

Refund Processing

INTERNAL — Helix Engineering / CS Operations

POLICY

Helix does not offer refunds for partial months. Cancellations take effect at end of billing period; customer retains access through that period. Exceptions are limited and require approval.

EXCEPTIONS WHERE REFUNDS ARE OFFERED

(1) Customer was billed in error (duplicate charge, wrong plan). (2) Outage materially impacted the customer's ability to use the service for >25% of the billing period. (3) Plan change took effect incorrectly. (4) Account was charged after a cancellation request was confirmed.

APPROVAL REQUIRED FOR

Any refund over \$1,000. Any refund for an Enterprise customer. Any refund involving a credit card chargeback dispute.

PROCEDURE

(1) Verify the customer's claim against billing records. (2) Confirm the refund category from the exceptions list. (3) For amounts under \$500 and clear billing errors, the CSM can issue directly. For larger amounts, file a refund approval ticket with billing-leads@helix.io.

ISSUING THE REFUND

From the admin panel: Customer → Billing → Issue refund. Choose full or partial. Always include a memo describing the reason. The refund hits the original payment method within 5–10 business days.

DOCUMENTING

Every refund must be documented in the customer's account record with the reason and approver. This is required for SOC2 audit.

DECLINING REFUNDS

When declining a refund, use the standard decline template. Offer service credits as an alternative for goodwill cases. Service credits are easier to approve and customer-retained.