

Processing Subscription Cancellations in Recharge on Shopify

Department: [Customer Service]

Date: [July 11, 2024]

Purpose/Goal

To establish a clear, consistent, and efficient process for handling subscription cancellations within the Recharge app on Shopify. This aims to ensure that all cancellations are processed accurately, promptly, and in compliance with company policies, thereby enhancing customer satisfaction and maintaining operational integrity.

Resources Needed

- Shopify admin Account
 - Recharge Account
- CSR tracker

Knowledge Base

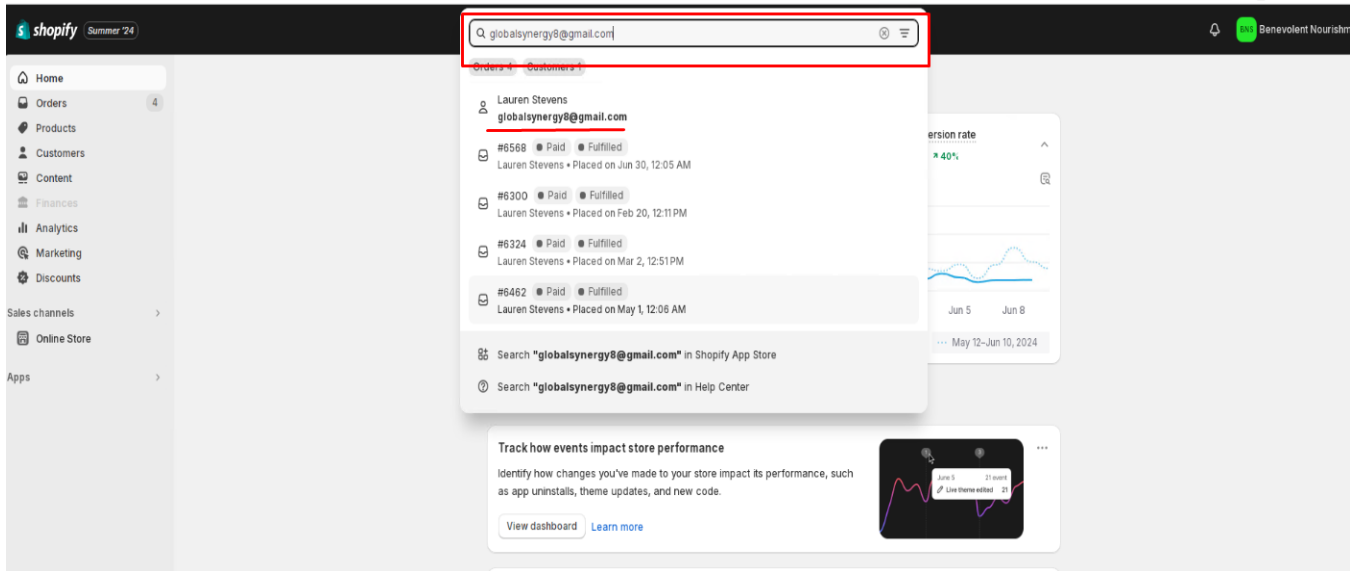
Attach Loom Video of SOP Being Done

- [Video]

Overview of Steps

Step 1 - Log into Shopify Admin:

- Access the Shopify Admin dashboard using your credentials.
- From the Home Page, go to Search bar and search customer's email address
Use the search bar to find the specific order by entering the order number or the customer's name.
- Click on the customer's name or account to open the order details page with the subscription.

