Shopify Implementation Guide - Return Requests

RugaOps

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Implementation Guide

Shopify Return Operations Implementation Guide

Objective

Implement a scalable return management process in Shopify that:

- Standardizes return handling
- Reduces agent workload
- Improves customer experience
- Provides reporting and analytics
- Supports a team of 1–5 support agents

Phase 1: Foundation Setup (Week 1)

Step 1: Define Return Policy Rules

Document the exact rules agents will follow.

Return Window

Example:

- 30 days from delivery date

Eligible Items

Example:

- Unused
- Original packaging
- Original tags attached

Non-Returnable Items

Example:

- Final sale items
- Gift cards
- Personalized products

Return Shipping Rules

Example:

SCENARIO	SHIPPING PAID BY
Defective item	*Store*
Wrong item	*Store*
Damaged item	*Store*
Customer preference	*Customer*

Store this policy in:

- Shopify Store Policies
- Help Center
- Agent SOP

Step 2: Create Standard Return Reason Codes

Use the same codes everywhere.

Product Defect

- DEFECTIVE
- DAMAGED_TRANSIT
- MISSING_PARTS

Fulfillment Errors

- WRONG_ITEM
- WRONG_VARIANT
- MISSING_ITEM

Customer Preference

- CHANGED_MIND
- ORDERED_BY_MISTAKE
- NO_LONGER_NEEDED

Product Experience

- NOT_AS_DESCRIBED
- QUALITY_ISSUE

Sizing

- TOO_SMALL
- TOO_LARGE
- POOR_FIT

These become the source of all reporting.

Phase 2: Shopify Configuration (Week 1)

Step 3: Create Shopify Order Tags

Recommended tags:

Return Workflow

- Return Requested
- Return Approved
- Return Denied
- Return Received
- Refund Processed
- Exchange Requested

Exception Workflow

- Return Exception
- Manager Review

Risk Workflow

- Fraud Review
- Repeat Returner

Resolution Types

- Refunded
- Exchanged
- Store Credit
- Returnless Refund

Agents apply tags consistently.

Step 4: Create Customer Tags

Recommended tags:

- VIP Customer
- Repeat Returner
- High Return Rate
- Fraud Watch

Benefits:

- Faster decision making
- Better escalation management

Phase 3: Helpdesk Setup (Week 1–2)

If using:

- Gorgias
- Zendesk
- Freshdesk
- Reamaze

Create required ticket fields.

Required Fields

Return Reason

Dropdown using standardized reason codes.

Resolution Type

Dropdown:

- Refund
- Exchange
- Store Credit
- Returnless Refund
- Denied

Return Status

Dropdown:

- Requested
- Awaiting Photos
- Approved
- In Transit
- Received
- Closed

Exception Required

Checkbox

Refund Amount

Currency field

Phase 4: Customer Communication Templates

Template 1: Return Approved

Subject:

Return Approved – Order #

{{order_number}}

Contents:

- Return approved
- Return instructions
- Return deadline
- Tracking expectations

Template 2: Awaiting Photos

Request:

- Product photos
- Packaging photos
- Shipping label photo

Template 3: Return Received

Notify customer:

- Return received
- Inspection underway
- Expected completion timeline

Template 4: Refund Processed

Include:

- Refund amount
- Refund method
- Expected bank processing timeline

Template 5: Return Denied

Include:

- Specific policy reason
- Alternative options
- Escalation path

Phase 5: Automation Setup (Week 2)

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

Option A: Shopify Flow

Recommended for Shopify plans that support Flow.

Create workflows.

Workflow 1

Trigger:

Order tagged:

"Return Approved"

Action:

Send internal notification
Assign support owner

Workflow 2

Trigger:

Refund issued

Action:

- Add tag "Refund Processed"
- Send customer email

Workflow 3

Trigger:

Customer tagged "Repeat Returner"

Action:

- Notify manager

Option B: Return Management App

Recommended apps:

- Loop Returns
- ReturnGO
- AfterShip Returns
- Rich Returns

Implementation goals:

- Self-service portal
- Label generation
- Return tracking
- Automated notifications

Phase 7: Returnless Refund Program

Create approval limits.

Support Manager Checklist

Agents

Can approve:

- Standard returns
- Refunds up to $50

Cannot approve:

- Policy exceptions
- Fraud reviews

Senior Agent

Can approve:

- Refunds $50–$150
- One-time goodwill credits

Manager / Owner

Approves:
a
- Refunds above $150
- Returnless refunds above threshold
- Fraud exceptions
- VIP exceptions

Phase 8: Reporting Dashboard

Build weekly report.

Suggested Threshold

Metrics

Volume

- Return requests
- Approved returns
- Denied returns

Financial

- Refund amount
- Store credit amount
- Exchange amount

Customer Experience

- CSAT
- Reopened tickets

Efficiency

- First response time
- Resolution time
- Inspection time

Phase 9: Product Insights Program

Monthly review.

Suggested Threshold

Identify

High-Return Products

Threshold example:

Return rate > 10%

High Defect Products

Threshold example:

5+ defect claims per month

Merchandising Problems

Track:

- Not as described
- Different from photos

Share findings with:

- Product team
- Merchandising team
- Fulfillment team

Phase 10: Quality Assurance Process

Review 10% of return tickets monthly.

Suggested Threshold

Score agents on:

CATEGORY	WEIGHT
Policy compliance	*30%*
Documentation	*20%*
Accuracy	*25%*
Communication quality	*25%*

Target:

95% QA score.

Recommended "Minimum Viable Return Operations Stack"

For a small Shopify business (1–5 agents):

Shopify

- Order tags
- Customer tags
- Shopify Flow automations

Helpdesk

- Gorgias or Zendesk
- Required ticket fields
- Macros/templates

Returns

- Self-service returns app
- Automated email updates

Reporting

- Weekly return dashboard
- Monthly SKU return analysis

This setup typically reduces manual return handling by 30–60%, improves reporting accuracy, and creates a process that can scale without requiring additional support headcount.



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