Handling a refund request

Fictional sample · New-agent training, 45 minutes

Customer Support Onboarding · Module 3 of 6

By the end of this session you can

1. Decide whether a refund request is eligible under the 30-day policy
2. Issue an eligible refund in the support tool with the correct reason code
3. Explain an ineligible decision and offer the allowed alternative

Why refunds deserve care

- A refund conversation is often the customer's last contact with us
- A clear, fast answer keeps trust, even when the answer is no
- Wrong refunds cost money and are hard to reverse
- Inconsistent answers lead to repeat contacts and escalations

The policy in three rules

Date, condition, payment method

Three rules, checked in order

1

1. Date

Requested within 30 days of delivery

2

2. Condition

Unopened, or opened but unused and complete

3

3. Payment

Refund goes to the original payment method

Eligibility quick check

RULE	CHECK IN THE ORDER RECORD	IF IT FAILS
1. Date	Days since delivery: 30 or fewer?	Not eligible: offer store credit
2. Condition	Unopened, or unused and complete?	Not eligible: offer store credit
3. Payment	Original method still available?	Refund to gift card balance
Damaged item	Damaged on arrival?	Use the damaged-item process

Hi, I ordered the desk lamp three weeks ago and never opened it. Can I get my money back? I paid by card.

—

Customer message, day 21 after delivery

Fictional example

Worked example: five steps in the tool

1. **Check date**
   Delivery date in the order record: day 21
2. **Check condition**
   Customer confirms unopened
3. **Select refund**
   Choose Refund on the order
4. **Reason code**
   Select "Unwanted, unopened"
5. **Confirm**
   Send the refund confirmation template

Worked example: the reply

Why it is eligible

- Day 21: within 30 days
- Unopened: condition rule met
- Card: refund goes back to the card

- Confirm the amount and the refund
- Say when it will appear
- Thank them; no extra upsell

Practice in pairs: 13 minutes

- Pair up. One person is the agent, one is the customer
- The customer reads a scenario card aloud
- The agent decides, explains the decision and names the next action
- The partner checks the decision against the quick check (slide 6)
- Swap roles for each card: A, B, then C

Scenario cards

CARD	DAY	ITEM	PAID BY	CUSTOMER ASKS
A	12	Opened, unused, complete	Card	Refund
B	34	Unopened	Gift card	Refund
C	5	Damaged on arrival	Card	Replacement

Knowledge check

Answer on your own, then we discuss

#	QUESTION
1	Day 29, item unopened. Eligible?
2	Day 31, item unopened. Eligible?
3	Reason code for an unwanted, unopened item?
4	Which payment method does a refund go back to?
5	Card C, damaged on arrival: is it a refund request?

Answer key

#	ANSWER
1	Yes: within 30 days and unopened
2	No: outside 30 days. Offer store credit
3	"Unwanted, unopened"
4	The original payment method
5	Not at first: damaged-item process, replacement first

Recap

- Check in order: date, condition, payment method
- Damaged on arrival goes to the damaged-item process
- Pick the reason code that matches the condition
- Explain a no clearly and offer store credit

Where to get help

Policy: Support knowledge base, Refunds section

Unsure about a case? Ask your team lead before you refund.