



Working guide

Shopify Guide: Orders and Customer Support

From payment to problem resolution: verifiable steps for your store, warehouse and support team.

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Edition October 2026 · English

ifgdigital.com

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How to use this guide

An order can show as paid while the parcel is still on the packing table. A label can have a tracking number even though the carrier has collected nothing. A refund can go out while the product is still on its way back to the warehouse. Many support errors start when these situations are described as if they were the same thing.

This guide organizes the work of store, warehouse and support around steps you can verify. Use it to build a procedure, handle exceptions and find where your flow gets stuck. The examples are for teaching: set timings, approval thresholds and customer promises according to how you actually operate. For returns, tax and customer communications, the rules of the market you serve also apply, and an app's settings do not replace them. This guide is not legal advice.

1. Read an order on several levels

Before acting, separate four questions. Is the order open? What is the payment status? Which items have been fulfilled? Is there a return? Shopify keeps these as distinct statuses: the order status (open, archived, canceled), the payment status (for example pending, authorized, paid, refunded), the fulfillment status and the return status. Archiving is not the same as canceling or refunding, and fulfillment does not prove the recipient has received anything.

Aspect	What to check	Mistake to avoid
Payment	Transaction, amount, status, any expiry	Preparing an order as paid when it is only authorized
Preparation	Lines, quantities, location, any holds	Shipping a line that was changed or put on hold
Transport	Parcel, tracking, carrier acceptance, updates	Saying «shipped» just because a label was created
Resolution	Request, decision, return, refund, restock	Treating everything as closed after one click

This table is a way of reading an order, not a list of native statuses. In your notes, use your store's own labels and add the observed fact: «label created, pickup not yet recorded» is more useful than «in progress».

Start the day with the exceptions: orders close to their fulfillment promise, payments to check, incomplete addresses and problem deliveries. If you only open the newest orders, the difficult ones keep aging.

2. Decide who can unblock each step

Even in a small business, assign three responsibilities: commercial check and payment; preparation and handover to the carrier; communication and closing requests. One person can hold several roles, but must know which one they are acting in and what evidence it takes.

Write a short matrix: who can correct data, who can change amounts, who approves an exception and who issues the refund. Set internal thresholds that match the financial risk. A second check on a large refund is an organizational decision, not a platform requirement.

A tag such as «check address» helps you find an order, but it does not necessarily stop the warehouse or an external service. When you need to pause an order, use a real hold in the supported fulfillment system and tell whoever prepares orders. The step is closed when the person who must pause has received the notice and the order cannot leave by mistake.

Responsibility sheet. Activity ... / owner ... / backup ... / decision authority ... / system to update ... / proof of handover

3. Receive the order and check payment

Check lines, quantities, required contact details, delivery method and notes. Tell an online order apart from one created from a draft or a business process: an order number does not prove it has been paid.

With manual capture, an authorized payment must be captured before the provider's deadline. Capture moves the payment to paid; the money reaching your bank account is a different event. Check the deadline of each transaction, because the number of days is not the same for every payment method.

For a draft order, the payment link lets the customer pay through checkout. Use «Mark as paid» only when the money has already been received by the method you record; it does not charge anyone. An order with payment terms can exist with an amount still due.

When a risk signal appears

Review the indicators and the recommendation on the order page before fulfilling. Fraud indicators are available from the Basic plan; recommendations need the Grow plan or higher, or Shopify Payments. Some orders get no recommendation, for example test, free, gift-card, POS, B2B and subscription renewal orders. The analysis usually finishes immediately but can take a few minutes, so wait before fulfilling. A favorable assessment or a confirmed email address does not rule out a chargeback.

A billing address that differs from the shipping address can be perfectly normal, for example for a gift, so don't treat it as a verdict on its own. Ask relevant questions through a channel linked to the order and apply a documented criterion. Never collect full card numbers, CVV codes or unnecessary documents in chat. If a decisive check is missing, keep the hold, assign an owner and set a date to review the case.

