

Job Aid

Refund a customer's order

Filled-in example. The systems, document numbers, amounts, limits and dates are placeholders, chosen to show how much each layout should say.

Job aid number	JA-SUP-004	Version	1.2
Used by	Support agents	Related SOP	SOP-SUP-007, Handle refund requests
Owner	Support team lead	Last checked	2026-10-01
Where it lives	Linked from the help desk's Refund macro	Next review	2027-01-15

1. When to use this job aid

- **Task:** refund all or part of a paid order in the billing system.
- **Use it when:** a customer asks for their money back on an order, by ticket or chat.
- **Done when:** the order shows the refund and the customer has a reply with the amount.

2. Before you start

- The ticket is assigned to you and gives the order number.
- You are signed in to the billing system with the Refunds permission.
- You have read the decision table in section 5. Some refunds are not yours to make.

3. Steps

Step	Do this	You should see
1	Open the order from the order number in the ticket.	The customer's name and email match the ticket.
2	Find the customer's situation in the decision table in section 5.	You know whether you can make this refund yourself.
3	On the order, select Refund.	The refund form opens with the full amount filled in.
4	For a partial refund, replace the amount with the figure you agreed.	The amount matches the agreed figure, not the order total.
5	Choose the reason that matches the ticket.	A reason is selected. Other needs a short note.
6	Run the checklist in section 4, then select Issue refund and confirm.	The order shows Refund pending.
7	Reply with the amount and when it should arrive, using the Refund sent macro.	The reply is in the ticket's sent messages.

Step	Do this	You should see
8	Add the tag refund-issued and set the ticket to Solved.	The ticket shows Solved.

4. Checklist

Before you select Issue refund in step 6:

Done	Check	Notes
	The order number on the refund form matches the ticket.	
	The amount is the amount you agreed with the customer.	For a partial refund, it is not the order total.
	The refund goes back to the original payment method.	Never to a different card or account.
	You have approval, if the decision table asks for it.	Put the approver's name in an internal note.
	The reason matches what the customer asked for.	

5. Decision table

Read from the top and use the first row that matches.

If	Then	Ask
The customer says they did not place the order	Stop. Do not refund. Report it as possible fraud.	Payments team, through the fraud form
The order already shows Refund pending or a completed refund	Do not refund again. Tell the customer the date of the first refund.	No one
The order was paid more than 30 days ago	Do not refund. Offer the options in SOP-SUP-007, section 4.	Support team lead, if the customer disputes it
The refund is more than \$100	Get approval before step 3 and note the approver's name on the ticket.	Support team lead
The refund is \$100 or less	Make the refund yourself with the steps in section 3.	No one
Anything this table does not cover	Stop and ask before you refund.	Support team lead

6. Help and changes

- **Ask for help:** the support team lead, in the team's support channel.
- **Found a mistake in this job aid?** Post the step number in the same channel, so the owner can fix it.

Version	Date	What changed	Changed by
1.0	2026-02-10	First version	Support team lead
1.1	2026-05-04	Added the already-refunded row after two orders were refunded twice	Support team lead
1.2	2026-09-22	Steps 3 and 6 rewritten for the new refund form	Support team lead

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