Return Request Handling

RugaOps

1ST EDITION 2026

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Standard Operating Procedure

Purpose

The purpose of this SOP is to provide a consistent, efficient, and customer-friendly process for managing return requests while protecting company policies, reducing operational errors, and maintaining a positive customer experience.

Scope

This SOP applies to all customer return requests received through:

- Email
- Store customer accounts
- Contact forms
- Live chat
- Social media messages
- Helpdesk software (e.g., Gorgias, Zendesk, Freshdesk)

It covers:

- Return eligibility verification
- Return authorization
- Return shipping instructions
- Returned item inspection
- Refunds, exchanges, and store credits
- Escalation handling

It does not cover:

- Chargebacks
- Warranty claims
- Shipping carrier insurance claims
- Wholesale/B2B returns (unless otherwise specified)

Responsibilities

Suport Agents

- Respond to return requests within SLA
- Verify eligibility according to company policy
- Issue return instructions and Return Merchandise Authorization (RMA), if applicable
- Monitor return status
- Process approved refunds or exchanges
- Document all actions in your store and helpdesk systems

Senior Support Agent / Team Lead

- Review exceptions
- Handle escalated customer disputes
- Approve policy overrides within authorized limits
- Monitor return-related KPIs

Operations / Warehouse (if applicable)

- Receive returned items
- Inspect item condition
- Confirm return receipt
- Report discrepancies

Customer Support Manager / Business Owner

- Approve high-value exceptions
- Review fraud concerns
- Maintain and update return policies

Document Owner: *Customer Support Manager*
Version: *1.0*
Effective Date: *[Insert Date]*
Review Frequency: *Quarterly*

Step-by-step procedure

Step 1: Receive Return Request

Customer contacts support requesting a return.

Required Information

Verify:

1. Order number
2. Customer name
3. Email address used for purchase
4. Item(s) to be returned
5. Reason for return

SLA

1. Acknowledge within 1 business day
2. Resolve eligibility review within 2 business days

Step 2: Verify Order Details

Locate the order in Store.

Confirm:

- Order exists.
- Customer identity matches order information.
- Item was delivered.
- Return request falls within return window.

Document findings in the ticket.

Step 3: Determine Eligibility

Review against return policy.

- **Eligible**

  Examples:
  - *Eligible Examples*
  - *Unused item*
  - *Original packaging present*
  - *Return requested within policy window*
  - *Wrong item received*
  - *Damaged or defective item*

- **Potentially Ineligible**

  Examples:
  - *Return window expired*
  - *Final-sale item*
  - *Personalized/customized item*
  - *Used or damaged by customer*
  - *Missing major components*

Step 4: Decision Point – Is Return Eligible?

If Eligible

Proceed to Step 5.

If Not Eligible

- Explain the specific policy reason.
- Offer alternative solutions if appropriate:
  - Store credit
  - Partial refund
  - Replacement discount
- Close ticket after customer notification

Step 5: Issue Return Authorization

Provide:

- Return instructions
- Return address
- RMA number (if used)
- Return deadline
- Shipping label (if company policy allows)

Update ticket status to:

Awaiting Return Shipment

Record:

- Authorization date
- RMA number
- Return reason

Step 6: Monitor Return Shipment

Track return shipment if tracking is available.

Follow-Up

- If no shipment activity within 14 days:
- Send reminder
- Keep ticket open for 7 additional days
- Close as abandoned if no response

Step 7: Receive and Inspect Return

When returned item arrives:

Verify:

- Correct item received
- Condition matches customer claim
- Packaging status
- Missing accessories/components

Record inspection results.

Inspection Time Target
Within 2 business days of receipt.

Step 8: Decision Point – Does Inspection Match Return Request?

Yes

Proceed to Step 9

No

Escalate for review

Possible outcomes:

- Partial refund
- Return rejection
- Customer contact for clarification
- Management review

Document all findings with photos when possible.

