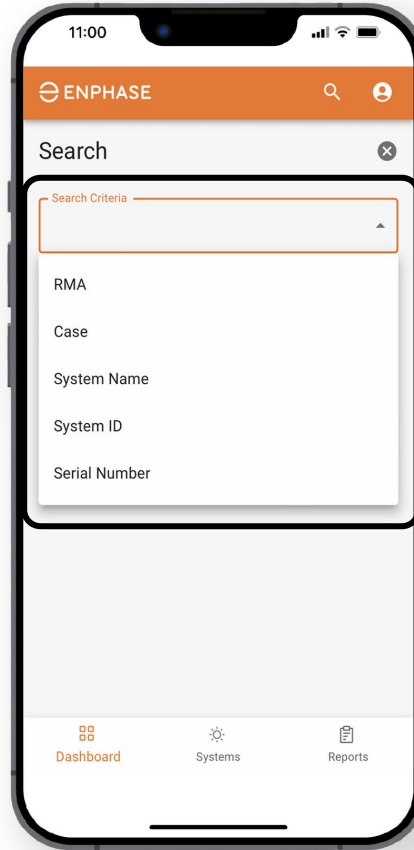
Installers can use the **Search** tool to find a specific case or RMA.



Step 1

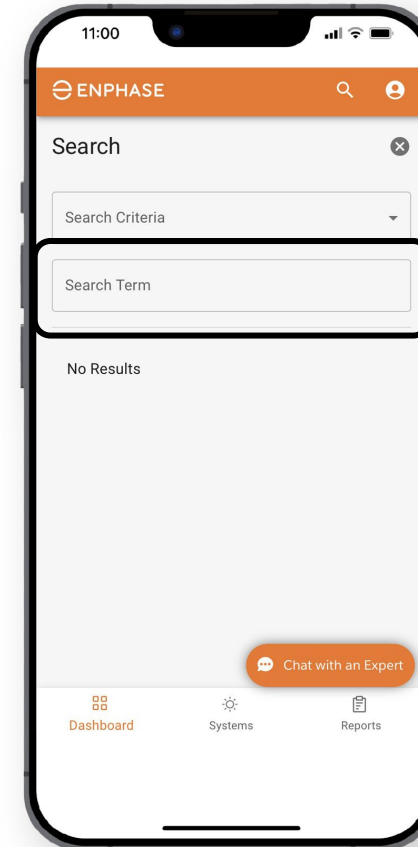
Search for a specific RMA or case by selecting the magnifying glass icon at the top of the page.

The **Search** menu will open.



Step 2

From the **Search Criteria** dropdown, installers can search for an RMA, Case, System Name, System ID, or Serial number.

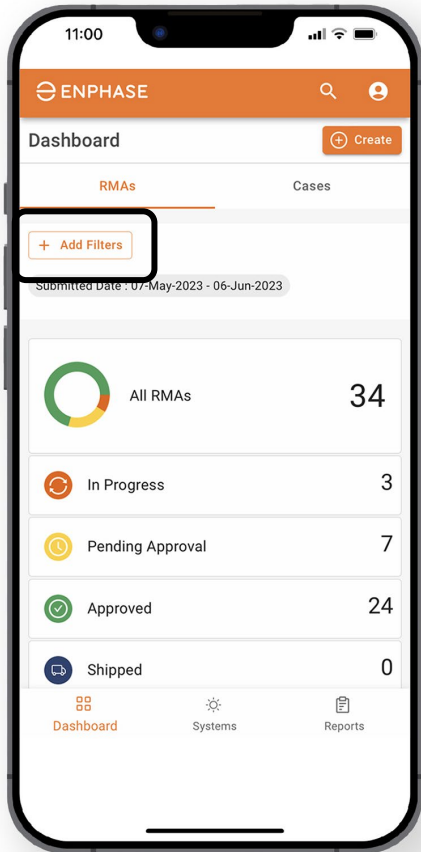


Step 3

Once a criteria is selected, the installer can use the **Search Term** field to search.

Dashboard: Add Filters

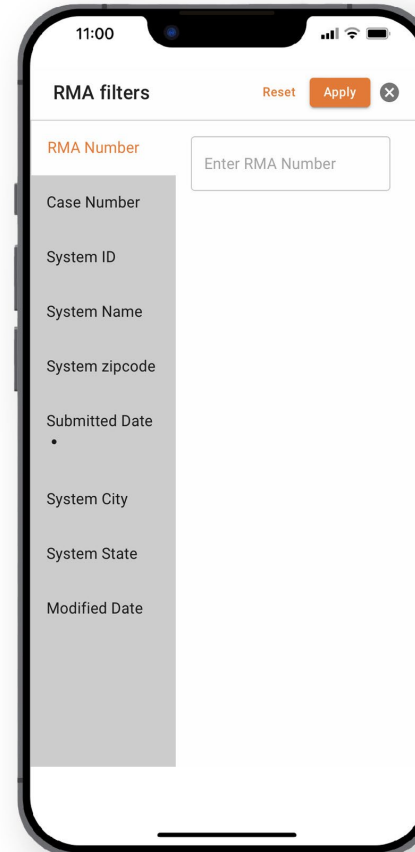
Installers can also select the **Add Filters** option in the **RMA Dashboard** and **Cases Dashboard** to find a specific case or RMA.



Step 1

From the **RMA dashboard** or **Cases dashboard**, select **Add Filters** to view filter options.

The default filter will show all RMAs within the last 30 days.



Step 2

If **Add Filters** was selected from the **RMA Dashboard**, the **RMA filters** page will open.

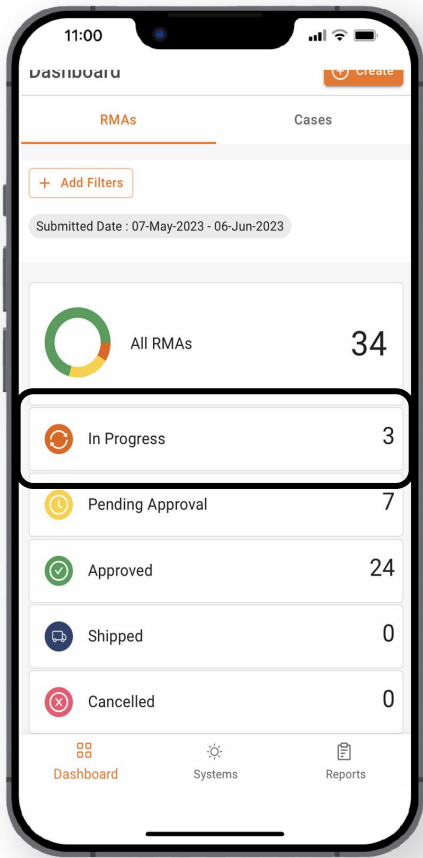
If **Add Filters** was selected from the **Cases Dashboard**, the **Cases filters** page will open.

Select specific filter options and add information in the provided field.

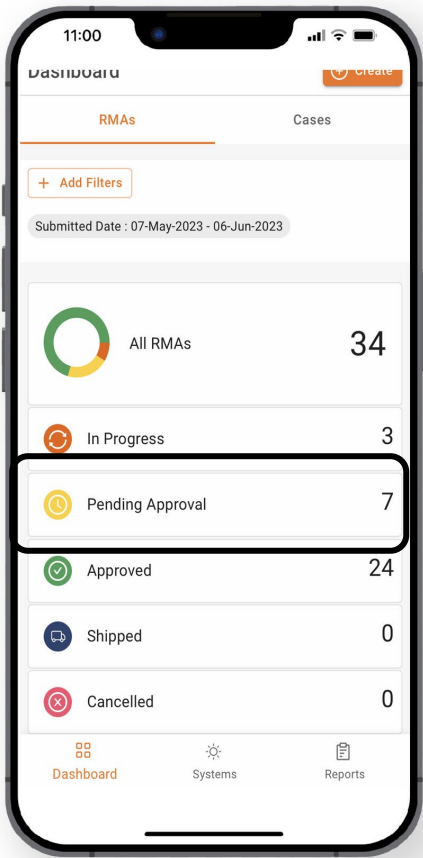
Select **Apply**.

Dashboard: RMAs

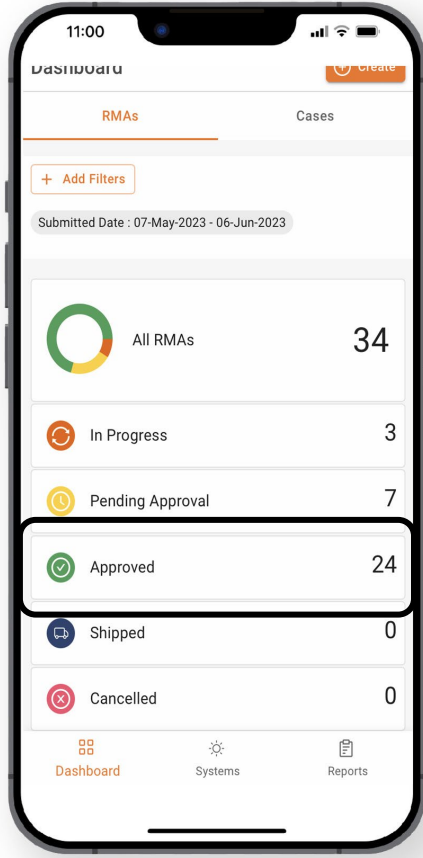
Installers can view their total number of RMAs and specific RMA information in the **RMAs** tab of the **Dashboard**.



To view a list of in-progress RMAs, select **In progress**.



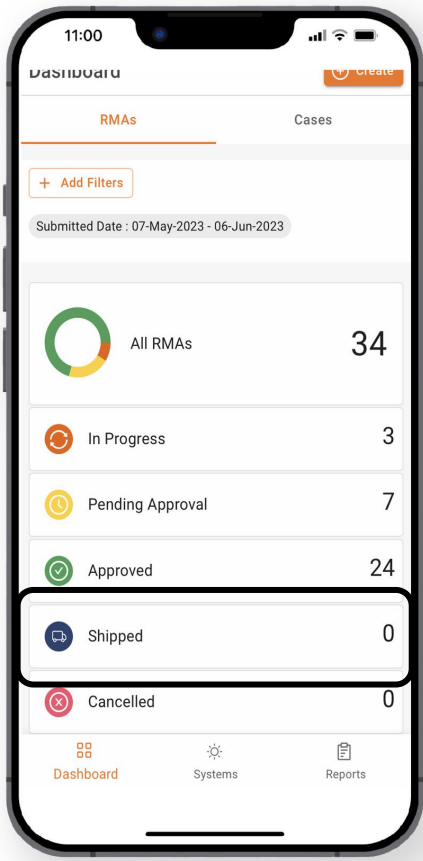
To view a list of RMAs pending approval, select **Pending Approval**.



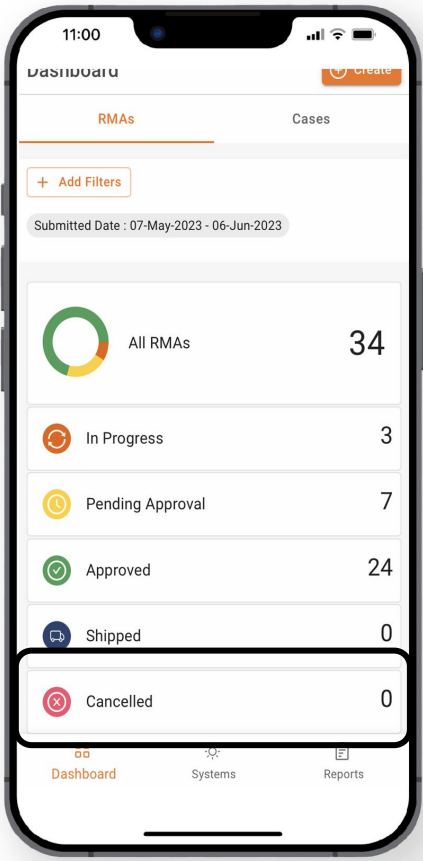
To view a list of approved RMAs, select **Approved**.

Dashboard: RMAs

Installers can view their total number of RMAs and specific RMA information in the **RMAs** tab of the **Dashboard**.



