Shopify Implementation Guide - Missing Package

RugaOps

1ST EDITION 2026

Contents

PHASE 1: CONFIGURE SHOPIFY & SUPPORT TOOLS 4

PHASE 2: DEFINE RESOLUTION AUTHORITY 7

PHASE 3: BUILD STANDARD WORKFLOWS 8

PHASE 4: CREATE MACROS 11

PHASE 5: BUILD SHOPIFY FLOW AUTOMATIONS 12

PHASE 6: CREATE CARRIER CLAIM PROCESS 14

PHASE 7: REPORTING SETUP 15

PHASE 8: CREATE INTERNAL QA PROCESS 17

PHASE 9: PUBLISH CUSTOMER SELF-SERVICE RESOURCES 18

PHASE 10: 30-DAY ROLLOUT PLAN 19

SUCCESS CRITERIA AFTER 90 DAYS 20

Implementation Guide

Implementation Guide: Missing Package SOP for a Shopify Store

Objective

Implement a scalable missing-package process that:

- Reduces support workload
- Improves customer satisfaction
- Controls refund and replacement costs
- Prevents abuse and fraud
- Produces useful operational reporting

Designed for Shopify stores with 1–5 support agents.

Phase 1: Configure Shopify & Support Tools

Step 1: Create Ticket Categories

In your helpdesk (e.g., Gorgias, Zendesk, Freshdesk, Help Scout), create the following categories:

Primary Category

- Missing Package

Subcategories

- Delivered Not Received (DNR)
- Lost In Transit
- Delayed Shipment
- No Tracking Updates
- Wrong Address
- Carrier Investigation
- Replacement Requested

Step 2: Create Required Ticket Tags

Every missing package ticket should receive at least one tag.

Tracking Status Tags

- MP_DNR
- MP_DELAYED
- MP_LOST
- MP_INVESTIGATION

Resolution Tags

- MP_REPLACED
- MP_REFUNDED
- MP_DENIED
- MP_CARRIER_PAID

Risk Tags

- MP_HIGH_VALUE
- MP_REPEAT_CLAIM
- MP_FRAUD_REVIEW

Step 3: Create Shopify Order Tags

Agents should apply order-level tags directly in Shopify.

Examples:

- Missing Package
- Carrier Claim
- Replacement Sent
- Refund Issued
- High Risk

This creates visibility for future orders.

Phase 2: Define Resolution Authority

Agent Authority Matrix

Support Agent

May approve:

- Replacement under $50
- Refund under $50
- Carrier investigation requests

Team Lead

May approve:

- Replacement $50-$200
- Refund $50-$200
- One-time exceptions

Manager

Required for:

- Orders over $200
- Repeat claims
- Fraud concerns
- Multiple replacements

Phase 3: Build Standard Workflows

Workflow A: Delayed Shipment

Trigger

Tracking active but shipment delayed.

Agent Actions

1. Verify order.
2. Review tracking.
3. Compare against expected transit time.
4. Inform customer.
5. Set follow-up reminder.

Resolution

- Continue monitoring
- Open carrier investigation if threshold exceeded

Workflow B: Delivered Not Received (DNR)

Trigger

Tracking shows delivered.

Agent Checklist

Customer confirms:

- Checked mailbox
- Checked neighbors
- Checked household members
- Checked safe places
- Waited 48 hours

Next Steps

Review:

- Delivery photo
- Proof of delivery
- GPS confirmation (if available)

Decision:

- Investigate
- Replace
- Refund
- Escalate

Workflow C: Lost In Transit

Trigger

No movement:

- Domestic: 7+ days
- International: 14+ days

Agent Actions

1. Open carrier claim.
2. Notify customer.
3. Schedule update reminders.
4. Escalate if high value.

Phase 4: Create Macros

Macro 1: Initial Missing Package Response

Subject:

We're Investigating Your Shipment

Message:

Thank you for reaching out. We understand you're having trouble locating your package. We're reviewing the shipment information and will update you as soon as possible. In the meantime, please confirm your shipping address and whether you've checked with household members, neighbors, and any secure delivery locations.