Step 9: Process Resolution

Refund

- *Process through store payment system*

Verify:

- *Correct amount*
- *Original payment method*

Exchange

- *Create replacement order*

Confirm:

- *Product availability*
- *Shipping address*

Store Credit

- *Issue according to company policy*

Step 10: Notify Customer

Send confirmation including:

- Resolution type
- Refund amount or exchange details
- Processing timeline
- Reference number

Update ticket status to:

Resolved

Decision Matrix

SITUATION	ACTION
Within policy window and unused	*Approve return*
Damaged on arrival	*Approve replacement or refund*
Wrong item shipped	*Approve return at company expense*
Return window exceeded by less than 7 days	*Review for exception*
Return window exceeded significantly	*Deny unless approved exception*
Final-sale item	*Deny unless defective*
Customer received defective item	*Approve refund, replacement, or store credit*
Suspected fraud	*Escalate immediately*

Escalation Rules

Escalate to Team Lead or Manager when:

Customer Escalation

- *Customer threatens chargeback*
- *Customer requests supervisor review*
- *Customer becomes abusive*
- *Social media complaint gains visibility*

Policy Escalation

- *Return falls outside policy but exception may be warranted*
- *VIP customer request*
- *Ambiguous eligibility*

Public Reputation Risk

- *Social media complaints gaining visibility*
- *Influencer or wholesale customer issues*

Financial Escalation

- *Refund exceeds predefined threshold (e.g., $200).*
- *Multiple orders affected*
- *Bulk return requests*

Fraud Escalation

- *Indicators include:*
- *Frequent return history*
- *Multiple accounts with same details*
- *Inconsistent return claims*
- *Empty-box or item-switch allegations*

Exceptions

The business may approve exceptions for:

Shipping Delays

If carrier delays caused late delivery or return window issues.

Product Defects

Even outside the standard return window when defect is verified.

Customer Experience Recovery

One-time goodwill exception for:

- Loyal customers
- Significant service failures
- Operational mistakes

Management Override

Customer Support Manager or Business Owner may approve:

- *Policy exceptions*
- *Partial refunds*
- *Returnless refunds*
- *Replacement shipments*

All exceptions must be documented with:

- *Reason*
- *Approver name*
- *Financial impact*

Documentation Requirements

Each return ticket must include:

- *Order number*
- *Return reason*
- *Eligibility decision*
- *Dates of communication*
- *Tracking information*
- *Inspection notes*
- *Resolution provided*
- *Refund amount (if applicable)*

Use standardised tags such as:

- *Return-Approved*
- *Return-Denied*
- *Exchange*
- *Refund*
- *Store-Credit*
- *Defective*
- *Wrong-Item*
- *Fraud-Review*

KPI Considerations

Track the following metrics monthly:

Operational KPIs

- *Return request volume*
- *Return rate (% of orders)*
- *Average first response time*
- *Average return resolution time*
- *Refund processing time*

Quality KPIs

- *Customer Satisfaction Score (CSAT)*
- *Return-related complaint rate*
- *Reopened ticket rate*
- *Escalation rate*

Financial KPIs

- *Refund value as % of revenue*
- *Exchange conversion rate*
- *Store credit utilization rate*
- *Cost per return*

Risk KPIs

- *Fraud-related returns*
- *Policy exception rate*
- *Chargeback rate after return denial*

Recommended Targets for Small Businesses

KPI	TARGET
First Response Time	*< 1 business day*
Refund Resolution Time	*< 3 business days*
Refund Approval Rate	*Monitor trend*
Refund Rate (% of Orders)	*Within business target*
Escalation Rate	*< 10%*
Customer Satisfaction (CSAT)	*≥ 90%*
Documentation Compliance	*≥ 95%*
Repeat Refund Requests	*Monitor trend*
Policy Exception Rate	*< 5%*

SOP Review

This SOP should be reviewed quarterly or whenever:

- *Return policies change*
- *Store workflows change*
- *New fulfillment partners are introduced*
- *Return volume increases significantly*

Additional Steps

Return Policy Verification Before Approval

Add checklist items such as:

- Product category restrictions
- Return window calculation from delivery date
- Country-specific return requirements
- Promotional or bundle purchases
- Gift purchases

Risk: Agents may approve returns that violate policy.