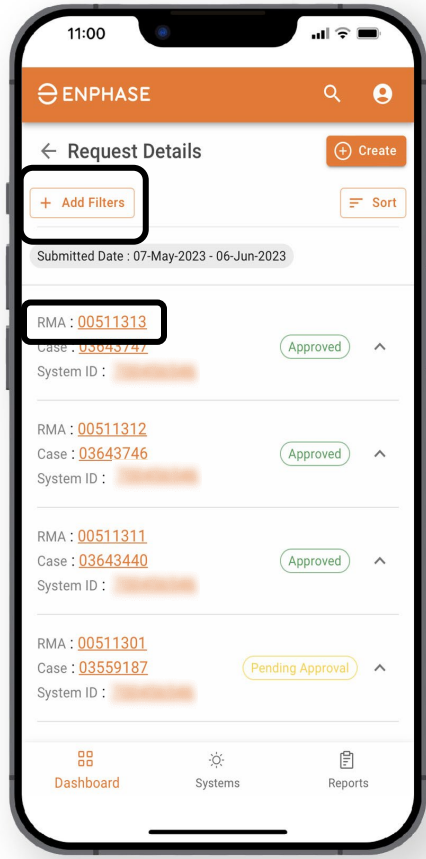
To view a list of shipped RMAs, select **Shipped**.



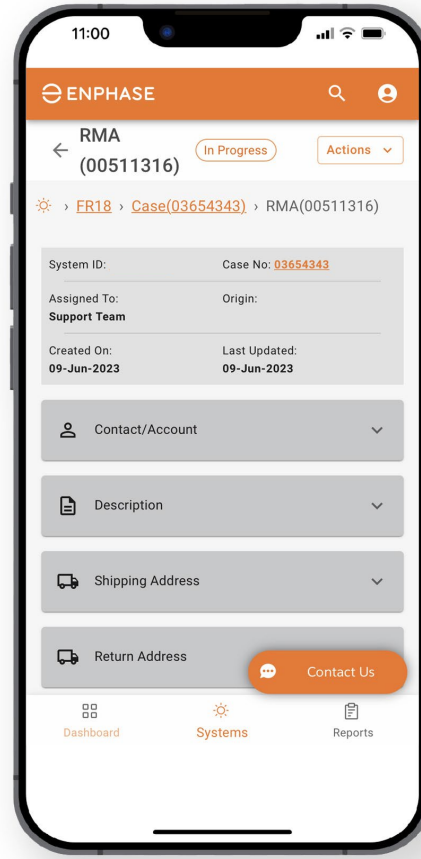
To view a list of cancelled RMAs, select **Cancelled**.

Dashboard: RMAs

Selecting any of the previously mentioned **RMAs dashboard** options will open the **Request Details** page, which displays a list of RMAs.



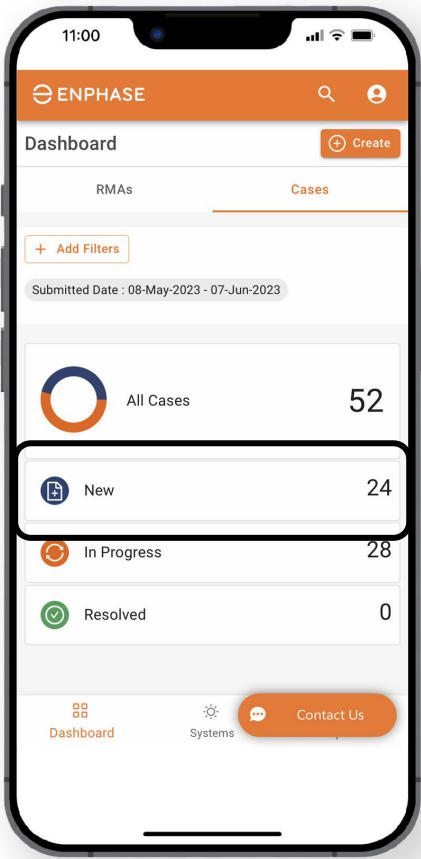
Installers can use the **Add Filters** option or select an RMA from the list to view more details.



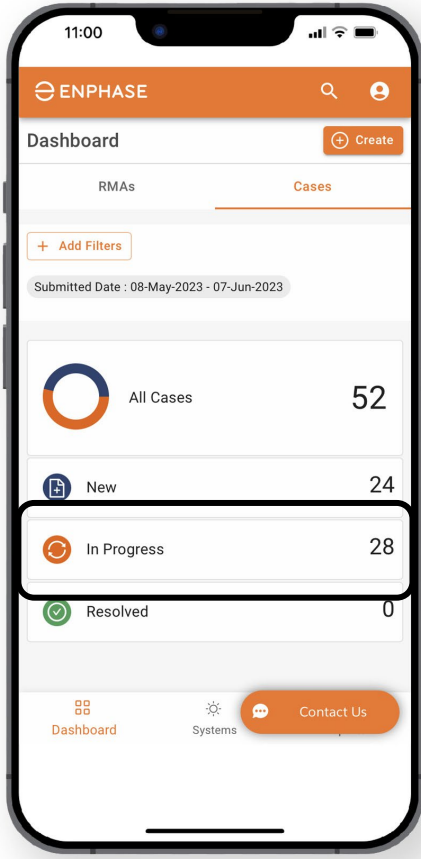
Once an RMA is selected, the **RMA** page will open.

Dashboard: Cases

Installers can view their total number of cases and specific case information in the **Cases** tab of the **Dashboard**.



To view a list of new Cases, select **New**.



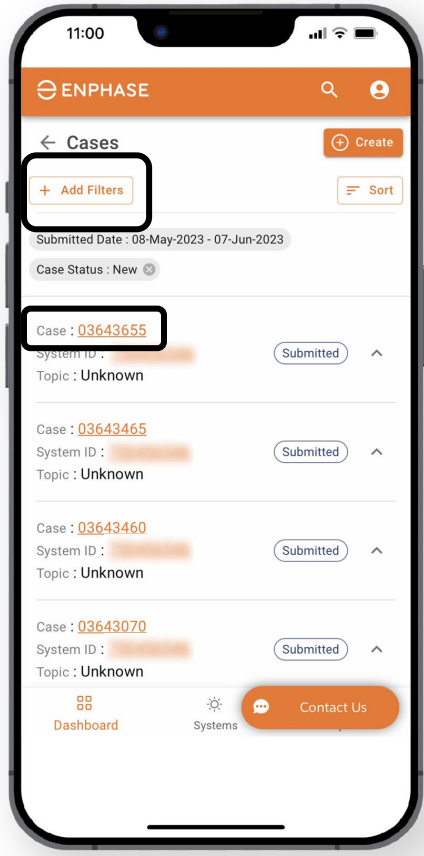
To view a list of in-progress cases, select **In-progress**.



To view a list of resolved RMAs, select **Resolved**.

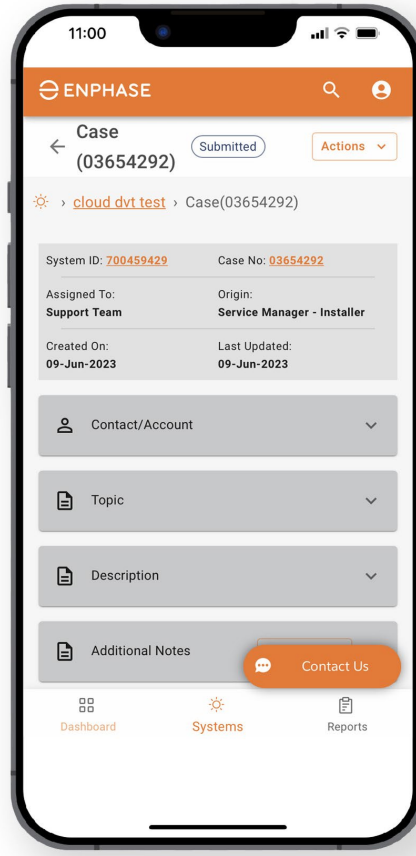
Dashboard: Cases

Selecting any of the previously mentioned **Cases Dashboard** options will open the **Cases** page, which displays a list of Cases.



Installers can use the **Add Filter** option.

Select a Case from the list to view more details.



Once a Case is selected, the **Case** page will open.

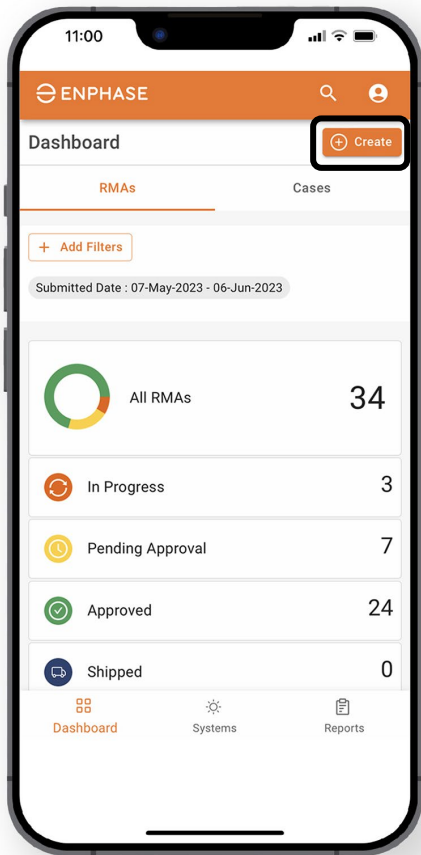
Enphase Service Manager Guide

Mobile view

Create a new RMA

Create an RMA

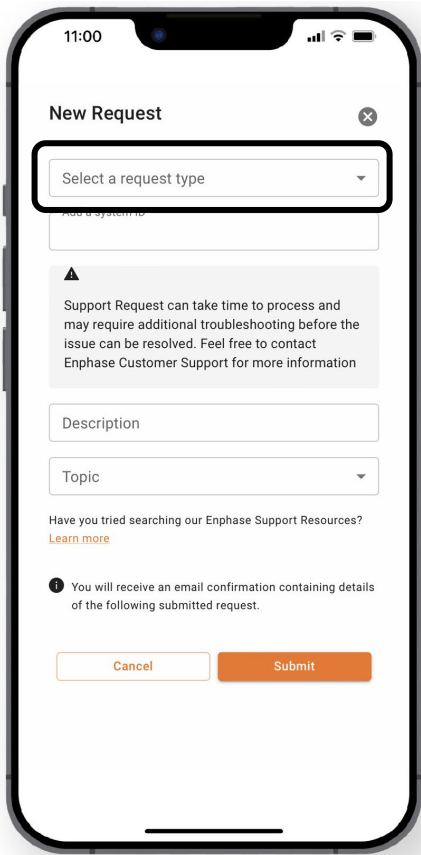
Installers can create new RMAs from both the **RMAs** tab and the **Cases** tab of the **Dashboard**.



Step 1

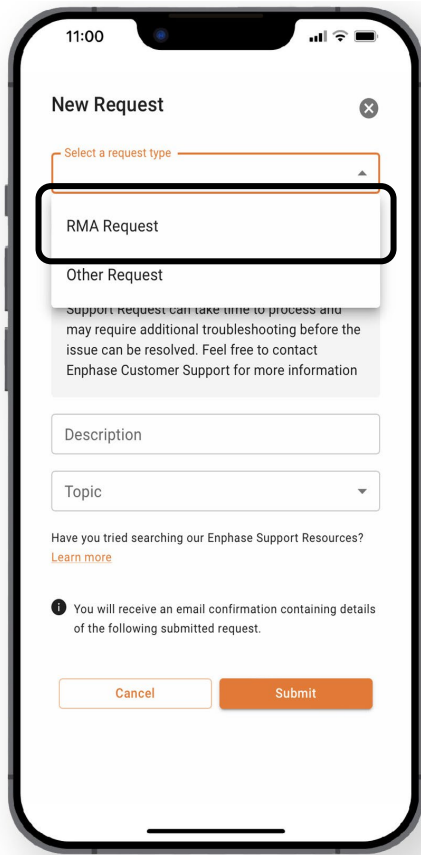
Select **Create** in the upper-right corner.

