Shopify Implementation Guide - Damaged Product

RugaOps

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Implementation Guide

Implementation Guide: Damaged Product SOP for Shopify Stores

Objective

Implement a scalable damaged-product workflow using Shopify and a helpdesk platform (e.g., Gorgias, Zendesk, Richpanel, Help Scout, Re:amaze) that can be managed by 1–5 support agents.

This implementation turns the SOP into an operational system with clear workflows, controls, reporting, automation, and continuous improvement mechanisms suitable for a growing Shopify business.

Phase 1: Configure Shopify

1. Create Internal Order Tags

Create the following standard tags:

Damage Investigation

- damage_claim_open
- damage_claim_pending_customer
- damage_claim_under_review
- damage_claim_escalated

Resolution Tags

- damage_refund_issued
- damage_replacement_sent
- damage_partial_refund
- damage_store_credit

Root Cause Tags

- damage_carrier
- damage_packaging
- damage_manufacturing
- damage_warehouse
- damage_unknown

Risk Tags

- damage_repeat_claimant
- damage_high_value
- damage_fraud_review

2. Create Customer Tags

Used for fraud prevention and customer history tracking.

Examples:

- 1_damage_claim
- 2_damage_claims
- vip_customer
- damage_exception_used

3. Create Internal Notes Template

Use Shopify order notes or metafields:

Damage Claim Review

Date:
Agent:

Claim Type:
☐ Carrier
☐ Packaging
☐ Manufacturing
☐ Warehouse
☐ Unknown

Evidence Received:
☐ Product Photos
☐ Packaging Photos
☐ Shipping Box Photos
☐ Shipping Label

Resolution:
☐ Replacement
☐ Refund
☐ Partial Refund
☐ Store Credit

Escalated:
☐ Yes
☐ No

Notes:

Phase 2: Configure Helpdesk

1. Create Ticket Categories

Main Category:

- Damaged Product

Subcategories:

- Broken Item
- Shipping Damage
- Cosmetic Damage
- Missing Components
- Defective On Arrival

2. Create Ticket Statuses

Recommended workflow:

New
↓
Awaiting Customer Photos
↓
Under Review
↓
Approved
↓
Replacement Pending
OR
Refund Pending
↓
Resolved
↓
Closed

3. Build Macros

Macro 1: Request Damage Evidence

Subject:

We're reviewing your damage claim.

Message:

Thank you for contacting us.
To review your claim, please reply with:

- *Photo of the damaged product*
- *Photo of the product packaging*
- *Photo of the shipping box*
- *Photo of the shipping label (if available)*

Once received, we'll review the claim and provide a resolution as quickly as possible.

Macro 2: Replacement Approved

We've reviewed your claim and approved a replacement.

Your replacement order has been submitted and will ship shortly.

We'll send tracking information once it becomes available.

Macro 3: Refund Approved

Thank you for the information provided.

To continue our review, we need additional photos showing:

[Specific Request]

Once received, we'll continue processing your claim.

Phase 3: Create Decision Matrix

Agent Authority Table

ACTION	AGENT	SENIOR AGENT	MANAGER
Refund under $50	*Yes*	*Yes*	*Yes*
Refund $50–$200	*No*	*Yes*	*Yes*
Refund over $200	*No*	*No*	*Yes*
Policy exception	*No*	*Review*	*Yes*
Fraud review	*No*	*Yes*	*Yes*

Agent Authority Table

Functional Damage

Resolution:
- Replacement

If out of stock:
- Full refund

Cosmetic Damage

Resolution:
- Partial refund

Suggested:
- 10–20%

Missing Components

Resolution:
- Send replacement part

If unavailable:
- Replacement unit

Shipping Box Damage Only

Resolution:
- No compensation unless product affected

Phase 4: Implement Shopify Flow Automations

If using Shopify Flow:

Automation 1

Trigger

Tag added:

damage_claim_open

Action

Assign support queue.

Automation 2

Trigger

Tag added:

damage_replacement_sent

Action

Add internal note:
Replacement processed.
Follow up after delivery.

Automation 3

Trigger

Customer tagged:

2_damage_claims

Action

Add order tag:

damage_repeat_claimant

Notify manager.

Phase 5: Create Fraud Controls

High-Risk Claim Criteria

Escalate if:

- Claim exceeds $200
- Customer has 2+ prior claims
- Photos appear inconsistent
- Customer requests refund without evidence
- Multiple orders shipped to different addresses

Evidence Requirements

Orders Under $50

Require:

- Product photo

Orders $50–$200

Require:

- Product photo
- Packaging photo

Orders Above $200

Require:

- Product photo
- Packaging photo
- Shipping box photo

Manager review required.

Phase 6: Create Reporting Dashboard

Track monthly.

Customer Metrics

- Damage claim volume
- Damage claim rate
- CSAT
- Resolution time

Financial Metrics

- Refund amount
- Replacement cost
- Carrier reimbursement recovered

Product Metrics

Top damaged SKUs:

SKU	CLAIMS	RATE
SKU-1	*15*	*4.2%*
SKU-2	*11*	*3.8%*

Carrier Metrics

CARRIER	CLAIMS
DHL	*8*
UPS	*14*
Fedex	*6*

Phase 7: Build Customer Self-Service Resources

Create Help Center articles:

Required

1. My Item Arrived Damaged
2. How to Submit Photos
3. Refund vs Replacement Policy
4. Damage Claim Timeframes
5. Returning Damaged Products
6. Cosmetic Damage Guidelines
7. Replacement Shipment FAQs

Phase 8: Monthly Operations Review

Review once per month.

Support Manager Checklist

Claims

Total damage claims
Damage claim rate

Costs

Total refunds
Total replacements

Trends

Most damaged products
Most damaged carrier routes
Repeat claim customers

Actions

Document:

Actions

Document:

Issue:
Root Cause:
Corrective Action:
Owner:
Due Date:

Example:

Issue:
SKU-104 damaged in 7% of shipments

Root Cause:
Weak outer packaging

Corrective Action:
Increase carton strength

Owner:
Operations Manager

Due Date:
July 15

Success Criteria (90 Days After Launch)

KPI	TARGET
First Response Time	*<8 business hours*
Damage Claim Resolution Time	*< 48 hours*
Customer Satisfaction (CSAT)	*>90%*
Escalation Rate	*<10%*
Carrier Recovery Rate	*>70% of eligible claims filed*
Damage Claim Documentation Compliance	*>95%*
Repeat Damage Rate	*Decreasing month-over-month*



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