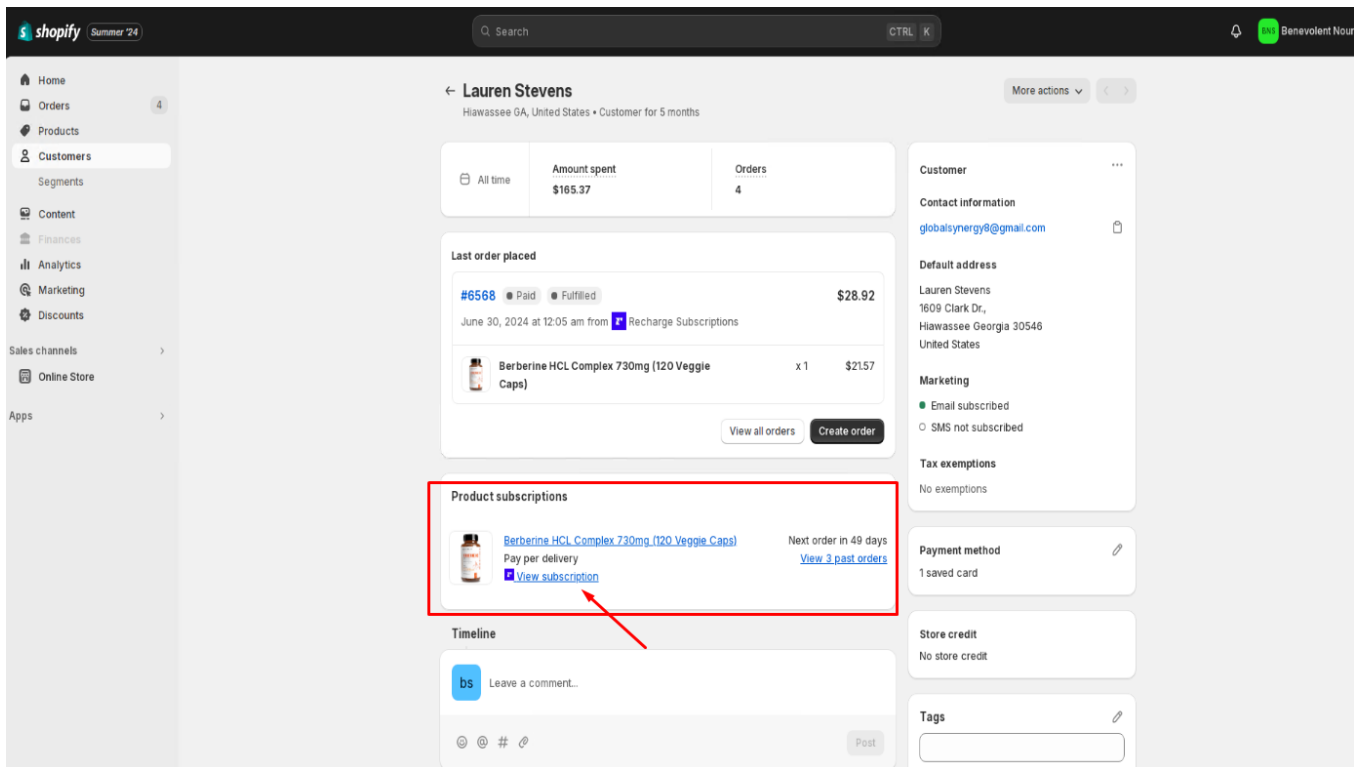


Step 2 - Locate the Customer's Subscription:

- Check the product description section

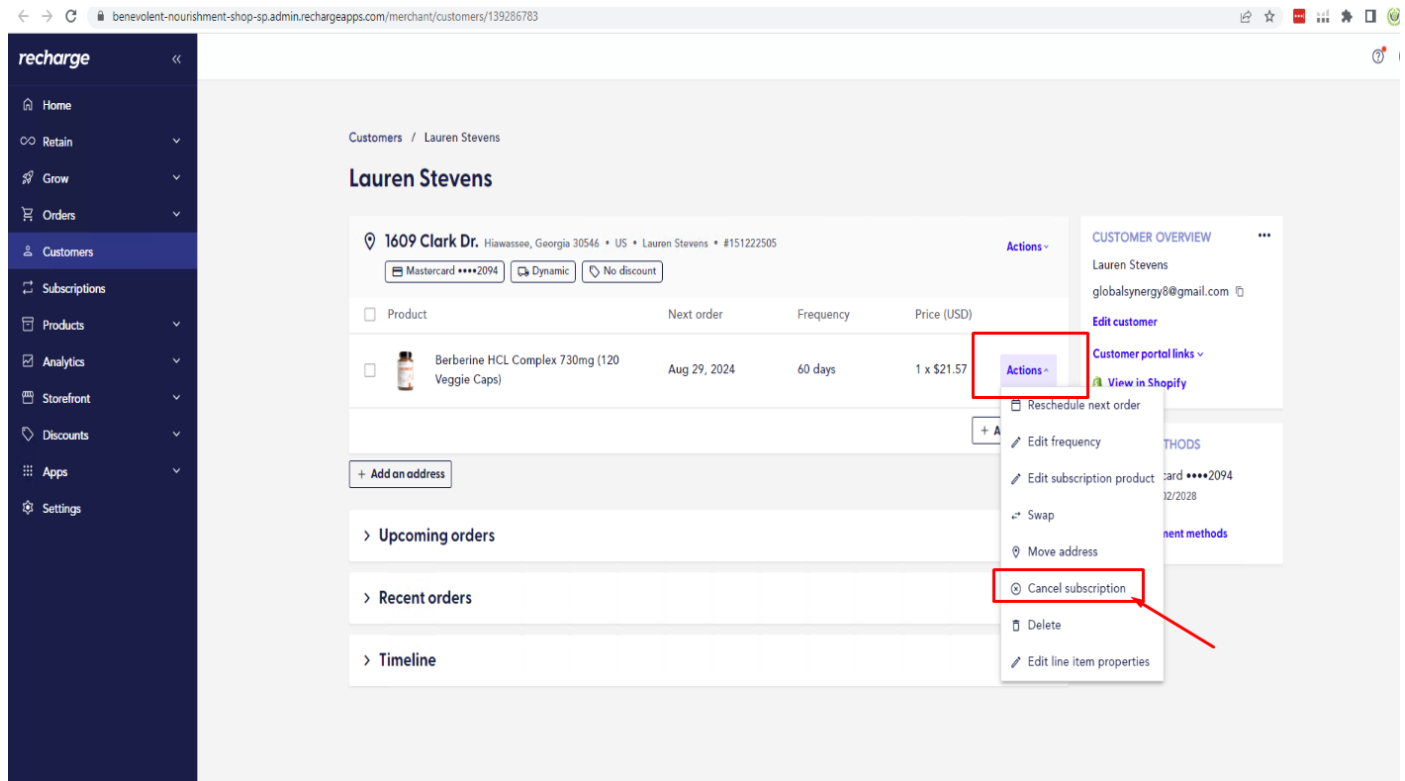
Noting: Make sure to click on the correct product if there are multiple descriptions

- Click on the "View Subscriptions" hyperlink to make sure to be routed to the correct product subscription that the customer wants to cancel in the **Recharge** app.



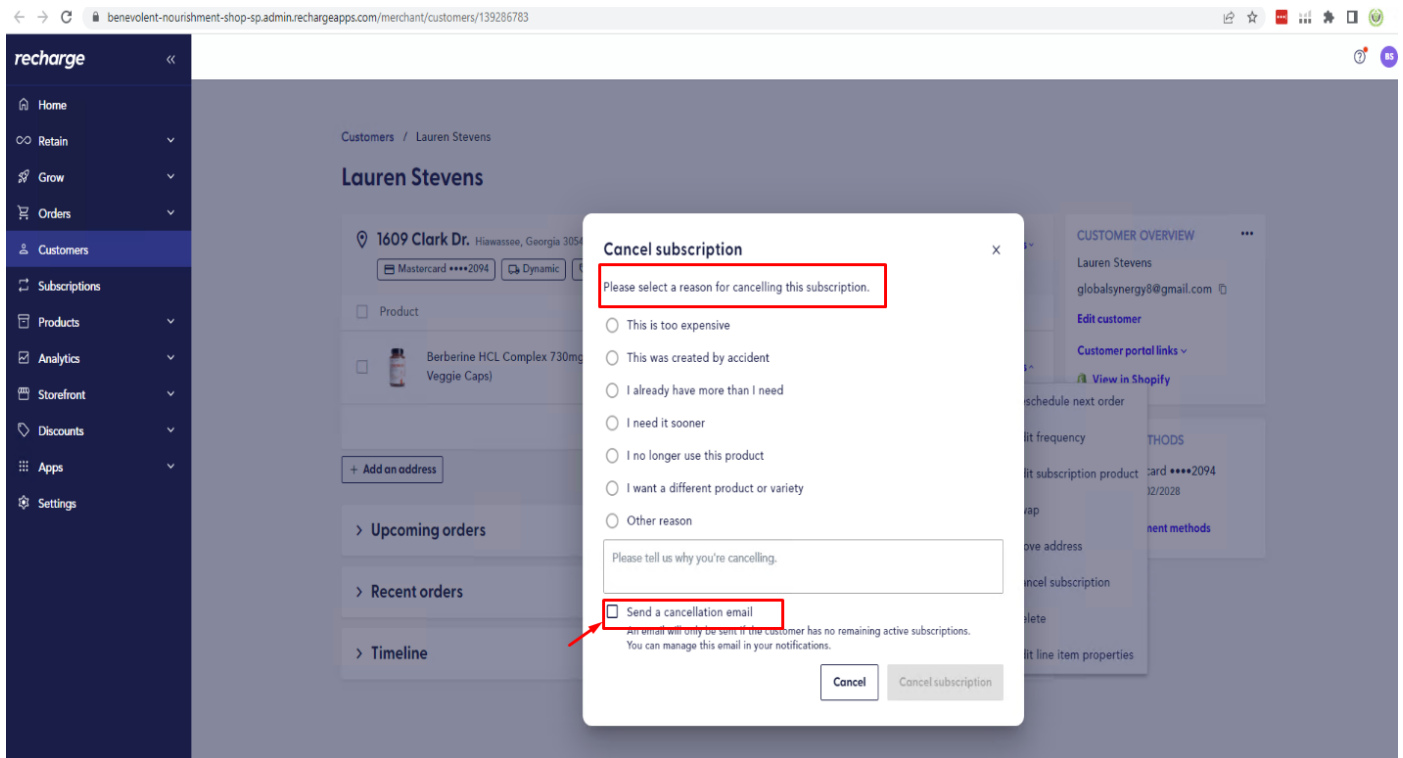
Step 3 - Initiate the Cancellation:

- On the subscription details page, click on **Actions**.
- Select **Cancel Subscription** from the dropdown menu.
- A dialog box will appear asking for confirmation. Confirm the cancellation by clicking **Cancel Subscription** again.



Step 4 - Provide Cancellation Reason:

- Select a reason for the cancellation from the dropdown menu (recommended for tracking purposes).
- Add any additional notes explaining the reason for the cancellation (optional).
- Tick the box to send confirmation email to the customer for the cancellation processed.



Step 5 - **Confirm the Cancellation:**

- Ensure that the subscription status is updated to **Cancelled**.
- Verify that no further charges will be made to the customer's account.
- Send a confirmation email to the customer acknowledging that their subscription has been cancelled.
- Include any relevant information about refunds (if applicable) and the effective date of the cancellation.

Once it is successfully processed, it will be grade-out and crashed out from the customer's account and shows no upcoming orders.

recharge<<

Home

Retain

Grow

Orders

Customers

Subscriptions

Products

Analytics

Storefront

Discounts

Apps

Settings

Subscriptions / Subscription #465878847

Subscription #465878847

Cancelled on July 9, 2024

lydia DeLaRocha • View all subscriptions for this customer

1616 Pine stNapa, California 94559 • US • lydia DeLaRocha • #152976723

Visa ****3370DynamicNo discount

Actions

Product	Next order	Frequency	Price (USD)	Actions
☐ Quercetin-with-Bromelain-Zinc-500mg(120-Veggie-Gaps)	Cancelled July 9, 2024 Other reason	60 days	1 x \$23.82	Actions

Upcoming orders

There are no upcoming orders. II

Recent orders

> May 17, 2024

#6487

#735631633

\$31.17

Success

> Mar 18, 2024

Checkout

#6363

#700944176

\$31.17

Success

CUSTOMER

lydia DeLaRocha

lydiasplace1@gmail.com

View in Shopify

SHIPPING ADDRESS (ID #152976723)

lydia DeLaRocha

1616 Pine st

Napa, CA 94559

United States

Move address

Edit address

PAYMENT METHOD

Visa ****3370

Expires 09/2027

Update payment method

SUBSCRIPTION ID

#465878847

Quality Control

- If additional information is needed, contact the customer to confirm their request to cancel the subscription and gather any necessary details.
- Ensure that the request to cancel the subscription is valid and authorized by the customer.
- Maintain accurate records of the cancellation transaction, including the reason for cancellation and any supporting documentation.
- Verify that no further charges will be made to the customer’s account following the cancellation.

Revision History

Date	Version	Description	Approved
07-11-2024	1.0.0	Initial document and draft created	Cherry