The **New Request** form will appear.



Step 2

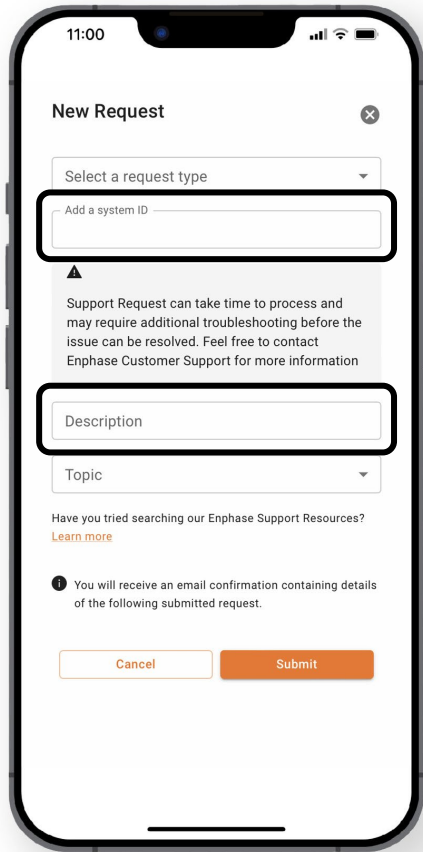
Select **RMA Request** from the **Select a request type** dropdown.



Step 3

Select **RMA Request**.

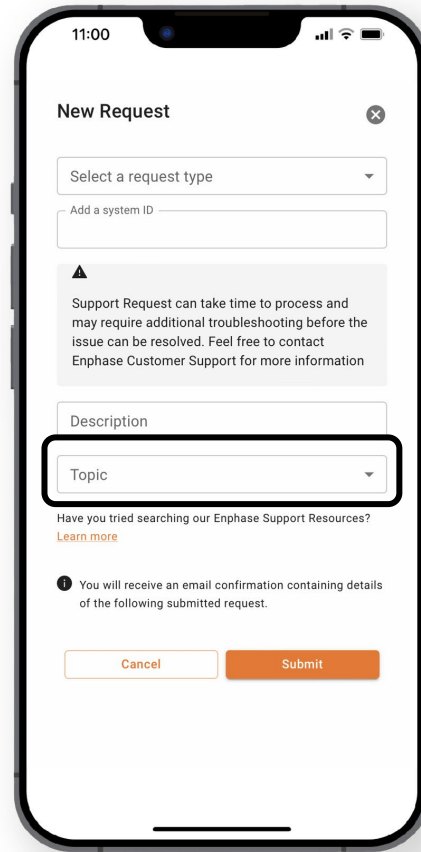
Create an RMA



The screenshot shows the 'New Request' form on a mobile device. The 'Add a system ID' text input field and the 'Description' text input field are highlighted with black rectangles. A warning message is displayed above the description field: 'Support Request can take time to process and may require additional troubleshooting before the issue can be resolved. Feel free to contact Enphase Customer Support for more information'. At the bottom, there are 'Cancel' and 'Submit' buttons.

Step 4

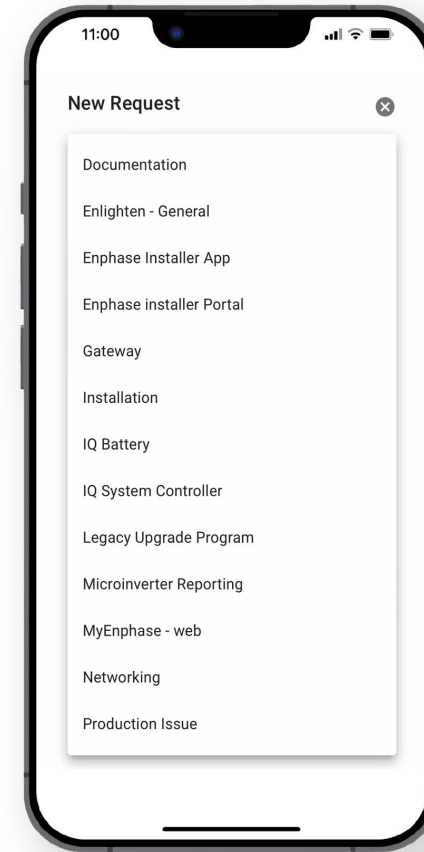
Enter the Site ID and a description of the request in the provided fields.



The screenshot shows the 'New Request' form on a mobile device. The 'Topic' dropdown menu is highlighted with a black rectangle. A warning message is displayed above the description field: 'Support Request can take time to process and may require additional troubleshooting before the issue can be resolved. Feel free to contact Enphase Customer Support for more information'. At the bottom, there are 'Cancel' and 'Submit' buttons.

Step 5

Select the **Topic** dropdown.



The screenshot shows the 'New Request' form on a mobile device. The 'Topic' dropdown menu is open, displaying a list of topics: Documentation, Enlighten - General, Enphase Installer App, Enphase installer Portal, Gateway, Installation, IQ Battery, IQ System Controller, Legacy Upgrade Program, Microinverter Reporting, MyEnphase - web, Networking, and Production Issue. At the bottom, there are 'Cancel' and 'Submit' buttons.

Step 6

Select a topic relevant to the RMA request, then select **Submit**.

A confirmation email will be automatically sent.

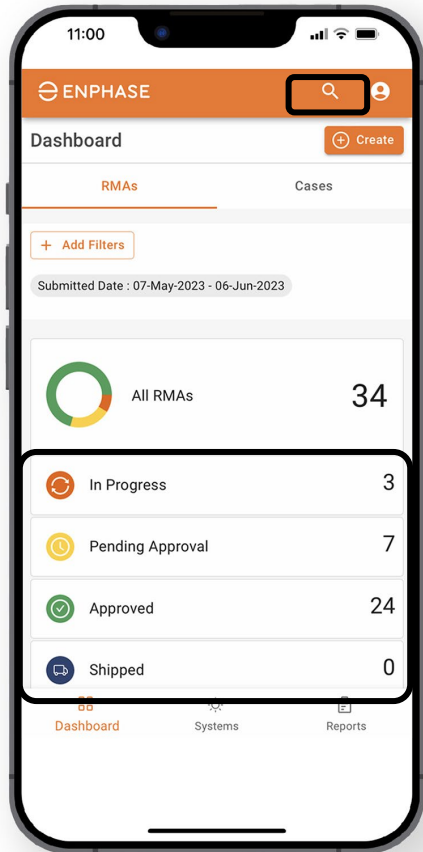
Enphase Service Manager Guide

Mobile view

Labor Reimbursements

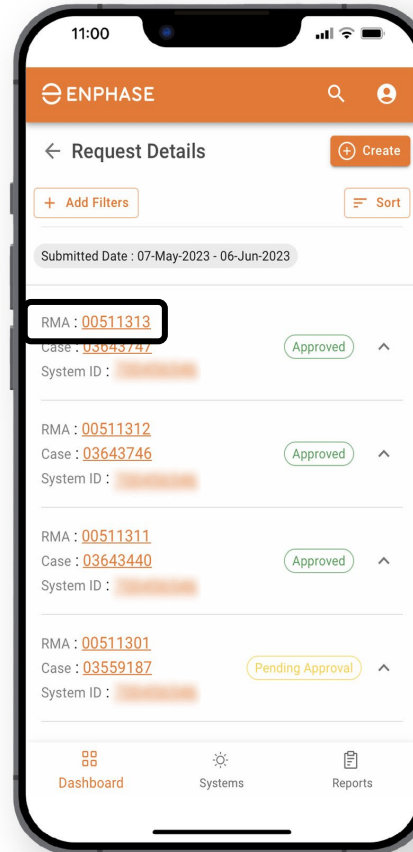
Apply for Labor Reimbursement

To apply for a Labor Reimbursement, installers can select an RMA number from the **RMAs Dashboard**.



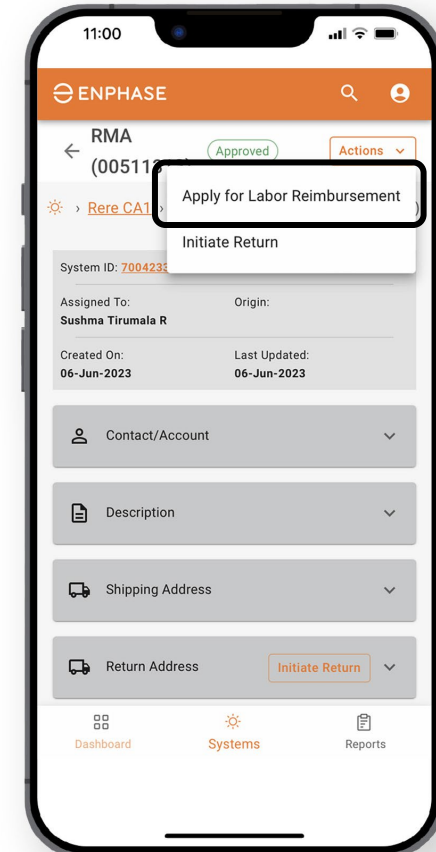
Step 1

Use the search tools or select one of the indicated options to find an RMA.



Step 2

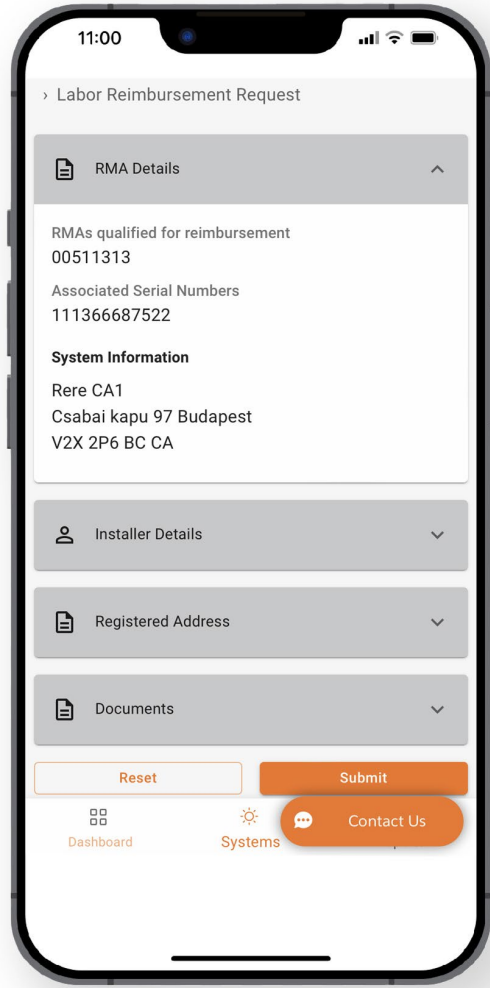
Select an RMA link.



Step 3

Select the **Actions** dropdown menu, then select **Apply for Labor Reimbursement**.

Apply for Labor Reimbursement



The screenshot shows a mobile application interface for a 'Labor Reimbursement Request'. The top status bar shows the time as 11:00. The page title is 'Labor Reimbursement Request'. Below the title, there is a section titled 'RMA Details' with a list of RMA details: 'RMAs qualified for reimbursement 00511313', 'Associated Serial Numbers 111366687522', and 'System Information' which includes 'Rere CA1', 'Csabai kapu 97 Budapest', and 'V2X 2P6 BC CA'. Below this, there are three expandable sections: 'Installer Details', 'Registered Address', and 'Documents'. At the bottom of the form, there are two buttons: 'Reset' and 'Submit'. Below these buttons, there is a navigation bar with three icons: 'Dashboard', 'Systems', and 'Contact Us'.

Step 4

The **Labor Reimbursement Request** form will appear, displaying the RMA Details.

