Shopify Implementation Guide - Wrong Item Received

RugaOps

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Contents

PHASE 1: CONFIGURE SHOPIFY & HELP DESK 4

PHASE 2: BUILD THE WORKFLOW 6

PHASE 3: RESOLUTION MATRIX 8

PHASE 4: SHOPIFY OPERATIONAL SETUP 10

PHASE 5: ROOT CAUSE TRACKING 12

PHASE 6: ESCALATION WORKFLOW 13

PHASE 7: REPORTING & KPIS 14

PHASE 8: AUTOMATION OPPORTUNITIES 15

PHASE 9: FAQ IMPLEMENTATION 17

RECOMMENDED LAUNCH PLAN 18

SUCCESS CRITERIA 19

Implementation Guide

Implementation Guide for Wrong Item Received SOP for Shopify

Objective

Implement a repeatable, measurable, and scalable process for handling "Wrong Item Received" claims within Shopify for a support team of 1–5 agents.

Phase 1: Configure Shopify & Help Desk

Step 1: Create Standard Ticket Tags

Create the following tags in your help desk (e.g., Gorgias, Zendesk, Freshdesk, Help Scout).

Issue Type

- wrong-item
- wrong-variant
- wrong-quantity
- fulfillment-error
- supplier-error

Resolution Type

- replacement-sent
- refund-issued
- store-credit-issued
- return-required
- returnless-resolution

Risk Level

- low-risk
- high-risk
- fraud-review

Escalation

- manager-review
- ops-review

Step 2: Create Shopify Order Tags

Use Shopify order tags for reporting.

Examples:

- Wrong Item Claim
- Replacement Sent
- Refund for Fulfillment Error
- Fraud Review
- Quality Investigation

These tags help identify affected orders later.

Step 3: Create Ticket Fields

Required support fields:

FIELD	REQUIRED
Order Number	Yes
Claim Type	Yes
SKU Ordered	Yes
SKU Received	Yes
Evidence Received	Yes
Resolution Type	Yes
Root Cause	Yes
Replacement Cost	Yes
Escalated	Yes/No

Phase 2: Build the Workflow

Customer Intake Process

Create a dedicated form or macro requesting:

- Order number
- Photo of received item
- Photo of shipping label
- Photo of packing slip
- Description of issue

Example Form Fields

What did you receive?

Dropdown:

- Wrong item
- Wrong size
- Wrong color
- Wrong quantity

Upload:

- Item photo
- Packaging photo

This eliminates multiple back-and-forth emails.

Agent Verification Checklist

Before any resolution:

Verify Order

Check Shopify:

- Ordered SKU
- Ordered variant
- Fulfillment status
- Tracking status

Verify Evidence

Confirm:

- Item matches photo
- SKU visible
- Packaging aligns with order

Review Customer History

Check:

- Previous claims
- Chargebacks
- Refund frequency

Phase 3: Resolution Matrix

Create Agent Decision Rules

Low-Value Orders (<$25)

If evidence is sufficient:

✓ Ship replacement immediately
No manager approval required.

Medium-Value Orders ($25-$100)

Require:

- Evidence review
- Order verification

Agent may:

✓ Replace
OR
✓ Refund
depending on stock availability.

High-Value Orders (>$100)

Require:

- Evidence
- Manager review

Potential return required.

Return Requirement Matrix

PRODUCT VALUE	RETURN REQUIRED
Under $20	No
$20-$100	Optional
Over $100	Usually Yes

Exceptions:

- Hygiene items
- Consumables
- International shipments

Phase 4: Shopify Operational Setup

Replacement Order Process

Create internal procedure:

Option A: Draft Order

1. Create Draft Order.
2. Add correct SKU.
3. Apply 100% discount.
4. Mark note:
   - Replacement for Wrong Item Claim
5. Send to fulfillment.

Option B: Shopify Exchange App

If using returns software:

- Generate replacement order automatically.
- Link to original order.

Preferred for growing stores.

Internal Notes Standard

Every claim should contain:

Shopify Order Note

Example:

- Wrong item claim verified.
- Ordered SKU: ABC123
- Received SKU: XYZ456
- Replacement approved.
- Root Cause: Warehouse Pick Error.

This allows future audits.

Phase 5: Root Cause Tracking

Create Root Cause Categories

Every ticket must be coded.

Approved Categories

- Wrong SKU Picked
- Wrong Variant Picked
- Incorrect Label
- Inventory Mapping Error
- Supplier Error
- Customer Error
- Fraudulent Claim
- Unknown

No ticket closes without a root cause.

Phase 6: Escalation Workflow

Manager Escalation Rules

Escalate when:

Financial

- Refund > $100
- Replacement > $100

Risk

- Multiple prior claims
- Suspicious evidence
- Potential abuse

Operational

- Same SKU generates 5+ complaints/month
- Same supplier generates repeated issues

Phase 7: Reporting & KPIs

Weekly Review

Review:

- Number of claims
- Resolution time
- Refund cost
- Replacement cost

Monthly Dashboard

Track:
Customer Metrics

- CSAT
- Resolution Time
- First Response Time

Operational Metrics

- Wrong Item Claims
- Claims per 1,000 Orders
- Top Problem SKUs
- Top Problem Suppliers

Financial Metrics

- Refund Cost
- Replacement Cost
- Shipping Cost
- Return Label Cost

Phase 8: Automation Opportunities

Auto-Tag Tickets

Trigger:

If subject contains:

- wrong item
- received incorrect item
- wrong product

Automatically apply:

- wrong-item

Auto-Send Evidence Request

When tagged:

- wrong-item

Automatically send:

Please reply with:

- Photo of item received
- Photo of shipping label
- Photo of packing slip
- Order number

Auto-Create Ops Alerts

Create a recurring report:

Alert when:

- SKU receives 5+ claims in 30 days
- Supplier receives 3+ claims in 30 days
- Wrong-item rate exceeds threshold

Recommended threshold:

0.5% of fulfilled orders

Phase 9: FAQ Implementation

Create the following Help Center articles:

1. I Received the Wrong Item
2. Do I Need to Return the Incorrect Item?
3. How Long Do Replacements Take?
4. Why Do You Request Photos?
5. What Happens if My Item Is Out of Stock?
6. International Replacement Orders
7. Wrong Size or Wrong Color Received

Link these articles in all support macros.

Recommended Launch Plan

Week 1

- Create tags
- Create ticket fields
- Create macros
- Create Shopify order tags

Week 2

- Train agents
- Implement resolution matrix
- Implement escalation rules

Week 3

- Launch reporting dashboard
- Start root-cause tracking

Week 4

- Launch FAQ articles
- Add automations
- Begin monthly quality reviews

Success Criteria After 90 Days

- ≥90% of wrong-item claims resolved within 2 business days
- Root cause captured on 100% of tickets
- Wrong-item rate tracked monthly
- Automated evidence collection implemented
- Recurring SKU and supplier issues identified within 30 days
- Reduction in replacement and refund costs through better operational visibility and prevention measures.



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