Customer Evidence Collection

For damaged, defective, or incorrect-item claims, require:

- Photos of product
- Photos of packaging
- Shipping label image
- Short description of issue

Before issuing return labels whenever possible.

Benefit:

- Reduces unnecessary returns
- Allows instant replacement decisions
- Helps identify fulfillment issues

Return Shipping Cost Decision

Add a decision tree for consistent decisions:

SCENARIO	SHIPPING COST
Defective item	Company pays
Wrong item sent	Company pays
Customer changed mind	Company pays
Exchange requested	Depends on policy

Return Label Generation Process

Important operational detail:

- Who creates labels?
- Which carrier is used?
- How are labels sent?

For small teams this should be standardised.

Example:

All return labels are generated through your store and attached to the support ticket.

Return Receipt Confirmation

Many customers become anxious after shipping returns.

Add:

When warehouse receives return:

- Update ticket immediately
- Send automated confirmation email

Example:

"We've received your return and inspection will be completed within 2 business days."

Inventory Disposition Step

After inspection:

- Restock
- Refurbish
- Liquidate
- Dispose

Without this step inventory accuracy suffers.

Root Cause Coding

Capture return reasons consistently that supports future improvements.

Example codes:

- Wrong size
- Defective
- Arrived damaged
- Changed mind
- Not as described
- Shipping delay
- Duplicate order

Operational Risks

Return Fraud

Common examples:

- Empty box returns
- Product swapping
- Wardrobing (use then return)
- Multiple account abuse

Mitigation:

- Photo documentation
- Inspection photos
- Return history tracking
- Fraud review queue

Refund Before Inspection

Some agents may process refunds too early.

Risk:

- Item never returned
- Damaged item returned
- Wrong item returned

Best practice:

Refund only after inspection except for low-value items.

SLA Failure During Peak Seasons

Current targets are reasonable but difficult during:

- Black Friday
- Holiday season
- Product launches

Consider surge procedures.

Chargeback Exposure

Denied returns often become chargebacks.

Add:
Any customer mentioning a chargeback is escalated immediately.

Inconsistent Exceptions

Add approval thresholds.

REFUND VALUE	APPROVAL REQUIRED
<$50	Agent
$50-$200	Team Lead
>$200	Manager

Common Customer Complaints

These are the complaints most e-commerce stores receive.

"I Haven't Received My Refund"

Root cause:

- Bank processing delay

Solution:
Create standard communication templates.

"Why Do I Have To Pay Return Shipping?"

Especially common for:

- International orders
- Change-of-mind returns

Requires clear policy communication.

"My return was delivered, but nobody updated me."

Solution:

- Automatic return-received notifications.

"The item doesn't fit."

Often the largest return category.

Opportunity:

- Better size guides
- Product videos
- Fit recommendations

"My return was denied."

Agents need standardised denial templates explaining:

- Exact policy section
- Alternative options
- Escalation path

"The product looks different from the website."

Signals merchandising issue.

Track separately from:

- Changed mind
- Didn't like item

Return FAQ

What is your return policy?

We accept returns within 30 days of delivery for eligible items that are unused, in their original condition, and include original packaging and tags where applicable.

How do I start a return?

Contact our support team with:

- Your order number
- The item(s) you'd like to return
- The reason for the return

If your return is approved, we will provide return instructions and any applicable return shipping information.

What Items Cannot Be Returned?

The following items are generally not eligible for return:

- Final sale items
- Gift cards
- Personalized or custom-made products
- Items that have been used or damaged after delivery

Who pays for return shipping?

If the item is defective, damaged, or we shipped the wrong item, we will cover return shipping costs.

For customer preference returns (such as ordering the wrong item or changing your mind), return shipping may be the customer's responsibility.

What if my item arrived damaged or defective?