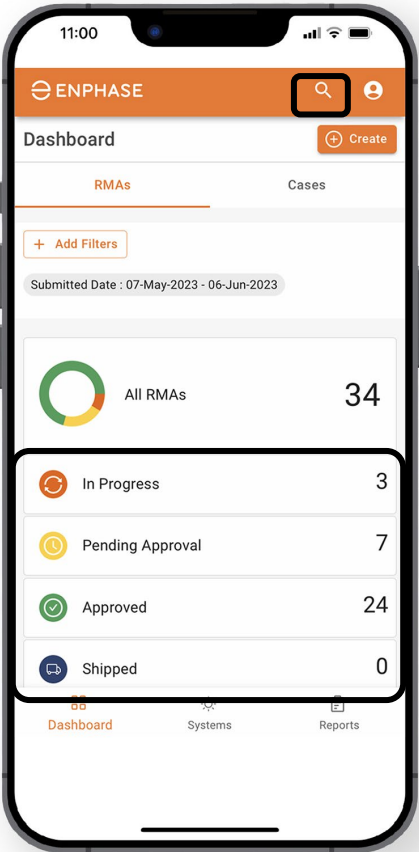
Select each dropdown and complete/validate the required fields:

- **Installer Details**
- **Registered Address**
- **Documents**

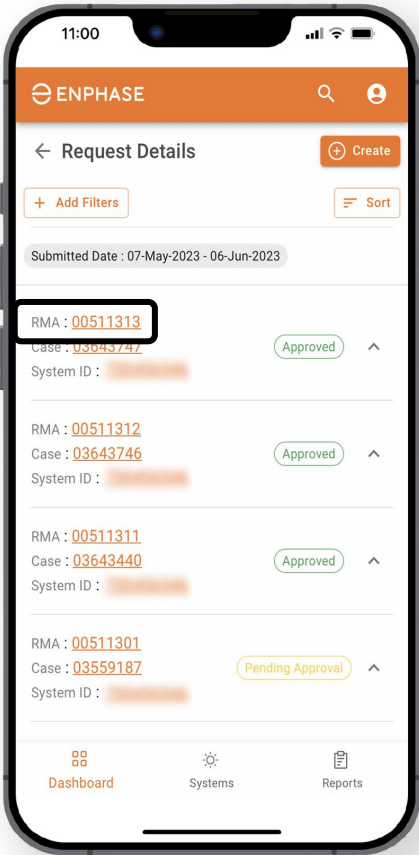
When finished, select **Submit**.

Track Labor Reimbursement application

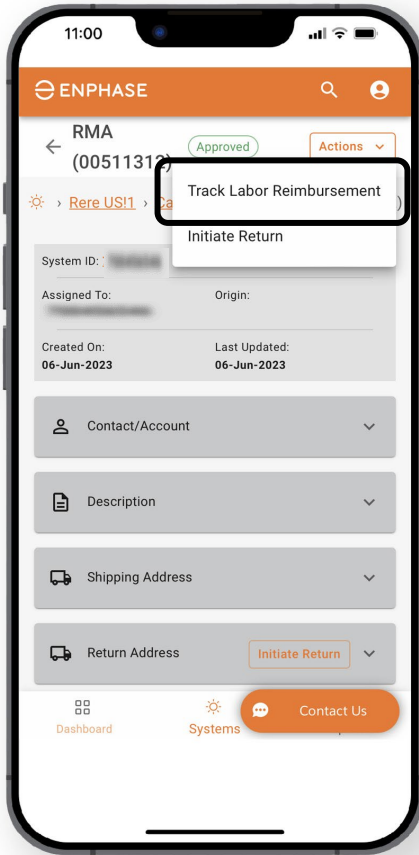
To track a Labor Reimbursement, installers can select an RMA number from the **RMAs Dashboard**.



Step 1
Use the search tools or select one of the indicated options to find an RMA.

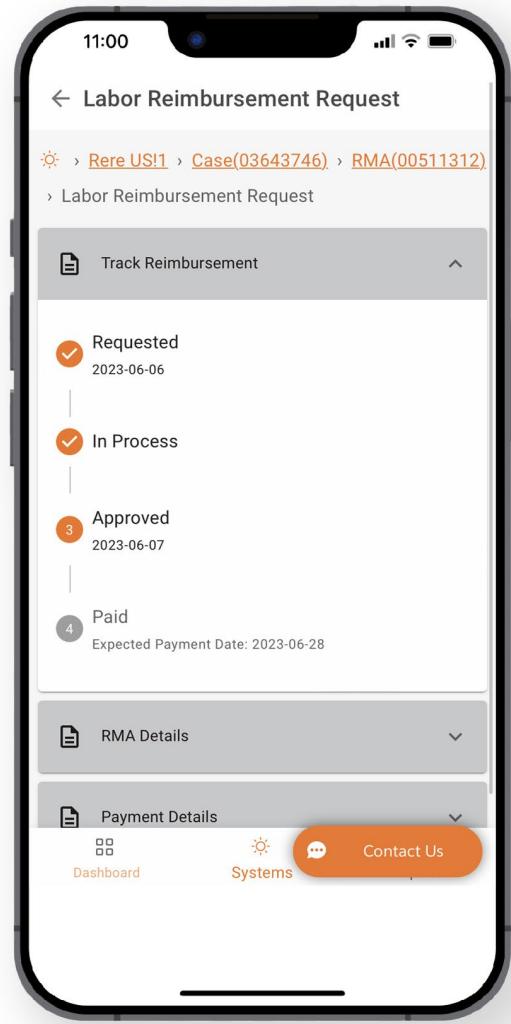


Step 2
Select an RMA link.



Step 3
Select the **Actions** dropdown menu.
If the Labor Reimbursement request was submitted, the list will display a **Track Labor Reimbursement** option. Select it.

Track Labor Reimbursement application



Step 4

The **Labor Reimbursement Request** page will appear, displaying tracking information in the **Track Reimbursement** Section.

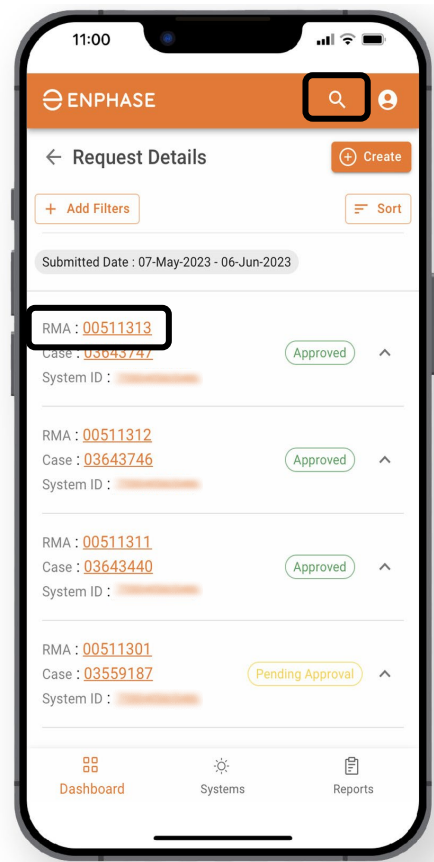
Enphase Service Manager Guide

Mobile view

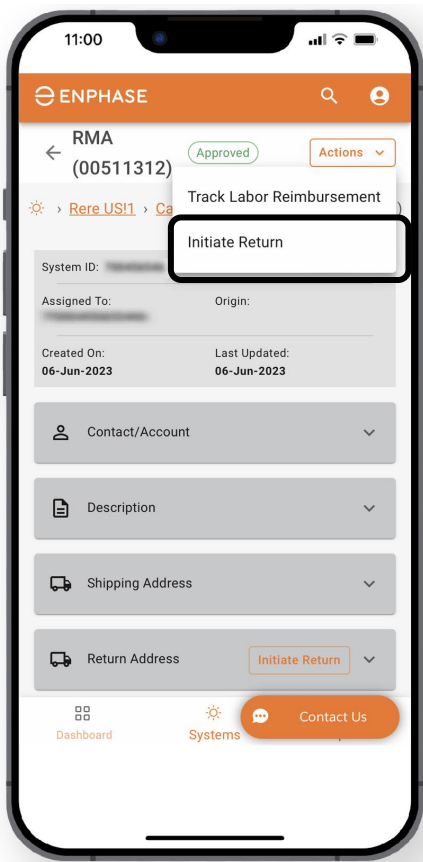
Initiate Returns

Initiate Returns

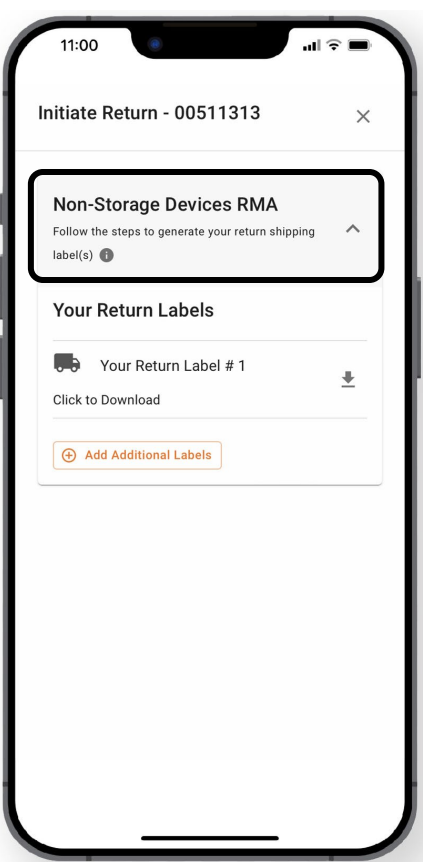
To initiate a return, installers can use the **Search** tool, **Add Filters** option, or select one of the other Dashboard items to find an RMA.



Step 1
Select an RMA link.



Step 2
Select the Actions dropdown menu, then select **Initiate Return**.



Step 3
Follow the instructions provided on the **Initiate Return** pop-up.

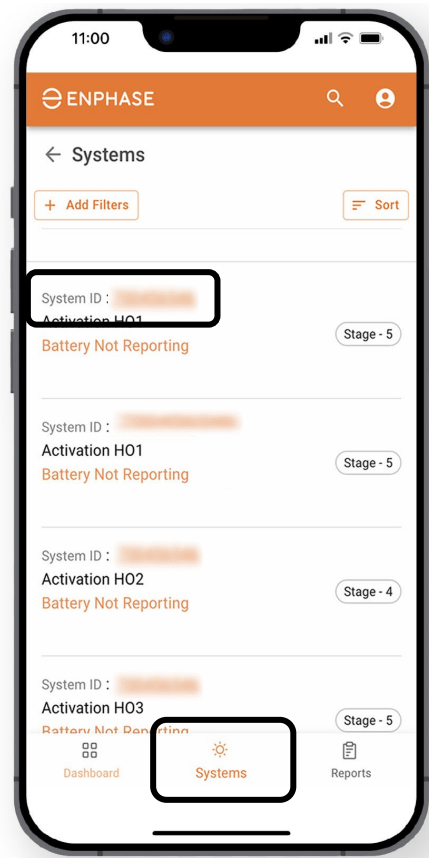
Enphase Service Manager Guide

Mobile view

Systems

Systems

Installers can view all their systems and status of each in the **Systems** tab.

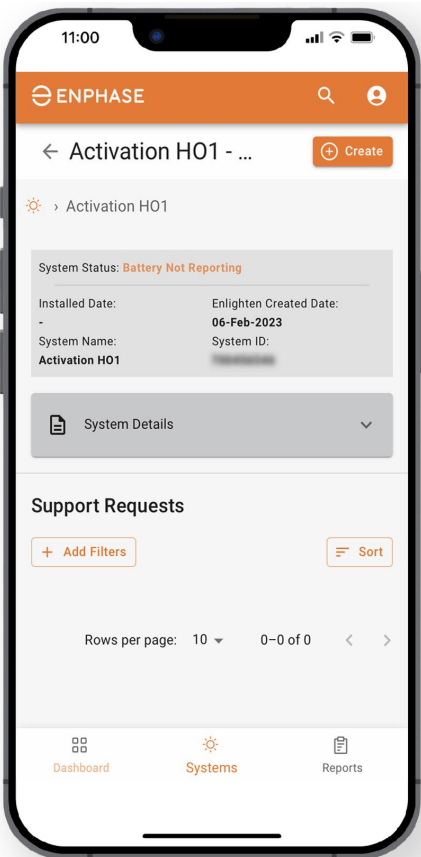


Step 1

Select the **Systems** tab in the lower task bar.