4. Send the order to the right warehouse

Shipping profiles govern rates and shipping conditions for products. Order routing, by contrast, chooses the fulfillment location and requires at least two active locations. The default strategy checks, in order, whether a single location can fulfill every item, whether the location is in the destination market, and which location is closest to the customer. Creating a profile does not by itself send Northern orders to Milan and Southern orders to Naples: that takes configured routing rules.

For your own flow, describe what happens when one location cannot supply the whole order: transfer, an agreed wait, or split shipments. Weigh cost, customer promise and product constraints. A kit meant to be used together should not be split just because the system allows it.

Before sealing the box, compare SKU, variant and quantity with the current order. Check condition, included accessories and packaging. If a change arrives during preparation, stop and re-read the order: a sheet printed before the change may now be wrong.

A quality check must produce an outcome and an action, for example «component missing, order on hold, check with ...». A bare «QC» tag does not say whether the check is still to do or already passed. Choose distinct names and make sure the physical flow follows them.

5. Record what leaves and follow what travels

For each shipment, keep the link between items, quantities and tracking. In a partial delivery, the message must say what ships now and what remains, so the customer does not have to work it out by comparing two generic emails.

Creating a label is preparation; the carrier accepting the parcel is another event. Use the scan or other operational evidence you have to establish when the parcel was handed over. If tracking does not update, tell apart a missed pickup, a delayed scan and a problem in transit: each needs a different action.

Set your checks according to the promise made and the service purchased. An express order may need attention before a standard one, so a fixed rule such as «check after 72 hours» doesn't fit every case. In your exceptions log, write the order, the last verified fact, the next action and the next update to the customer.

For digital products, the expected result is access to or delivery of the content, depending on the service you use. Test the link with a test account and document how to handle wrong access or revocations. Carrier tracking is not a relevant metric for these orders.

6. Organize support without losing context

Shopify Inbox handles your store's chat. Current settings separate conversations with your staff from an optional Inbox agent, which answers questions about products, shipping, returns, sizing and policies using your catalog, Knowledge Base and published content. If you turn it on, check its sources, its answers and the handover to a person, and don't assume an automated message resolved the request.

Set opening hours and the first message according to when your staff is really available. When the visitor's email is in the conversation, you can continue after they leave. Whether to require sign-in is a trade-off between verification and friction.

When a request arrives, identify the problem before asking for data. A question about a product's measurements doesn't need an order number. To change an address or share confidential information, check that the person is authorized to act on that order.

Keep notes in a simple structure: customer request; verified fact; action taken; what is still pending; next contact. A note like «spoke to customer» doesn't let a colleague carry on. If you work across several channels, choose one place to store the outcome, and don't assume Inbox syncs with outside tools.

7. Handle changes without promising them in advance

An address-change request starts with a progress check. If the order can still be edited, coordinate the correction with the warehouse and integrations, update any label and re-read every affected field. Confirm to the customer only after you have the answer. If the parcel has already been handed over, check the carrier's options without guaranteeing an intervention you don't control.

Editing an order has limits. You can't remove fulfilled lines or change their quantity. Shipping rates and methods are not recalculated, so if weight or size grows you may need to add a custom shipping charge. Local delivery orders can't be edited, orders imported from apps can only be edited by the app that created them, and some apps don't recognize edits (a fulfillment service might still ship a line you removed). Check amounts, the balance to collect or refund, and synchronization with the logistics service.

Example: an accessory swapped before dispatch. The customer paid €80 and asks for a different accessory, bringing the total to €86. The warehouse confirms the parcel has not left. You check compatibility and whether the order can be edited, record the swap and check the €6 balance. The edit alone does not prove the €6 was collected.

Before releasing the order for preparation, follow the agreed process for the balance, check that the warehouse sees the new line, and replace any documents or labels that are now wrong.

Closing an edit. The updated order, the payment status and the warehouse's operational confirmation. If one of the three is missing, the case stays open.

