

Returns & Refunds Playbook

Version 1.0 - CX Operations - July 2026

Synthetic portfolio sample. No client data.

1 Purpose and service principles

This playbook gives frontline teams a repeatable method for resolving returns, refunds, replacements and exceptions.

Make the next step obvious. Match remedy to evidence. Protect unit economics. Document once.

Scope: direct-to-consumer orders only. Marketplace, wholesale, regulated items, chargebacks and legal claims need another route.

2 Eligibility decision matrix

Unused and resalable - yes - 30 days - order ID - approve return.

Opened but resalable - usually - 30 days - condition note - approve if safe to return to stock.

Used or consumed - no unless quality or safety exception.

Wrong damaged defective - yes - replacement or refund.

Final sale - exception only with lead authorization.

3 Standard workflow

1 identify order and requester 2 classify request and condition 3 apply matrix 4 choose remedy 5 confirm timing and document outcome.

Confirmation template: I have approved your remedy. The next update will be event by date. Your reference is ID.

4 Refund pathways and service levels

Original payment refund submit within one day; bank posting typically three to five business days.

Store credit available immediately. Replacement released in one business day. Carrier claim opened within two business days.

Authority: agent up to \$75, lead \$75 to \$250, manager above \$250, specialist for safety or legal risk.

5 Exceptions and escalation

Safety, privacy, account takeover, legal, regulator, fraud, repeated-refund, and authority-limit triggers require escalation.

Escalation packet includes facts, policy position, recommendation, and exact decision needed.

6 Quality control and approvals

Before close verify identity, reason, eligibility, amount, authority, next event, and order timeline.

Weekly sample review, monthly operating review, quarterly policy review.