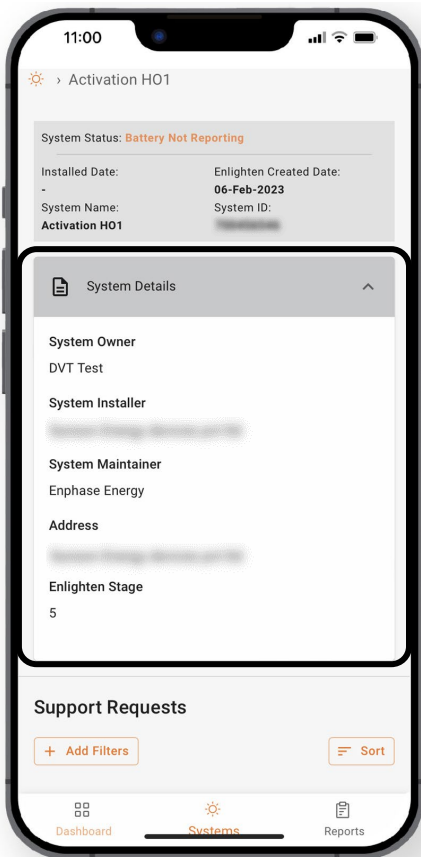
The **Systems** page will appear, displaying a list of the installer’s current systems.

Select a hyperlinked **System ID** to view more site details.



Step 2

The site’s **Activation** page will appear, including all Support Requests.



Installers can also view System Details in the **System Details** dropdown.

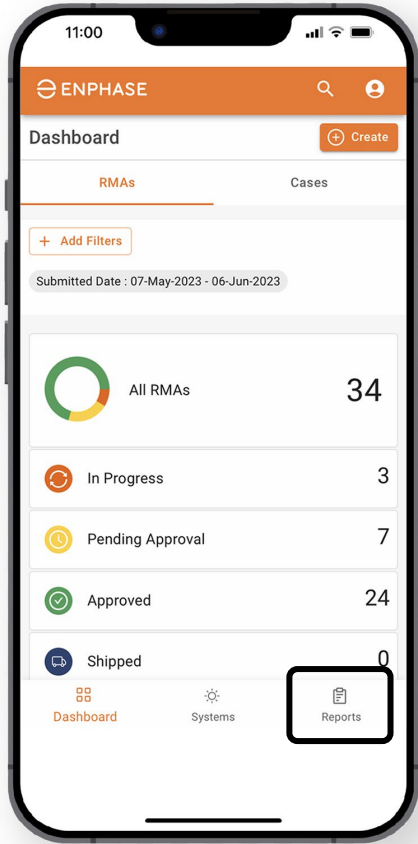
Enphase Service Manager Guide

Mobile view

Reports

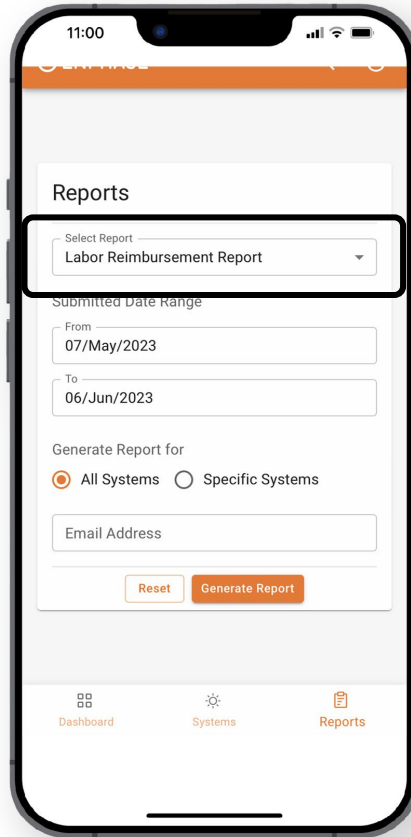
Reports

Installers can generate and email homeowners their reports in the **Reports** tab.



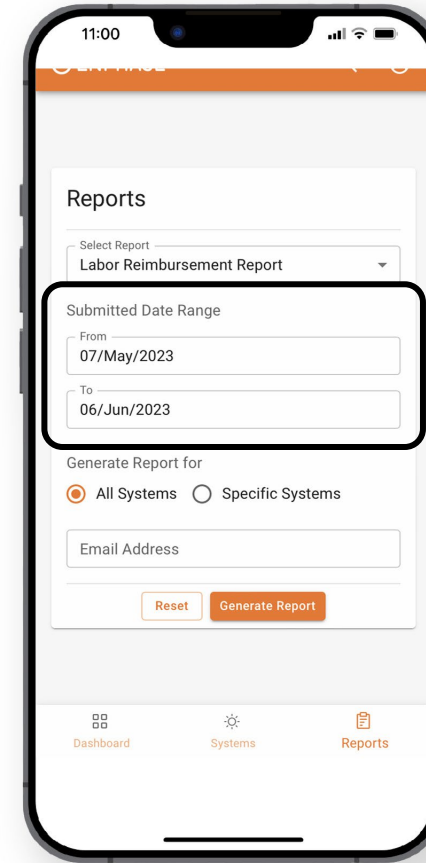
Step 1

Select the **Reports** tab in the lower task bar.



Step 2

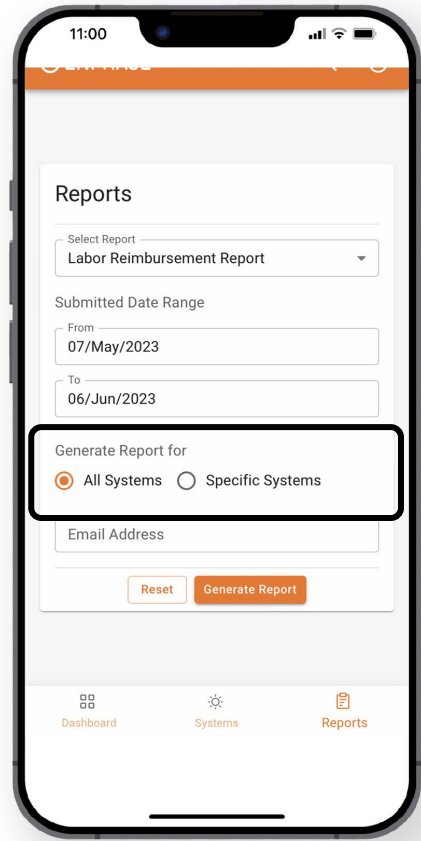
Select the desired report type from the **Report Type** dropdown.



Step 3

Select a date range for the report in the provided fields in the **From** and **To** fields of the **Submitted Date Range** section.

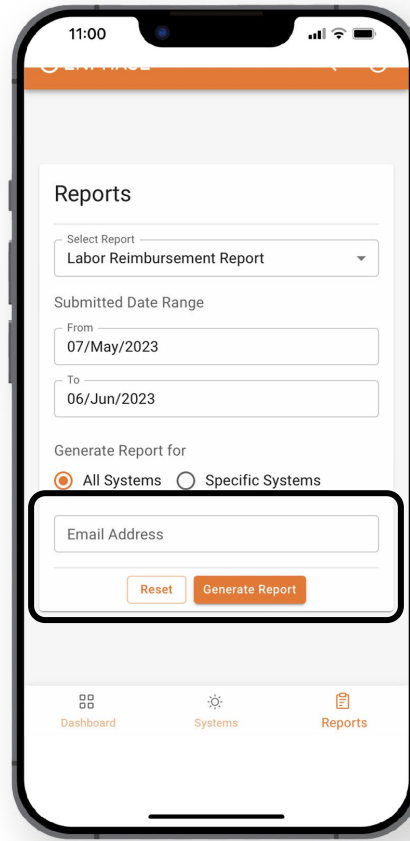
Reports



Step 4

To generate a report for all sites, **select All Sites.**

To generate a report for specific sites, select **Specific Sites**, then enter each Site ID in the provided field and select **Add.**



Step 5

Enter the email address to which the report should send, then select **Generate Report.**

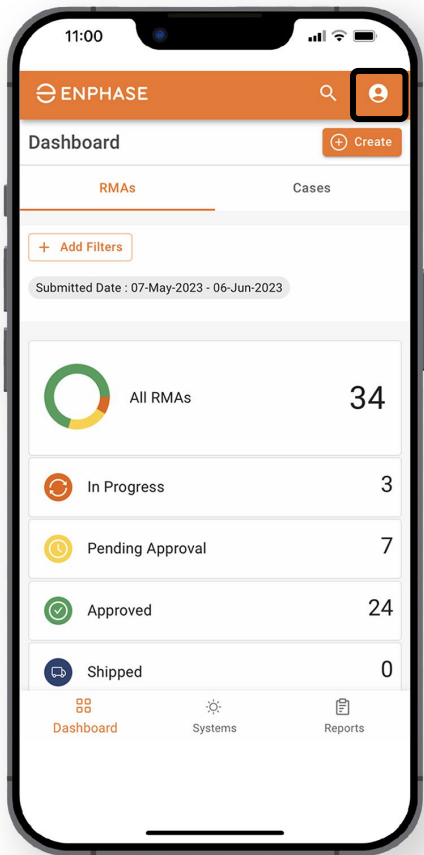
Enphase Service Manager Guide

Mobile view

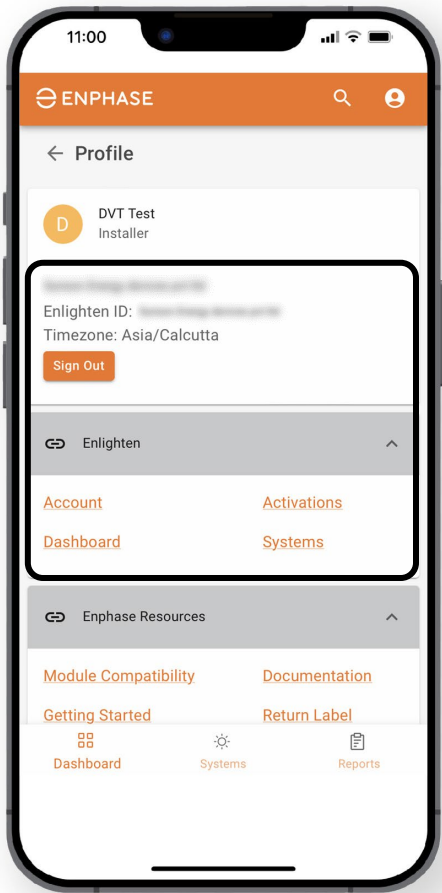
Profile

Profile

Installers can view their personal account information, access the Enphase Installer Portal, and find additional resources in the **Profile** page.

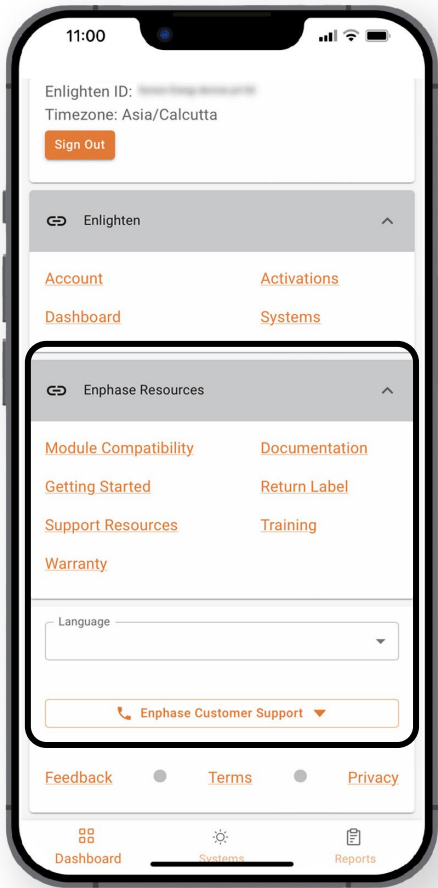


The **Profile** page can be accessed by selecting the icon in the upper-right corner.



The top of the page will display the installer's email address, Enlighten ID, Timezone, and the option to Sign Out.

The hyperlinks in the **Enlighten** dropdown provide access to Enphase Installer Portal links.



The hyperlinks in the **Enphase Resources** dropdown provide access to training, documentation, and other support.