Please contact us as soon as possible and include:

- Photos of the product
- Photos of the packaging
- A description of the issue

We will review the claim and provide a resolution.

How long does it take to receive a refund?

Once we receive and inspect your return, approved refunds are typically processed within 2 business days.

After processing, your financial institution may require additional time before the funds appear in your account.

Can I exchange an item?

Yes, exchanges may be available depending on product availability. Contact support for assistance.

How will I know the status of my return?

We will notify you when:

- Your return is approved
- Your returned item is received
- Your refund or exchange has been processed

What if my return is not approved?

If a return request does not meet our return policy requirements, we will explain the reason and may offer alternative solutions when appropriate.

How can I contact support?

Please contact our support team through our contact page or reply to your order confirmation email for assistance.

Internal Return Checklist

CUSTOMER VERIFICATION	DONE
Order number provided	✓
Customer identity verified	
Order located	
Delivery coonfirmed	

RETURN DECISION	DONE
Approved	✓
Denied	
Escalated	

Reason Code: ——

EVIDENCE COLLECTION	DONE
Photos received (if required)	✓
Packaging photos received	
Shipping label photo received	
Defect/damage verified	

ELIGIBILITY REVIEW	DONE
Within return window	✓
Item eligible for return	
Not final sale	
Not custom/personalized	
Meets condition requirements	

RETURN AUTHORIZATION	DONE
Return instructions sent	✓
RMA assigned (if used)	
Return label issued (if applicable)	
Order tagged	

RETURN RECEIPT	DONE
Reason code assigned	✓
Root cause recorded	
Ticket resolved or escalated	

DOCUMENTATION	DONE
Ticket updated	✓
Resolution type recorded	
Refund amount recorded	
Reason code recorded	
Ticket closed	

RESOLUTION	DONE
Refund issued	✓
Exchange created	
Store credit issued	
Return denied after inspection	

Ticket Category Structure

Primary Category: Returns & Refunds

Subcategories

Return Request

- Return Eligible
- Return Ineligible
- Return Window Question

Refund Request

- Refund Pending
- Refund Issued
- Refund Status Inquiry

Exchange Request

- Size Exchange
- Product Exchange
- Out-of-Stock Exchange

Product Condition Issues

- Damaged Item
- Defective Item
- Missing Parts

Fulfillment Issues

- Wrong Item Received
- Wrong Variant Received
- Missing Item

Return Logistics

- Return Label Request
- Return Tracking Issue
- Return Package Delivered

Exceptions & Reviews

- Policy Exception Request
- Goodwill Adjustment
- Fraud Review

Recommended Priority Levels

PRIORITY	CRITERIA
P1	Chargeback threat, legal complaint
P2	High-value order, executive escalation
P3	Damaged/defective product
P4	Standard return request
P5	General policy question

Escalation Matrix

SCENARIO	AGENT	SENIOR AGENT	MANAGER
Standard return	*Approve*	-	-
Refund under $50	*Approve*	-	-
Refund $50-$150	*Review*	*Approve*	-
Refund over $150	*Escalate*	*Review*	*Approve*
Policy exception	*Escalate*	*Review*	*Approve*
VIP customer request	*Escalate*	Review	*Approve*
Suspected fraud	*Escalate*	*Review*	*Approve*
Chargeback threat	*Escalate*	*Review*	*Approve*
Social media complaint	*Escalate*	*Review*	*Approve*
Returnless refund	*Escalate*	*Review*	*Approve*
Customer dispute after denial	*Escalate*	*Review*	*Approve*

Escalation SLA

ESCALATION TYPE	TARGET RESPONSE
Fraud Review →	*4 business hours*
Chargeback Threat →	*2 business hours*
VIP Customer →	*Same business day*
Manager Approval →	*1 business day*
Standard Escalation →	*1 business day*

Improvements

A support operations manager would ask:

“How to make sure the process is executed consistently across the team?”

