

# Processing Refund Requests

Agent Knowledge Base | Last Updated: October 10, 2025 | Owner: Customer Success Team

### 🔗 Quick Reference

- **Standard processing time:** 5-10 business days
- **Refund window:** 30 days from purchase date
- **Approval required:** Refunds over \$500 or older than 30 days
- **Tools needed:** Admin Dashboard, Stripe Portal, Salesforce

## Overview

This guide covers the complete refund process, from initial customer request to final confirmation. All agents can process standard refunds, but should escalate to a supervisor for exceptions or amounts over \$500.

## Eligibility Criteria

| Scenario                                | Eligible for Refund? | Action Required                              |
|---|----------------------|--|
| Purchase within 30 days, unused product | ✔ Yes                | Process immediately                          |
| Purchase 31-60 days ago                 | ⚠ Maybe              | Escalate to supervisor                       |
| Purchase over 60 days ago               | ✖ No                 | Offer account credit instead                 |
| Digital product, already accessed       | ⚠ Case-by-case       | Review usage data and escalate if needed     |
| Subscription (active)                   | ✔ Yes (prorated)     | Cancel subscription and refund unused time   |
| Fraudulent charge reported              | ✔ Yes                | Immediate refund and flag account for review |

**Policy Note:** We make exceptions for extraordinary circumstances (e.g., serious illness, death in family, natural disaster). Always escalate these cases to your supervisor with full context.

## Step-by-Step Refund Process

### 1 Verify Customer Identity

Before you process a refund, confirm you're speaking with the account holder in one of the following ways:

- Ask for the email address associated with the account
- Verify the last 4 digits of the payment method used
- Confirm the order number or transaction ID

**Security Alert:** Never process refunds to a different payment method than the original purchase. This is a common fraud tactic.

## 2 Locate the Transaction

In the admin dashboard:

1. Navigate to **Customers > Search**
2. Enter the customer's email address
3. Click on their account **Profile**
4. Select the **Orders** tab
5. Find the transaction by order number or date

**Important:** If the transaction doesn't appear, check if it was processed through a third-party platform (Apple App Store or Google Play). These require a different refund process.

## 3 Confirm Eligibility

Check the following before proceeding:

- ✓ The purchase date is within 30 days
- ✓ There have been no previous refunds on this account in the last 6 months
- ✓ Amount is under \$500 (if over that amount, escalate)
- ✓ The product hasn't been extensively used (check usage logs)

## 4 Process the Refund

In the admin dashboard:

1. Find the order
2. Click the **Actions** dropdown > select **Issue refund**
3. Choose refund type:
  - **Full refund:** Returns entire amount
  - **Partial refund:** Returns specified amount (requires supervisor approval)
4. Click reason code dropdown > Choose reason:
  - Customer request
  - Product defect
  - Billing error

- Duplicate charge
- Other (requires explanation)

5. In **Notes** section, add internal notes explaining the refund reason
6. At bottom, click **Process refund** button
7. Copy the refund confirmation number

## 5 Update Salesforce

Log the interaction in Salesforce:

1. Find the customer's Salesforce record using their ID, or create a new case if one doesn't appear
2. Set case type to `Refund - Processed`
3. Add the refund confirmation number
4. In the **Notes** section, include a brief summary of customer's reason
5. Set case status to `Resolved`

## 6 Communicate with Customer

Send confirmation using the appropriate canned response:

### *CANNED RESPONSE: REFUND\_CONFIRMATION*

*Hi [Customer Name],*

*Thank you for contacting the Customer Support Team. I hope you're doing well.*

*I see you reached out about your [ISSUE NAME] with [ORDER NUMBER]. I'm sure that must have been frustrating. I've processed your refund of \$[AMOUNT].*

#### **Next steps:**

- Refunds typically appear in 5-10 business days
- You'll see it as a credit to the original payment method ending in [LAST 4 DIGITS]
- Your refund confirmation number is: [CONFIRMATION NUMBER]

*If you don't see the refund after 10 business days, please contact your bank directly, as processing times can vary by financial institution.*

*Thank you for your patience!*

*Best regards,*

*[Your Name]*

*Customer Support Team*

## Special Scenarios

### Subscription Refunds

For active subscriptions:

1. Calculate prorated refund amount (unused days divided by total days, then multiplied by subscription cost)
2. Cancel the subscription in the system
3. Process the refund for a prorated amount
4. Confirm whether the cancellation takes effect immediately or at the end of the period (customer's choice)

### Third-Party Platform Purchases

For purchases through Apple App Store or Google Play:

**Best Practice:** We cannot process refunds for third-party purchases. Direct customers to the platform's refund process and provide them with our support if needed after their platform refund is approved.

