

# Step-by-step checklist for exploring Happy Returns' app in the demo environment

- GET A REFUND**
  - Click on an item to initiate its return.
  - Select a reason for the return. For this example, choose "Did Not Like" to see how a straight refund works.
  - Next, you can choose how you'd like to receive the refund. Click on "Original payment method" and then click "Continue" at the bottom of the screen to demonstrate that you're done choosing items.
  - Select a return method from the following three options: return to a Happy Returns Return Bar, return in store, or return by mail. For this example, choose "Return in store" — we'll explore the other two options later — and click "continue."
  - View the Return Preview on the final screen for a summary of your total refund amount, the return payment method, and next step instructions based on the return method selected.
  - After clicking "Submit Return," you'll be taken to the confirmation page, and a confirmation email would also be sent to the email address on file in a non-demo situation.
  
- RECEIVE STORE CREDIT**
  - To see what happens when a shopper asks for a refund in the form of store credit, follow the same steps above. At step 3, choose "Store Credit" instead of "Original payment method."

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**MAKE A ONE-CLICK EXCHANGE**

- Select a pair of shoes from the order list, and choose "Too Small" as the reason for returning. (Note: Only shoes are available for exchanges in this demo environment, but you can customize your own returns portal to make exchanges available for any item you want.)
- You'll see a message that says, "You are returning a 7.5" with an option to select "Send the next bigger size {8}."
- Select that option and you'll notice the exchange transaction is complete — hence the name "one-click exchange."
- The rest of the prompts are the same as they are for selecting a refund: choose a return method, view the "Return Preview" screen, and then "Submit your return."

**MAKE AN EXCHANGE FOR OTHER VARIANTS**

- Select a pair of shoes again and choose "Too Small" as the return reason.
- This time, instead of choosing the next bigger size, select "See Other Options."
- Here, you see you have the option to return the item for a refund or store credit, but you can also exchange for something similar.
- After selecting the option to exchange, you'll see that you can swap the shoes out for a different color or a different size.

**SEE YOUR RETURN POLICIES APPLIED**

- Wondering what it looks like when you make an item unavailable for return? Scroll through the order list inside the demo environment, and you'll notice that certain items are grayed out and unable to be clicked.
- In the bottom right corner of each grayed-out item you'll see a reason why it's ineligible for a return, including:
  - Previously returned
  - Past the return window
  - Final Sale
  - Contact customer service

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- MAKE A GIFT RETURN**
  - Gift recipients have the ability to return a gift with our software, without notifying the person who gave them the present.
  - On the first page of the demo environment, click "Start a gift return" right beneath the area where you previously put in the demo order number and zip code.
  - The next screen asks for the order number (1001) and zip code (90401), but also asks for the gift recipients name, email address, and home address.
  - From there, they can move through the return flow in the same way as the above examples. The only difference is, they can only choose "Store Credit" as the refund option.
  
- DOWNLOAD A RETURN LABEL FOR MAIL RETURNS**
  - Select some items to return and click "Continue."
  - This time, when it asks you to choose your return method, click "Box and ship items using a pre-paid label."
  - Click "Continue" and "Submit your return" to get to the confirmation page.
  - At the bottom, you'll see a button to "Download Shipping Label." Click this to see a sample return label that your customer would print and attach to their box for a return by mail.
  
- FIND THE NEAREST RETURN BAR**
  - If you upgrade your account to offer in-person Return Bars, customers who choose this return method will be instructed to bring their items in to the closest drop-off location without a box or a label, for an immediate refund.
  - When you click "Drop items at Happy Returns" as your return method, it tells you the distance to the closest Return Bar based on the zip code you entered.
  - Click "Show more info" to see the address and store hours of the drop-off location.
  - After submitting your return, you can click "See All Return Bar Locations" to find other drop-off points convenient to you.