1. Add a Return Decision Framework

Create a structured decision tree:

QUESTION	YES	NO
Order delivered?	Continue	Hold
Within return window?	Continue	Exception review
Final sale item?	Deny	Continue
Defective claim?	Evidence required	Continue
Product unused?	Approve	Review

Goal:

- Reduce agent judgment
- Improve consistency
- Reduce training time

2. Define Return Reason Taxonomy

Most ecommerce teams fail here.

Recommended return codes:

Product Issues

- Defective
- Damaged in transit
- Wrong item received
- Missing item

Customer Preference

- Changed mind
- Didn't like product
- Ordered by mistake

Fit & Sizing

- Too small
- Too large
- Poor fit

Review:

- Policy compliance
- Correct refund amount
- Documentation quality
- Escalation accuracy
- Customer communication quality

Merchandising Issues

- Not as described
- Different from photos
- Quality expectations not met

Fulfillment Issues

- Duplicate shipment
- Wrong variant sent

Without standardised coding:

- Reporting becomes unreliable
- Product teams cannot identify trends

3. Add Ticket Documentation Standards

Define mandatory fields.

Example:

Required ticket fields:

- Order number
- Return reason code
- Approval/denial reason
- Resolution type
- Refund amount
- Agent name
- Exception flag
- SKU(s)

Missing documentation creates reporting gaps later.

4. Add Return Abuse Monitoring

Most stores wait too long before implementing this.

Track:

Customer Level

- Number of returns
- Lifetime return rate
- High-value returns
- Serial returners

Product Level

- Return rate by SKU
- Return rate by category

Agent Level

- Approval rate
- Exception rate
- Refund value issued

This helps identify:

- Fraud
- Product quality issues
- Training issues

5. Define Refund Authority Levels

Support operations prefer clear controls.

Example:

REFUND AMOUNT	AUTHORITY
<$50	Agent
$50-$150	Senior Agent
$150-$500	Manager
>$500	Business Owner

Same for:

- Returnless refunds
- Goodwill credits
- Policy exceptions

6. Create a Returnless Refund Policy

Many stores waste money processing low-value returns.

ITEM VALUE	ACTION
<$15	Refund without return
$15-$40	Manager discretion
>$40	Standard return

Benefits:

- Lower support costs
- Lower shipping costs
- Faster resolution

7. Add Communication Templates

Create templates for:

- **Refund Approved**
- **Refund Denied**
- **Waiting For Evidence**
- **Escalated Review**
- **Refund Processed**
- **Lost Package Investigation**

Benefits:

- Consistency
- Faster responses
- Reduced training time

8. Add Service-Level Agreements (SLAs) by Stage

Support ops teams should track every stage.

STAGE	TARGET
First response	<24 hrs
Eligibility review	<48 hrs
Label issuance	Same day
Return inspection	<2 days
Refund processing	<2 days
Total cycle time	<10 days

This creates accountability.

9. Add Quality Assurance Reviews

A mature SOP includes QA.

Example:

Review 10% of return tickets monthly.

Evaluate:

- Policy compliance
- Documentation quality
- Tone of communication
- Correct resolution

QA score target:

95%+

10. Add Operational Reporting

Support Ops would require:

Weekly Dashboard

- Return volume
- Refund value
- Escalations

Monthly Dashboard

- Top return reasons
- Top returned SKUs
- Return rate by product category
- CSAT
- Exception rate

This converts returns from a support activity into a business intelligence source.

11. Define Cross-Functional Feedback Loops

The strongest e-commerce teams don't stop at processing returns.

Returns should generate insights for:

- Product Team
- High defect rates
- Merchandising Team
- Misleading product descriptions
- Fulfillment Team
- Wrong-item shipments
- Leadership
- Margin impact

Example trigger:

Any SKU with a return rate above 10% for two consecutive months must be reviewed.

12. Add Capacity Planning Guidance

For a 1–5 agent team, returns can spike dramatically.

Examples:

- Black Friday
- Holiday season
- Product launches

Create surge procedures:

- Temporary SLA adjustments
- Prioritization rules
- Auto-responses
- Overtime approval process



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