#### *CANNED RESPONSE: THIRD\_PARTY\_REFUND*

*Hi [Customer Name],*

*Thank you for contacting the Customer Support Team. I hope you're doing well.*

*I see you reached out about your [ISSUE NAME] with [ORDER NUMBER]. I'm sure that must have been frustrating.*

*I see your purchase was made through [Apple App Store / Google Play]. Since the transaction was processed by [Apple / Google], refund requests must be submitted directly to them.*

#### ***Here's how to request a refund:***

##### ***Apple App Store:***

1. Visit [reportaproblem.apple.com](https://reportaproblem.apple.com)
2. Sign in with your Apple ID
3. Find your purchase and select "Request a refund"

##### ***Google Play:***

1. Visit [play.google.com/store/account](https://play.google.com/store/account)
2. Find your purchase and click "Request a refund"

*Once they process your refund, please reach out if you need any help with your account.*

*Thank you for your patience!*

*Best regards,*

*[Your Name]*

*Customer Support Team*

### Fraudulent Charges

**Important:** If a customer reports unauthorized charges, process the refund immediately and escalate to the Security Team by opening a JIRA ticket within 15 minutes.

1. Issue full refund immediately
2. Flag account for fraud review
3. Post details in the JIRA ticket: account email, transaction ID, amount, Priority Level 0 (most urgent)
4. Follow up with the customer using the FRAUD\_REFUND canned response

## When to Escalate

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### ⚠ Escalate to Supervisor When:

- Refund amount exceeds \$500
- Purchase is 31-60 days old
- Customer has received 2 or more refunds in the last 6 months
- Customer is requesting a partial refund
- Customer has threatened legal action or a chargeback
- You're unsure about policy interpretation
- Customer is requesting refund to a different payment method than originally used

### How to escalate:

1. Tag your supervisor in the JIRA ticket
2. Post in #support-escalations Slack channel and tag your supervisor there with JIRA link
3. Tell the customer: "I need to review this with my supervisor to ensure I'm providing the best solution. Can I follow up with you within 2 hours?"

## Common Customer Questions

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### "Why does it take 5-10 days?"

**Response:** "We process refunds immediately on our end, but your bank or card issuer needs time to post the credit to your account. Most customers see refunds in 5 to 7 business days, though it can occasionally take up to 10 depending on your financial institution."

### "Can you refund to a different card?"

**Response:** "For security reasons, we can only refund to the original payment method. This protects both you and us from fraud. If that card is no longer active, the refund will still process and your bank will redirect it appropriately."

### "Can I get store credit instead?"

**Response:** "Absolutely! Store credit is applied instantly. Would you prefer a \$[AMOUNT] credit to your account instead of waiting for the refund?"

## Reporting & Metrics

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Refunds impact our team metrics. All agents should:

- Keep refund rate under 5% of total transactions
- Maintain accurate reason codes for trend analysis
- Document customer feedback about why they're requesting refunds

**Best Practice:** If you notice multiple refund requests for the same reason (e.g., "feature didn't work as expected"), open a JIRA ticket so the team can address underlying issues.

## Quick Links

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- [Admin Dashboard](#)
- [Salesforce Customer Records](#)
- [Stripe Payment Portal](#)
- [JIRA Ticketing Homepage](#)
- [Refund Policy \(Customer-Facing\)](#)
- [#support-escalations Slack Channel](#)
- [Related: Processing Chargebacks](#)
- [Related: Account Credit Procedures](#)

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**Questions about this process?** Contact the Knowledge Management Team at [kb-feedback@Company.com](mailto:kb-feedback@Company.com)