8. Returns, refunds and restocking are separate decisions

A return concerns the product coming back, a refund concerns the money, and restocking makes the quantity available again. Shopify handles them as separate flows. You can refund an order without creating a return, but once you have issued a refund you can't create a return, and a refund without a return records no reason, so it won't appear in reports that group returns by reason. During a refund the restock option is selected by default (only for items with tracked inventory). Don't put an item back on sale until you have checked it is available and fit to sell. A refund you have started in the admin can't be canceled.

When the request arrives, identify the items and quantities you need to process it. For a legal withdrawal the consumer doesn't have to give a reason: you may ask for one as optional feedback, but not make the right depend on it. Distinguish withdrawal, lack of conformity (a defective product) and a commercial return, then give instructions, destination and next step according to the rules that apply.

Online withdrawal: the mandatory function from 19 June 2026

Directive (EU) 2023/2673 added Article 11a to Directive 2011/83/EU, which Italy transposed as Article 54-bis of the Consumer Code (Legislative Decree 209/2025, in force since 23 January 2026). From 19 June 2026, a trader who concludes distance contracts with consumers through an online interface must offer a withdrawal function. An email address to write to or a PDF form to send back is no longer enough on its own. The required elements are:

- a function labeled «recedere dal contratto qui» (in the Italian text) or an equally unambiguous wording, clearly visible and easy to reach throughout the withdrawal period;
- an online declaration in which the consumer provides or confirms their name, the details identifying the contract and the electronic means for receiving the confirmation;
- a second function, labeled «conferma recesso» or equivalent, to submit the declaration;
- an acknowledgement of receipt on a durable medium, sent without undue delay, stating the content of the declaration and the date and time it was sent;
- the withdrawal counts as made in time if the online declaration is sent before the period ends.

This does not replace return handling. The function collects the declaration; return instructions, receipt of the goods and the refund still follow. A returns form or a Shopify self-service portal, where customers can request returns and cancellations from the order status page, does not automatically meet the withdrawal-function requirements: it depends on how it is configured. I could not find an official page in the Shopify Help Center on the withdrawal function, so check with your adviser and with your theme or app provider how you will implement it, and test the whole path end to end, including for guest checkouts. Exemptions and special cases (for example made-to-order goods or certain digital content) follow the general withdrawal rules.

Check. Function visible on every relevant page and reachable without an account / labels correct / two-step confirmation / acknowledgement email with date and time / log of declarations / who handles the request and by when

Refund and restocking

For withdrawals under the Italian Consumer Code, the refund is due within 14 days of the notification. For goods, unless you offered to collect them, you may hold the refund until you receive the goods or until the consumer proves they have sent them back, whichever happens first. A later internal inspection does not let you postpone this deadline automatically.

When goods come back, separate resalable, damaged and to-be-examined items. Record the outcome before updating stock. For an exchange, also check the replacement is available and any price difference. For digital content, look at access and the specific conditions: having no physical item does not settle the request on its own.

Tell the customer a refund is done only once the transaction is confirmed. Distinguish the moment you send the refund from the moment the customer sees it in their account, and use the provider's verified information for timings. If the customer no longer has access to the original payment method, they must contact their bank or provider.

9. Adapt the flow to pickup, local delivery and gifts

For in-store pickup, «ready» and «collected» are two events. Prepare the product, give real location and instructions, then record the pickup when it happens. Set a proportionate check, with the order number and a procedure for someone collecting on the customer's behalf, without asking for documents indiscriminately.

For local delivery, consider area, capacity, cost and who to contact if nobody is home. If you promise a time slot, check that your system and your team really handle it: not every setup books slots or routes automatically.

For a gift, separate the payer from the recipient. Keep communications and required documents correct without revealing buyer details the recipient doesn't need. A request not to show the price in the parcel is handled in the packing flow, without removing mandatory documents.

10. Short replies, but only after checking

The templates below are drafts to adapt. Fill in the fields, delete anything you haven't verified and pick the right recipient. A template does not authorize a change, a refund or sending a message.

