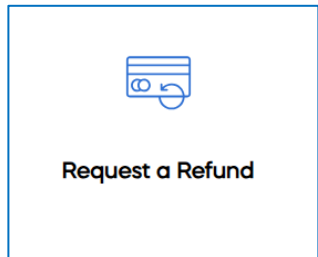


Refunds made easy

What is refund self-service?

Refund Self-Service enables customers to quickly and independently request refunds through our Help Center—without needing to contact support in the majority of cases. This streamlines processes, reduces support workload, and improves customer satisfaction by drastically reducing the time customers need to wait for a refund of their order.



Which criteria can be used?

You can customize the refund eligibility rules based on your business needs, including:

- Refund window: numbers of days after purchase during which refunds are allowed
- Maximum order value: set a threshold for eligible refunds
- Product exclusions: Specify product IDs that are not eligible for self-service refunds
- Countries to be excluded / different set-up based on geographic location

Which refund requests are eligible?

Refund eligibility may differ depending on the specific refund policy applied for the product purchased, the purchase date, and what payment method the customer chose.

Which payment methods are supported?

Refund self-service is available for the following major online payment methods:

- Credit cards
- PayPal
- Apple Pay
- Alipay
- Direct Debit
- Amazon Pay



What happens if the refund request is not eligible?



If a refund request does not meet the defined criteria or uses an unsupported payment method, the customer will be guided to the appropriate support channel.

If the payment method is not supported for self-service (typically offline or non-standard payment methods), the customer will be asked to contact Cleverbridge Customer Support to ensure proper validation and processing.

If the refund request falls outside the defined criteria (e.g., outside the refund timeframe), customers can be redirected to your customer support team for further handling. Alternatively, the default set-up can be changed so that the customer is referred to Cleverbridge Customer Support.

Do you have an example?

Dobis makes great software and offers a 30-day money back guarantee on their website. Sarah has accidentally purchased the same Dobis product twice using her credit card and decides to request a refund for one of the orders. An hour later she goes to our website and fills in the refund request form. Since her request is within the first 30 days, she is eligible for a refund. Once she has filled in the form, she will just need to validate the refund request using the link in the email we sent her. Once the refund has been confirmed, she will then receive an email confirmation within 24 hours and the money will be back in her account within 5 to 7 business days.

How can I increase the number of refund requests that are processed using refund self-service?

We recommend linking directly to our refund self-service on your knowledge base/support page. Here is an example of how you could include this information in an article:

Within ___ days of your product download purchase, you may request a full refund, for any reason. You can easily use the self-service option to request a refund using the link [here](#). This self-service option allows you to get a refund quickly if all the requirements are met.

In July 2022, we asked one of our main partners to make this simple change to their help center article and since then the percentage of customers using refund automation has increased dramatically going...

From an average of 28.6% to 34.2%* with one small change.

*The mean percentage of customers who used the self-service option from Jan 2022 – Jun 2022 was 28.6%, and the mean percentage from July 2022 to December 2023 was 34.2%.

Why should we use refund self-service?

Using refund self-service makes sense as it can save you costs if these simple requests are automated. What's more by reducing the number of refund requests your support team has to handle, your team can focus on other types of requests such as technical support. This will increase your customer satisfaction



rates and turnaround time. What's more it can give you a clearer picture of why customers want a refund, since customers provide a reason for the refund.

Doesn't refund self-service increase the number of refunds?

To put it simply: no, we have not seen a significant increase in the refund rate since the self-service option was introduced in 2021. Since then, over 100,000 customers have been able to process their own refunds using the self-service option. Looking at the refund rates of some of our top partners, we can see that the refund rate has remained fairly stable. Making it easier for customers to get a refund means that you will increase customer satisfaction and reduce needless friction. Offering customers a clear route to technical support and being able to provide them with help more quickly will reduce the number of customers who file a chargeback or ask for a refund in the first place.

What next?

Feel free to reach out to your dedicated CSM for the next steps and any open questions. They will be able to guide you through all the necessary details to ensure that you are set up to use the self-service refund feature. If there are any additional requirements or adjustments that need to be addressed to use this option correctly, they will be happy to consult with you.