Installers can change the Language settings or Contact Customer Support at the bottom of the page.

Enphase Service Manager Mobile View: Learning check

- Explain how to view RMAs and Cases in the Dashboard.
- Explain how to use the Search tool.
- Explain how to create a new RMA.
- Explain how to apply for and track Labor Reimbursements.
- Explain how to Initiate Returns.
- Explain how to access system information.
- Explain how to run reports.
- Explain how to view the Profile.

Enphase Service Manager Guide

Desktop view

Enphase Service Manager Desktop View:

Learning objectives

- Understand how to view RMA and case information in the Dashboard.
- Understand how to use the Search tool.
- Understand how to create a new RMA.
- Understand how to apply for and track Labor Reimbursement requests.
- Understand how to Initiate returns.
- Understand how to access system information.
- Understand how to run reports.
- Understand how to view the Profile.

Enphase Service Manager Guide

Desktop view

Dashboard

Dashboard: Overview

The **Dashboard** displays all Recent Support Requests and provides installers access to create, view, and manage their Cases.

To view RMA information on the Dashboard, select the **RMAs** tab. To view case information on the Dashboard, select the **Cases** tab.

Dashboard

Systems

Reports

Enlighten

Enphase Resources

Dashboard

Create

RMAs

Cases

Add Filters

Submitted Date : 08-May-2023 - 07-Jun-2023

All RMAs

34

In Progress

3

Pending Approval

7

Approved

24

Shipped

0

Cancelled

0

Request Details

Columns

Density

RMA Number	Case Number	System ID	System Name	Zipcode	RMA Submitted Date
00511313	03643747		Rere CA1	V2X 2P6	06 Jun 2023
00511312	03643746		Rere US1	92672	06 Jun 2023
00511311	03643440		LReUSMSeries-PlsDoNotModify1	K1A0A0	05 Jun 2023
00511301	03559187		ENS 1.5 iOS JAN 24	51711	01 Jun 2023

Language

English

Enphase Customer Support

Feedback | Terms | Privacy | Enph

Contact Us

Installers can start a live chat with Enphase Customer Support by selecting the **Contact Us** option.

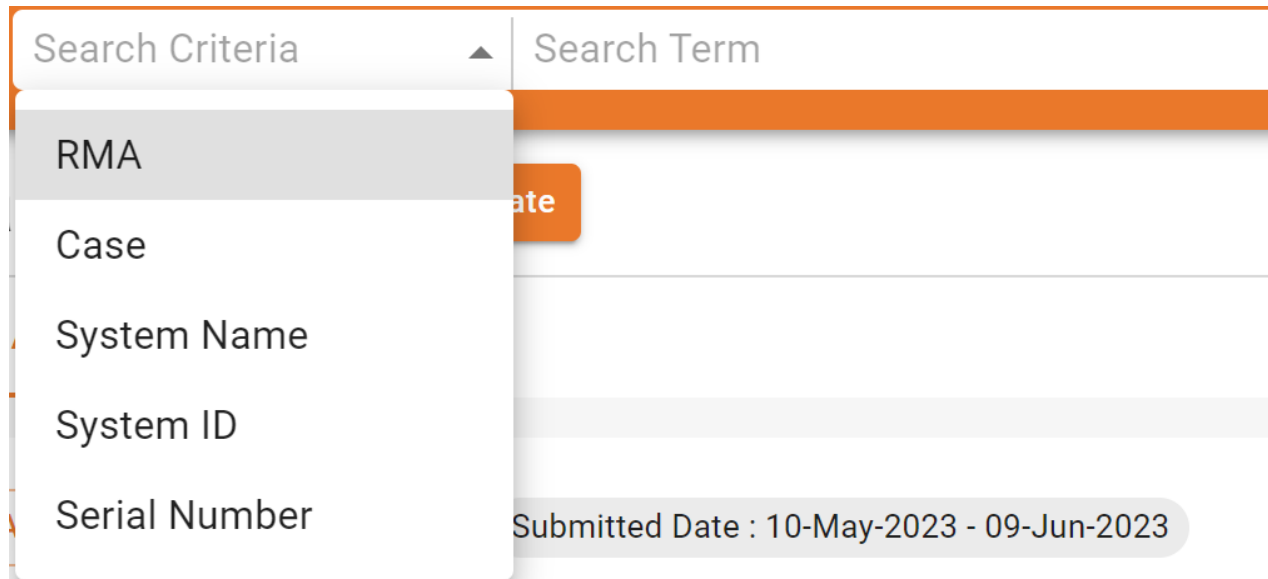
Dashboard: Search tool

Installers can use the **Search** tool located in the top taskbar to find a specific Case or RMA.



The image shows a search bar with an orange background. On the left, there is a dropdown menu labeled "Search Criteria" with a downward arrow. To its right is a text input field labeled "Search Term".

Select a criteria option from the **Search Criteria** dropdown and enter a Search Term in the provided field to search.



The image shows the search bar with the "Search Criteria" dropdown menu open. The dropdown list contains the following options: "RMA", "Case", "System Name", "System ID", and "Serial Number". The "RMA" option is currently selected and highlighted. The "Search Term" field is empty. Below the search bar, there is a button labeled "Search" and a date range filter set to "Submitted Date : 10-May-2023 - 09-Jun-2023".

Dashboard: Add Filters

Installers can also select the **Add Filters** option in the **RMAs Dashboard** and **Cases Dashboard** to find a specific case or RMA.



Installers can select filters and enter information in the provided field. The search will initiate once **Apply** is selected.

RMA filters

Reset Apply

RMA Number

Enter RMA Number

Case Number

System ID

System Name

System zipcode

Submitted Date •

System City

System State

Modified Date

Case filters

Reset Apply

Case Number

Enter Case Number

System ID

System Name

System zipcode

Submitted Date •

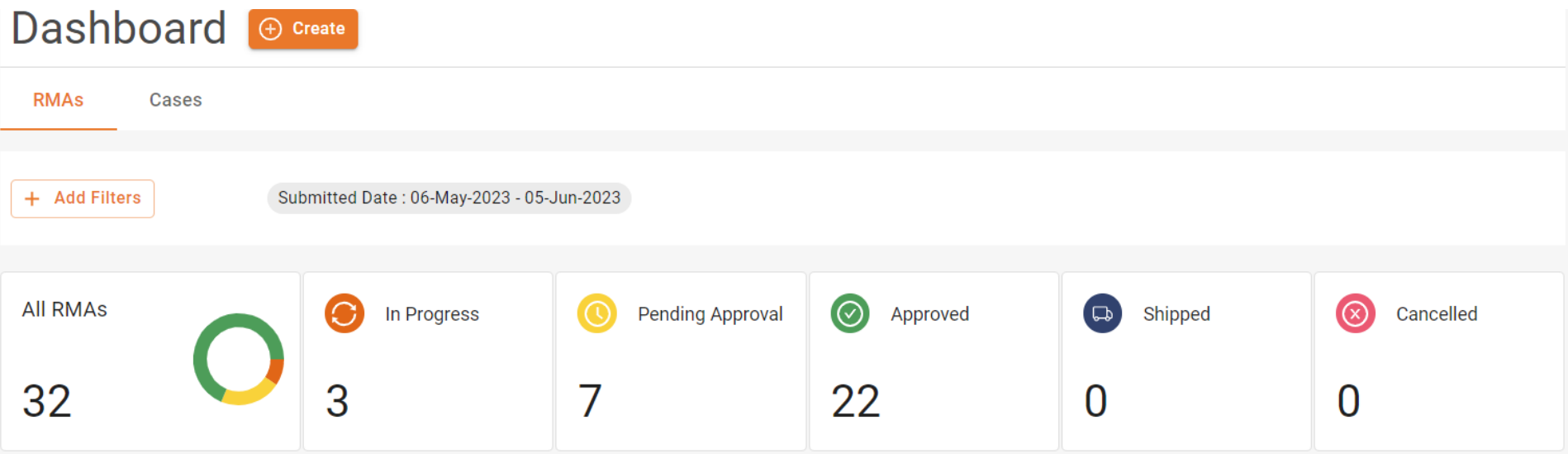
System City

System State

Modified Date

Dashboard: RMAs

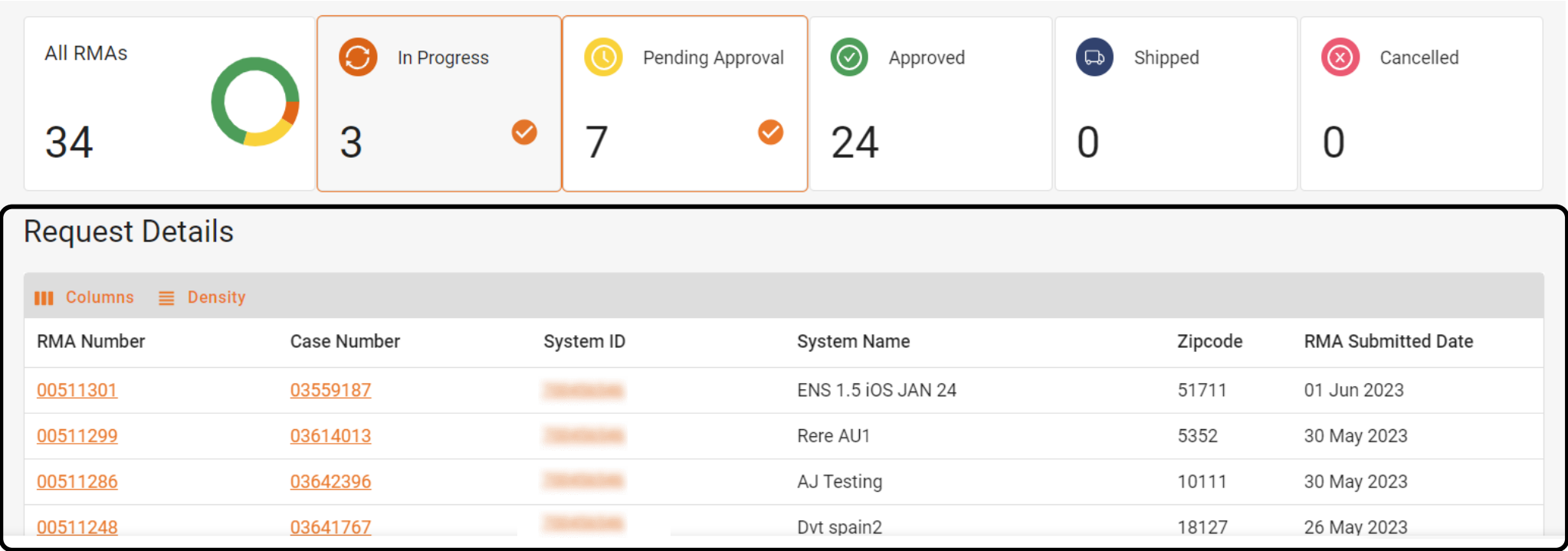
Installers can view 30 days of RMAs and specific RMA information in the **RMAs** tab of the **Dashboard**.



- To view a list of in-progress RMAs, select **In-progress.**
- To view a list of RMAs pending approval, select **Pending Approval.**
- To view a list of approved RMAs, select **Approved.**
- To view a list of shipped RMAs, select **Shipped.**
- To view a list of cancelled RMAs, select **Cancelled.**

Dashboard: RMAs

Selecting one or more of the previously mentioned **RMAs Dashboard** options will open a page like below, displaying a list of relevant RMAs in the **Request Details** section.



Installers can select an RMA Number to view more details.

Dashboard: RMAs

Selecting an RMA number will open the **RMA** page, containing all details about the requested RMA.