Address change still being checked. «Hi ..., I've received your request for order I'm checking with the warehouse whether we can update the address before dispatch. I'll confirm the outcome by For now the change is not confirmed.»

Address change completed. «Hi ..., the address on order ... has been updated and the warehouse has received the correction. The updated summary is available in Effect on delivery times, if verified:»

Partial shipment. «Hi ..., ... (items and quantities) have been handed to the carrier. Tracking is Still to ship: ...; verified status and next update: Cost of the second shipment, if relevant and confirmed:»

Delay with no reliable date. «Hi ..., tracking for order ... hasn't updated since We've opened an inquiry (reference, if available: ...). We don't yet have a confirmed new date. We'll update you by ..., even if the inquiry is still open.»

Instructions for an accepted return. «Hi ..., we've accepted your request for ... (items and quantities). To proceed, ... Verified details on label and costs: Once ..., we'll let you know»

Refund issued. «Hi ..., on ... we issued a refund of ... (amount and currency) to ... (method) for order The reference is When the credit appears depends on your provider. Timings, only if verified:»

11. Measure times and backlogs with usable definitions

Choose a few indicators that lead to a decision. For each one, state the start point, end point, orders included, calendar and owner. A first-response time in working hours must not be compared with one in calendar hours, and an automatic acknowledgement is not a useful human reply.

Indicator	Proposed working definition	Possible decision
Preparation time	Payment captured → actual handover to the carrier, for comparable orders	Review shifts, stock or promise
Backlog	Orders still to process, split by age and deadline	Prioritize at-risk cases
First useful reply	Request → first reply that addresses the problem	Change staff coverage
Orders with contact	Orders with at least one request ÷ orders in the cohort	Improve information and process

Pair the median with a high percentile, for example the 90th, to see the slow cases; check how your software calculates it, especially on small samples. For returns, use cohorts that are mature enough: yesterday's orders have not had as long as last month's to generate a request.

The order export has fields such as «Paid at» (the date the payment was captured) and «Fulfilled at» (the date fulfillment was completed), which is not necessarily when the carrier physically took the parcel. Orders with several line items take several rows in the file, with most order-level fields blank after the first row, so don't count those rows as separate orders. To measure partial shipments or real handover you need consistent shipping and carrier data.

Before sharing a spreadsheet, remove personal data you don't need for the analysis and restrict access. For the missing-tracking rate, include only shipments where tracking is expected, excluding pickup and digital delivery.

12. Handle peaks and incidents with a practical plan

Suppose 60 orders arrive each day and the team closes 45. The backlog grows by 15 a day, before exceptions or catch-up. A new automatic email doesn't close that gap: you have to add capacity, reduce rework, or openly revise the promise for new orders.

If a carrier stops, assign a coordinator, identify the affected orders and separate those not yet dispatched from those already in transit. Communicate verified facts, available options and the next update. Don't invent a date just to close the ticket quickly.

Prepare cover for essential tasks: who reads blocked orders if the usual person is away, who can approve an exception, where the latest status lives. After an incident, record cause, impact, fix and prevention, so the next colleague doesn't start from zero.

13. Turn the method into a procedure you can maintain

Write the procedure with the detail a new person needs: how work comes in, the check, the decision, the system updates and the exit. It can fit on one page or take several; what matters is that the important exceptions are clear.

In training, have the person follow three cases: an ordinary order, an order on hold, and a return with a refund. Ask them to explain what they know, what is missing and which step they can carry out. Judge the result in the systems, not whether they can recall menu names.

Improvement log. Problem observed ... / evidence ... / cause to verify ... / proposed change ... / owner ... / date ... / result after the change

Procedure ready. Roles are assigned, the main cases are repeatable, an order on hold can't ship by accident, and every customer promise matches a fact or a commitment under control. Review it when your warehouse, apps, payments, rates, commercial terms or withdrawal rules change.

Sources

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