Put the risk score in the ticket, before the agent replies.

Every support ticket that touches an order already carries risk information your team owns. It just rarely reaches the agent at the moment it matters. Wyllo surfaces its risk score and behavioral signals inside the Gorgias ticket the instant a customer reaches out, and Gorgias Rules act on them: tagging, prioritizing, routing, and scoping what your AI Agent resolves on its own. Every rule reads **intent**, so scrutiny lands where risk is and speed lands everywhere else.

Audience: **CX & Support leads** Stack: **Wyllo · Gorgias · Shopify**

HOW IT WORKS

Wyllo is the "if," your team is the "then".

Wyllo writes its risk score and underlying signals into Gorgias as tags and ticket data. Gorgias Rules run on plain IF/THEN logic: a rule triggers off a customer tag, total spend, or order count, then applies a tag, sets priority, routes to a view, or assigns an agent or team.

In practice, **Wyllo's output becomes the "if," and your team defines the "then"** to match how your support org already operates. The seven workflows below each name the Wyllo signal that fires them, the Gorgias action they take, and the outcome they protect.

THE PLAYBOOK

Seven Workflows to Build

Each turns a signal you already have into an action your team doesn't have to remember.

WORKFLOW	WYLLO SIGNAL	GORGIAS ACTION	PAYOFF
1 · Risk-based triage & routing	High risk score, or a flag like blacklist or return abuse	Tag "Risk Review," route to a dedicated view, raise priority, suppress self-service refund macros	Fraud tickets get expert eyes before money moves, without slowing the clean majority
2 · Trusted-customer fast lane	Customer matches a Wyllo-defined "Trusted" segment	Tag "Trusted," unlock one-click refund/exchange, allow AI Agent auto-resolution	Faster resolutions for good customers, and a safe path to expand unattended AI
3 · VIP handling by TCLTV	Customer matches a Wyllo "VIP" segment (high True Customer Lifetime Value)	Tag "VIP," route to senior agents, tighten SLA; if a risk flag also fires, escalate to a specialist instead	White-glove service, covered for the case where "VIP" and "safe" diverge
4 · Serial returner handling	Return-abuse threshold crossed (wardrobing, bracketing, refund-as-a-service)	Tag "Return Policy Review," route to a policy-enforcement macro (restocking fee, store credit)	Return costs stay contained without agents memorizing repeat offenders
5 · Item-not-received triage	Clean INR versus a flagged customer or address history	Clean: fast-replacement macro. Flagged: route to manual review	Genuine claims resolve in minutes; suspicious ones get a second look
6 · Chargeback & dispute prep	Prior chargeback history on the customer	Auto-post an internal note, trigger an evidence-focused macro	Stronger, faster representment, and fewer teams caught flat-footed
7 · Account takeover hold	ATO signal on an address or payment change request	Trigger identity verification, hold the change until ownership is confirmed	Hijacking caught at the desk, not as a chargeback three weeks later

ROLLOUT

Build in Phases, Not All at Once

Each phase earns the trust to expand the next.

1 Foundation · Weeks 1–2

What the integration is built for, lowest lift, most visible payoff.

- Risk-based triage & routing
- Trusted-customer fast lane

2 Relationship-aware · Weeks 3–4

Worth doing once Phase 1 has built trust in the tagging, since it needs internal agreement on thresholds.

- VIP handling by TCLTV
- Serial returner handling

3 Advanced protection · Month 2+

Higher-stakes, lower-frequency scenarios, best layered on once the team trusts acting on Wyllo signals.

- Item-not-received triage
- Chargeback & dispute prep
- Account takeover hold

UNDER THE HOOD

How the Signal Reaches the Ticket

Four mechanical pieces feed the rules above. Build them once and every workflow reads from them.

Shopify → Gorgias Ticket Creation

Open a risk-alert ticket the moment a Wyllo risk tag lands on a Shopify order, so the review ticket exists before the customer even writes in. Built with Shopify Flow, or a Gorgias rule on the order's tags.

Internal Notes by Risk Type

Post the risk score and the signals behind it as an internal note on the ticket, so the agent sees the context inline instead of opening another tab.

Auto-Tagged Replacements & Refunds

Tag each resolution reason (replacement, refund, reship) as it happens. This feeds reporting and scopes what the AI Agent is allowed to resolve unattended.

UPSTREAM: SHOPIFY FLOW AUTO-TAG BY REASON

The resolution and reason tags the Gorgias rules read are written upstream by a Shopify Flow that auto-tags orders by reason. Build that Flow first; the helpdesk rules are only as good as the tags feeding them.

BEFORE YOU BUILD

Exact tag names, custom fields, and rule syntax depend on your Gorgias plan and how your Wyllo integration is configured. Confirm which fields are available to sync with your Wyllo customer success contact before your team writes the rules.

MEASURE

What Good Looks Like

- **Risk-review catch rate** — share of fraud and abuse tickets routed to the Risk Review view before a refund or reship goes out.
- **First response time, by tier** — falling for Trusted and VIP, holding for Risk Review where scrutiny is the point.
- **Representment win rate** — rising as chargeback history reaches agents at the moment of response.
- **AI auto-resolution rate** — share of trusted-segment tickets the AI Agent closes unattended, trending up safely.
- **Return-policy enforcement** — share of serial-returner tickets routed to the policy macro instead of the default "no questions asked."
- **ATO holds cleared** — account-change requests verified before processing, tracked against downstream disputes.

This is one chapter of the Wyllo Merchant Playbook. On Kustomer or Zendesk? The same workflows rebuild on your stack.

Explore Wyllo