Macro 2: Delayed Shipment

Your package remains in transit with the carrier. While delays can occasionally occur, we are monitoring the shipment closely. We will provide another update within 3 business days.

Macro 3: Carrier Investigation Opened

We've opened an investigation with the carrier regarding your shipment. Carrier investigations typically require 5–10 business days. We'll keep you informed throughout the process.

Macro 4: Replacement Approved

We've arranged a replacement shipment for your order. You will receive tracking information once the new package has been dispatched.

Macro 5: Refund Approved

We've processed a refund for your order. Please allow your financial institution several business days to post the credit to your account.

Phase 5: Build Shopify Flow Automations

If using Shopify Flow:

Automation 1: High-Value Order Alert

Trigger

Order value > $200

Action

Add tags:

- High Value
- Signature Required

Notify support.

Automation 2: Repeat Claim Alert

Trigger

Order tagged:

- Missing Package

AND

Customer has prior missing package orders.

Action

Add:

- Repeat Claim
- Manager Review

Automation 3: Replacement Order Tracking

Trigger

Replacement order created.

Action

Tag:

- Replacement Sent

Create internal note.

Phase 6: Create Carrier Claim Process

Step 11: WeMaintain Carrier Reference Sheet

Document:

CARRIER	CLAIM URL	FILING DEADLINE	AVERAGE RESOLUTION
USPS	Internal reference	X days	X days
UPS	Internal reference	X days	X days
Fedex	Internal reference	X days	X days
DHL	Internal reference	X days	X days

Store in internal documentation.

Phase 7: Reporting Setup

Weekly Report

Track:

METRIC	TARGET
Missing Package Rate	<1%
Resolution Time	<5 business days
DNR Rate	Trend
Replacement Cost	Trend
Refund Cost	Trend
Carrier Recovery Rate	Increasing

Weekly Report

Review:

Top Carriers by Claims

- Claims volume
- Loss rate
- Recovery rate

Top Geographic Areas

- Missing package concentration
- Porch theft hotspots

Fraud Review

- Repeat claim customers
- High-risk addresses
- Excessive replacements

Phase 8: Create Internal QA Process

Review 10–20 missing package tickets monthly.

Evaluate:

- SOP compliance
- Proper escalation
- Documentation quality
- Customer communication quality
- Correct financial decisions

Score agents on:

CATEGORY	WEIGHT
Accuracy	40%
Documentation	20%
Policy Compliance	20%
Customer Experience	20%

Phase 9: Publish Customer Self-Service Resources

Add Help Center articles:

1. Tracking says delivered but I can't find my package
2. Why has my tracking stopped updating?
3. What happens if my package is lost?
4. Shipping delays and carrier disruptions
5. How carrier investigations work

Link these articles in support macros to reduce ticket volume.

Phase 10: 30-Day Rollout Plan

Week 1

- Finalize SOP
- Create tags
- Create macros
- Train agents

Week 2

- Implement Shopify Flow automations
- Publish FAQ articles
- Start reporting

Week 3

- Audit first cases
- Adjust decision thresholds
- Refine macros

Week 4

- Review KPIs
- Measure refund/replacement costs
- Identify fraud patterns
- Finalize ongoing management cadence

Success Criteria After 90 Days

- Missing package resolution time under 5 business days
- CSAT above 90%
- Consistent agent decisions
- Carrier claim recovery process established
- Reduction in unnecessary refunds and replacements
- Reliable reporting on missing-package costs and trends

This implementation plan is practical for a small Shopify operation and can scale from a solo support agent to a 5-person support team without major process changes.



1ST EDITION 2026

SHOPIFY IMPLEMENTATION GUIDE - MISSING PACKAGE