← RMA(00511316)

In Progress

Actions

☀

> [FR18](#)

> [Case\(03654343\)](#)

> RMA(00511316)

System ID:

Case No: [03654343](#)

Assigned To: **Support Team**

Origin:

Created On: **09-Jun-2023**

Last Updated: **09-Jun-2023**

👤

Contact/Account

Account Name

Contact

Account Owner

DVT Test

📄

Description

Multiple IQ EVSE, M215, IQ Battery

🚚

Shipping Address

California 1, Long Beach, CA 12345 US

🚚

Return Address

90810 US

📄

Additional Notes

+ Add Note

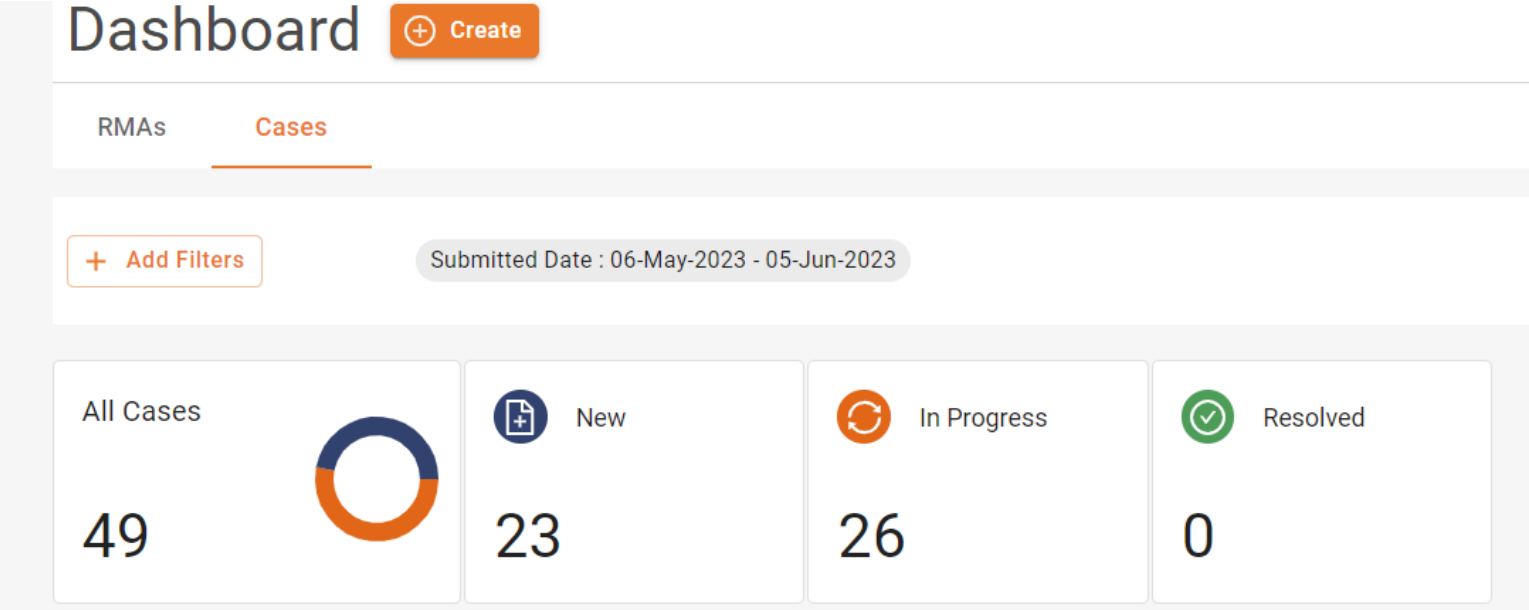
Warranty Claim Lines

🗨

Contact Us

Dashboard: Cases

Installers can view their total number of cases and specific case information in the **Cases** tab of the **Dashboard**.



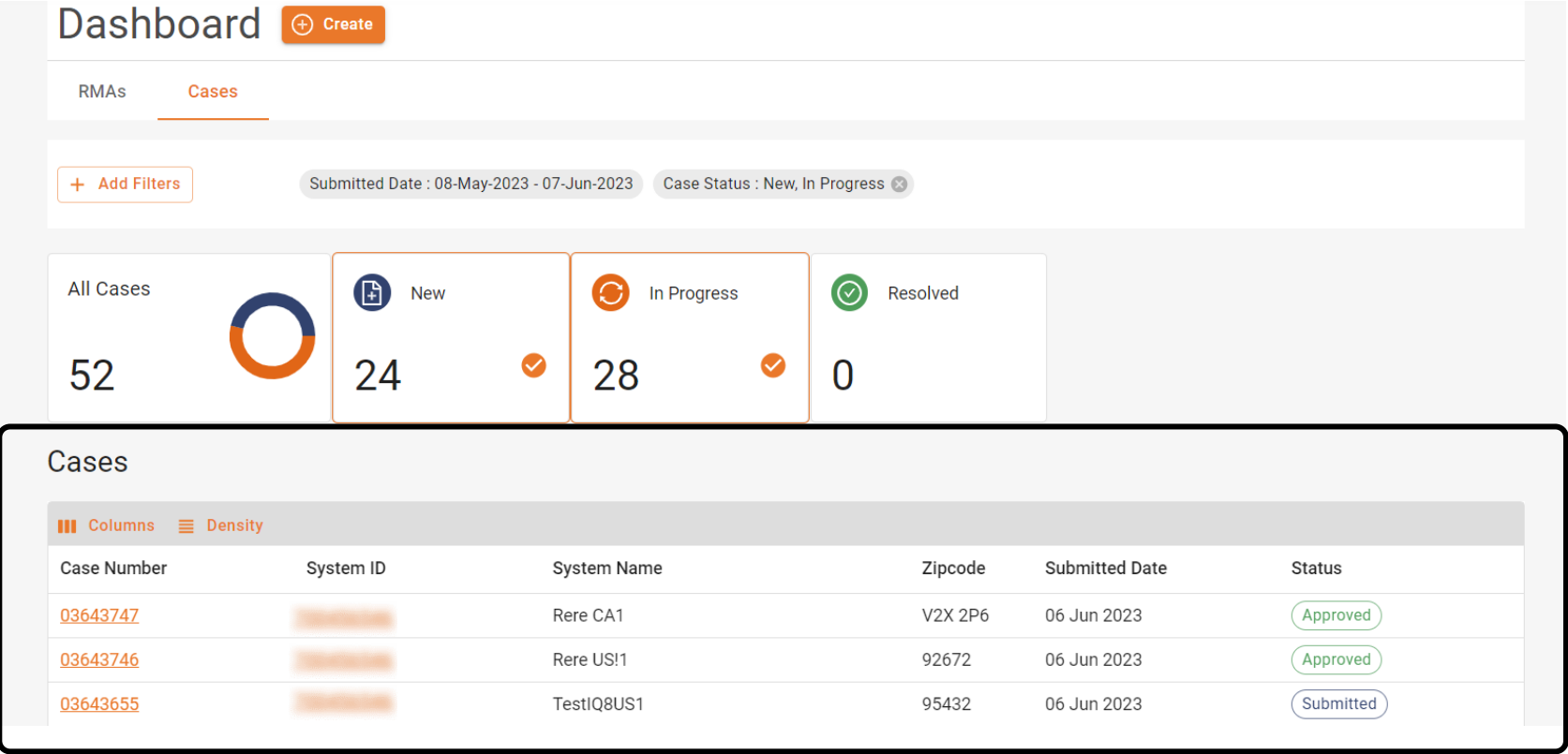
To view a list of new cases, select **New**.

To view a list of in-progress cases, select **In-progress**.

To view a list of resolved RMAs, select **Resolved**.

Dashboard: Cases

Selecting one or more of the previously mentioned **Cases Dashboard** options will open a page like below, displaying a list of Cases in the **Cases** section.



Installers can select an RMA Number to view more details.

Dashboard: Cases

Selecting a Case number will open the **Case** page, containing all details about the requested Case.

← Case(03654343)

In Progress

Actions ▾

⚙️ > [FR18](#) > Case(03654343)

System ID:

Case No: [03654343](#)

Assigned To: **Support Team**

Origin: **Service Manager - CS**

Created On: **09-Jun-2023**

Last Updated: **09-Jun-2023**

👤 Contact/Account

Account Name

Contact

Account Owner

DVT Test

📄 Topic

IQ System Controller

📄 Description

Multiple IQ EVSE, M215, IQ Battery


📄 Additional Notes

+ Add Note

List of RMA

+ Add Filters

Contact Us

 ENPHASE

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45

Dashboard: Additional features

1 Enlighten

2 Enphase Resources

All Cases

49

New 23

Cases

Columns

Density

Case Number	System ID
03643465	
03643460	
03643440	
03643070	

3

Language

Enphase Customer Support

- 1. The hyperlinks in the **Enlighten** dropdown provide access to the Enphase Installer Portal
- 2. The hyperlinks in the **Enphase Resources** dropdown provide access to training and documentation support.
- 3. Installers can change the language settings or contact Enphase Customer Support at the bottom of the page.

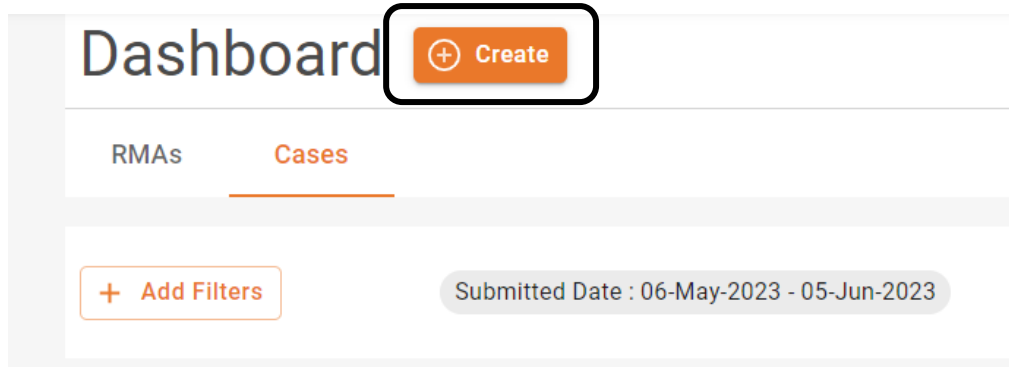
Enphase Service Manager Guide

Desktop view

Create a new RMA

Create an RMA

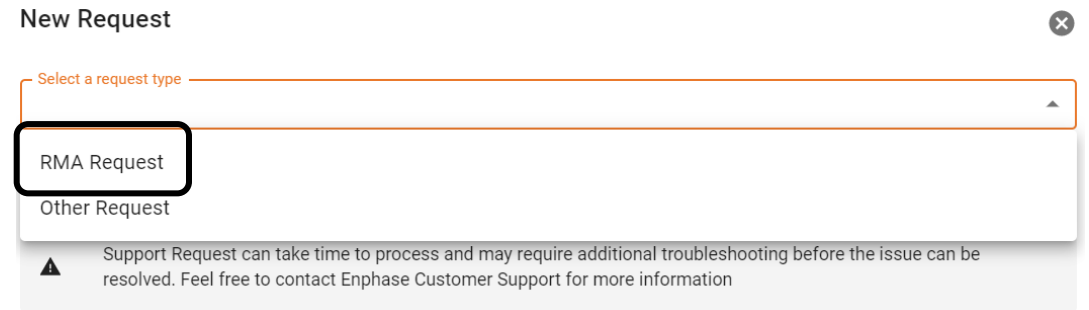
Installers can create new RMAs from both the **RMAs** tab and the **Cases** tab of the **Dashboard**.



Step 1

Select **Create**, next to **Dashboard**.

The **New Request** form will appear.



Step 2


Select **RMA Request** from the **Request Type** dropdown.

Create an RMA

Step 3

Enter the Site ID and a description of the request in the provided fields.

Add a system ID

 Support Request can take time to process and may require additional troubleshooting before the issue can be resolved. Feel free to contact Enphase Customer Support for more information

Description

Step 4

Select the relevant topic from the **Topic** dropdown, then select **Submit**.

Topic

Have you tried searching our Enphase Support Resources? [Learn more](#)

Enphase Service Manager Guide

Desktop view

Labor Reimbursements

Apply for Labor Reimbursement

To apply for a Labor Reimbursement, installers can select an RMA number from the **RMAs Dashboard**.

Request Details

Columns Density					
RMA Number	Case Number	System ID	System Name	Zipcode	RMA Submitted Date
00511313	03643747		Rere CA1	V2X 2P6	06 Jun 2023
00511312	03643746		Rere US!1	92672	06 Jun 2023

Select the **Actions** dropdown menu, then select **Apply for Labor Reimbursement**.

← RMA(00511313)

Approved

Actions ▾

☀ > Rere CA1 > Case(03643747) > RMA(00511313)

Apply for Labor Reimbursement

Initiate Return

Labor Reimbursements

The Labor Reimbursement Request form will appear, displaying the RMA Details.

RMA Details

RMA qualified for reimbursement
00511313

Associated Serial Numbers

System Information

Installer Details

Installer Company

Contact Name *
Test ENLM

Email *

Phone *

Registered Address

Street Address *
New street

City *

Zip/Postal Code *
92672

Street Address 2

State/Province *
California

Country *
US

☐ Do you want to change your registered Address?

Complete all required fields:

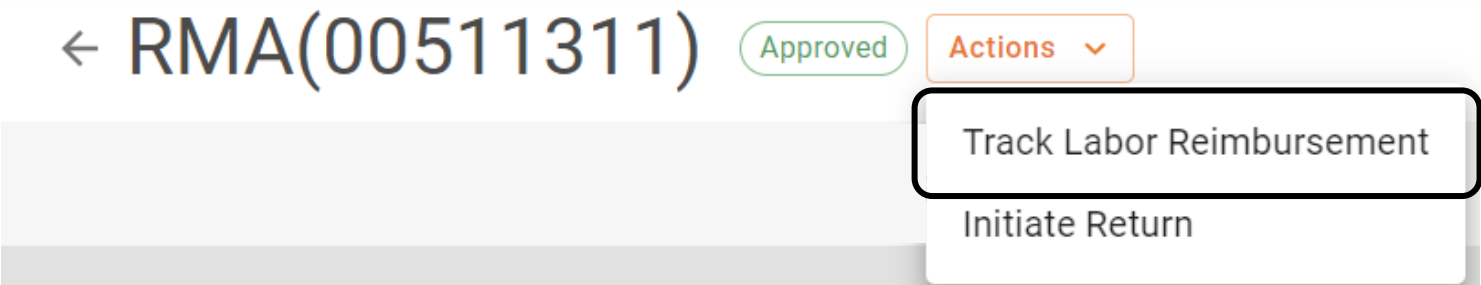
- **Installer Details**
- **Registered Address**
- **Documents**

When finished, select **Submit**.

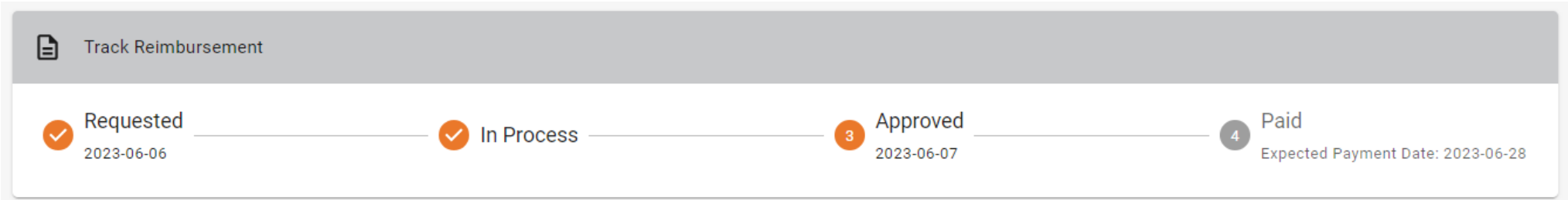
Track Labor Reimbursement application

To track a Labor Reimbursement, installers can select an RMA number from the **RMAs Dashboard**.

Select the **Actions** dropdown menu. If the Labor Reimbursement request was submitted, the list will display a **Track Labor Reimbursement** option. Select it.



The **Labor Reimbursement Request** page will appear, displaying tracking information in the **Track Reimbursement** Section.



Enphase Service Manager Guide

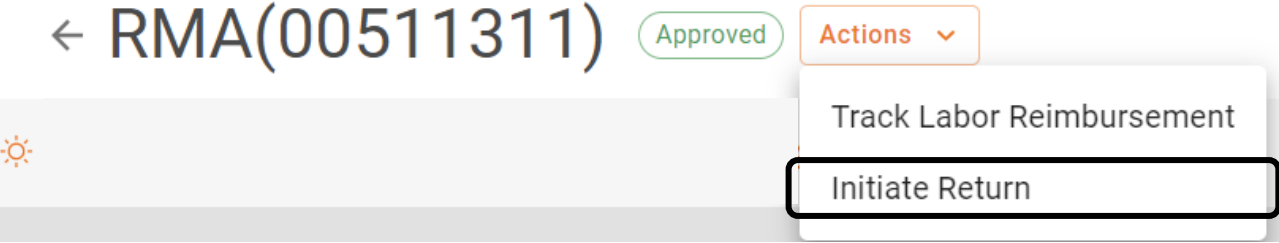
Desktop view

Initiate Return

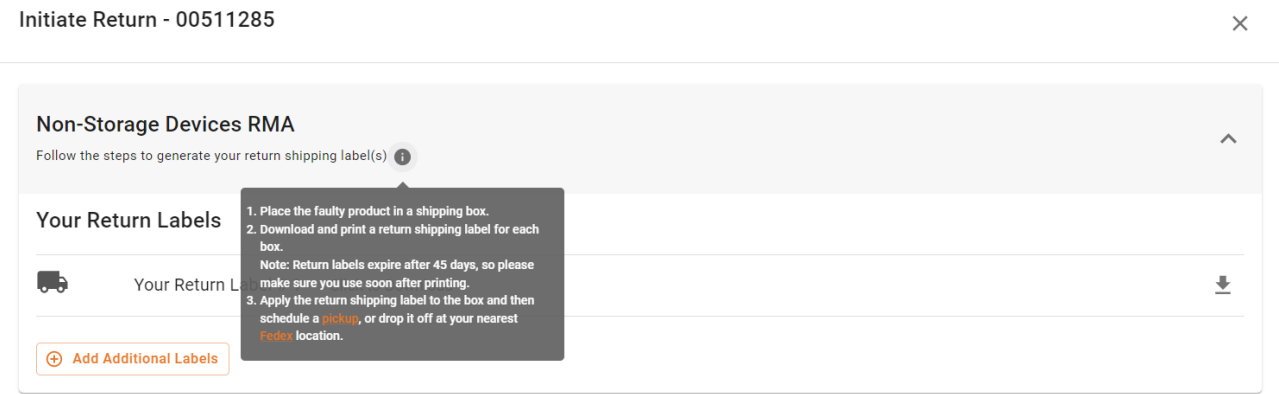
Initiate Return

To initiate a return, installers can use the **Search** tool, **Add Filters** option, or select one of the other **Dashboard** items to find an RMA.

Once an RMA page is open, select the **Actions** dropdown menu, then select **Initiate Return**.



Installers can then follow the instructions on the **Initiate Return** pop-up.



Enphase Service Manager Guide

Desktop view

Systems

Systems

Installers can view all their systems and status of each by selecting the **Systems** tab in the left taskbar.

Dashboard

Systems

Reports

Enlighten

Enphase Resources

Systems

+ Add Filters

Systems

Columns Density

System ID	System Name	Stage	System Status	Location
	Activation HO1	5	Battery Not Reporting	
	Activation HO1	5	Battery Not Reporting	
	Activation HO2	4	Battery Not Reporting	
	Activation HO3	5	Battery Not Reporting	

The **Systems** page will appear, displaying a list of the installer’s current systems.

Installers can select a site from the **System ID** list to open the site’s **Activation** page and view more details.

Systems

Once a System ID is selected, the **Activation** page will appear, displaying the system's information.

Installers can view all information about the selected system, including System Details and Support Requests.

← Activation HomeOwner1

Create

Activation HomeOwner1

System Status: **Battery Not Reporting**

System Name: **Activation HomeOwner1**

Installed Date: -

Enlighten Created Date: **07-Jul-2022**

System ID: **700457343**

System Details

System Owner	System Installer	System Maintainer	Address	Enlighten Stage
test dvt	Enphase Energy	Suneson Energy devices Pvt Ltd	Heubanken 72 Thuberan 7690 DE	5

Support Requests

Add Filters

ColumnsDensity

Case Number	Topic	Created Date	Status	Modified Date
-------------	-------	--------------	--------	---------------

Enphase Service Manager Guide

Desktop view

Reports

Reports

Installers can generate and send reports in the **Reports** tab.

The screenshot shows the Enphase user interface. On the left, a vertical task bar contains icons and labels for 'Dashboard', 'Systems', 'Reports', 'Enlighten', and 'Enphase Resources'. The 'Reports' item is highlighted with a black rectangular border. The main area of the interface displays a 'Reports' form. At the top of the form is a dropdown menu labeled 'Select Report' with 'Labor Reimbursement Report' selected. Below this is a 'Submitted Date Range' section with 'From' and 'To' date pickers showing '06/May/2023' and '05/Jun/2023' respectively. Further down is a 'Generate Report for' section with two radio buttons: 'All Sites' (which is selected) and 'Specific Sites'. Below the radio buttons is an 'Email Address' input field. At the bottom right of the form are two buttons: 'Reset' and 'Generate Report'.

Step 1

Select the **Reports** tab in the left-hand task bar.

The **Reports** page will be displayed.

Reports

Step 2

Select the desired report type from the **Report Type** dropdown.

Select Report

Labor Reimbursement Report

Step 3

Select a date range for the report in the provided fields.

Submitted Date Range

From

06/May/2023

To

05/Jun/2023

Reports

Step 4

To generate a report for all sites, select **All Sites**.

To generate a report for one or more specific sites, select **Specific Sites**, then enter the System ID in the required field and select **Add**. Installers can add multiple sites.

Generate Report for

☐ All Sites ☒ Specific Sites

Enter System ID

Add

Step 5

Enter the Email Address to which the report should send, then select **Generate Report**.

Email Address

Reset

Generate Report

Enphase Service Manager Guide

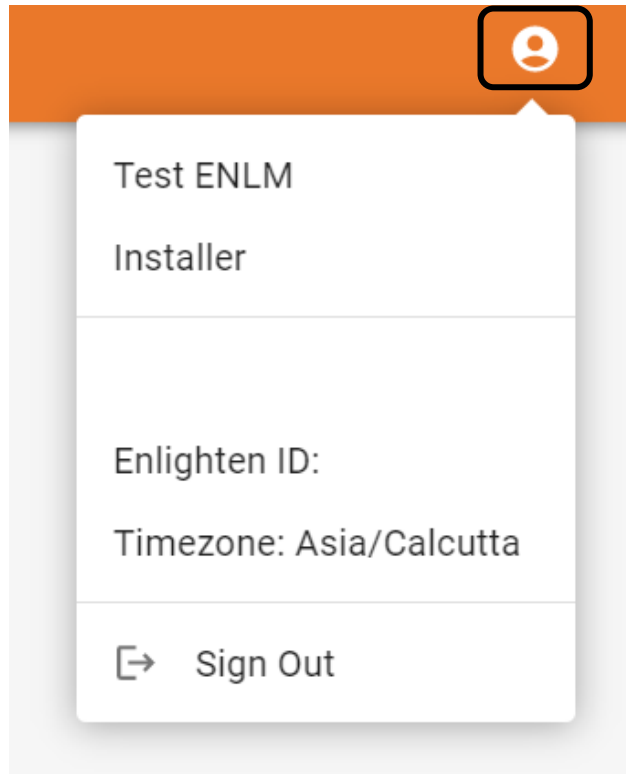
Desktop view

Profile

Profile

Installers can view their personal account information by selecting the icon in the upper right-hand corner.

The pop-up window will display the installer's name, email address, time zone, and the option to sign-out of Enphase Service Manager.



Enphase Service Manager Desktop View:

Learning check

- Explain how to view RMA and case information in the Dashboard.
- Explain how to use the Search tool.
- Explain how to create a new RMA.
- Explain how to apply for and track Labor Reimbursement requests.
- Explain how to Initiate returns.
- Explain how to access system information.
- Explain how to run reports.
- Explain how to view the Profile.

Thank you

REVISION	DATE	DESCRIPTION
ING-00008	June 2023	Initial Version



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