

SHOPIFY AUTOMATION BLUEPRINT

EU Right of Withdrawal Automated Flow

A complete, no-code installation guide for a self-service withdrawal request form with automatic confirmation email — built entirely on free Shopify apps.

- ▶ Shopify Forms — customer-facing withdrawal request form
- ▶ Shopify Flow — automation trigger & logic
- ▶ Flow Transactional Email — branded confirmation email

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1. Overview

This blueprint gives your customers a self-service way to exercise their **EU Right of Withdrawal** (14-day cooling-off period) directly from your storefront, with zero manual work on your side. When a customer submits the form, they instantly receive a branded confirmation email — no app subscription, no custom code, no monthly cost.

What you're building

A customer-facing form on a dedicated storefront page → an automated trigger the moment the form is submitted → a branded confirmation email sent automatically to the customer.

The 3 components (all free)

Component	Role	Cost
Shopify Forms	Captures the withdrawal request data and stores it as a metaobject	Free
Shopify Flow	Listens for new submissions and triggers the email automatically	Free
Flow Transactional Email	Sends the branded HTML confirmation email to the customer	Free

How the data flows

```
Customer fills form → Shopify Forms creates a Metaobject
↓
Shopify Flow trigger: "Metaobject created"
↓
Flow action: "Send transactional email"
↓
Customer receives branded confirmation email
```

2. Prerequisites

This guide assumes the following are already installed and connected on your Shopify store:

- **Shopify Forms** app (free, from the Shopify App Store)
- **Shopify Flow** app (free, pre-installed on most plans)
- **Flow Transactional Email** app, with a verified sender email/domain connected (e.g. your Google Workspace / Gmail-hosted domain address)

Sender verification

Flow Transactional Email requires a verified sending domain or mailbox before it can deliver emails. Make sure your sender address (e.g. info@yourdomain.com) is verified in the app's sender settings before testing this flow — otherwise emails will silently fail to send.

Works on every Shopify plan, including Basic

This blueprint uses the **Flow Transactional Email** action directly — it does not rely on the [Send HTTP Request](#) action, which Shopify restricts to the Grow, Advanced, and Plus plans. Because of that, this setup runs identically on Basic, Grow, Advanced, and Plus.

Free-tier sending limit

The free plan of Flow Transactional Email allows up to **500 emails per month**. For most stores this comfortably covers withdrawal-request volume, but if your store processes a high number of requests monthly, check your current usage in the app and upgrade the email plan if you're approaching the limit — otherwise confirmation emails will stop sending once the cap is reached.

3. Step 1 — Build the Withdrawal Form

1 App: Shopify Forms → Create form → Inline form

Create a new inline form named **"Request withdrawal"**. This form will collect exactly the data required by the EU withdrawal directive: customer identity, order reference, and an optional note.

Form fields (in this order)

Field	Type	Required	Notes
First name	Text	Yes	Customer metafield
Last name	Text	Yes	Customer metafield
Order ID	Text	Yes	Customer metafield
Email	Text	Yes	Used as the recipient address by Flow
Custom note	Long text	No	For partial withdrawals — customer specifies which item(s)

Data capture setting

Under **Fields**, keep the field set to **Customer** → *Company and customer*. Form submissions will automatically create or update a customer record with these fields as customer metafields — this is what Shopify Flow will read from in Step 5.

Fields configuration — First name, Last name, Order ID, Email, Custom note

Live front-end result — the customer-facing form

Button & consent settings

- **Email marketing consent:** set to "Don't subscribe customers to marketing" — this is a compliance form, not a newsletter sign up
- **Button label:** [Confirm withdrawal](#)
- **Consent disclaimer (optional):** "Use this form to exercise your right of withdrawal within 14 days of receiving your order. After submitting, you will receive an email confirmation."

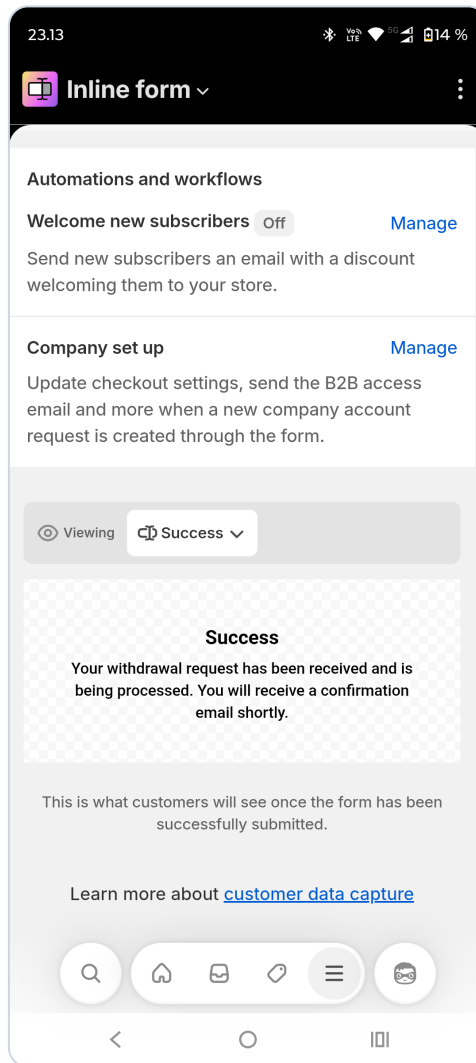
4. Step 2 — Configure the Success Message

- Under **Confirmation behavior**, keep the setting on **Show message** (not "Redirect to another page") — the customer gets instant on-page confirmation, and the email arrives moments later via Flow.

Success block content

Field	Value
Title	Success
Content	Your withdrawal request has been received and is being processed. You will receive a confirmation email shortly.

Confirmation behavior set to "Show message" with consent disclaimer configured



Live preview of the success state shown to the customer after submission

5. Step 3 — Build the Landing Page

3 Create a new page (e.g. `/pages/withdrawal-request`) using the Shopify theme editor, and add the following blocks in order:

1. **Heading** — page title, bound to `{{ closest.page.title }}`
2. **Text block** — explains the 14-day EU withdrawal right
3. **Spacer**
4. **Text block ("How it works")** — numbered steps for the customer
5. **Text block ("Submit your withdrawal request")** — sub-heading directly above the form
6. **Text block** — short consent statement above the button
7. **Form block** — insert your **"Request withdrawal"** inline form here (app block: Shopify Forms)

Copy-paste ready

If your theme supports JSON template editing, the exact section structure (headings, text blocks, spacer, and the form app block reference) is provided in **Appendix A** at the end of this guide — you can paste it directly into your page template's `.json` file and adjust the copy to match your brand voice.

Suggested customer-facing copy

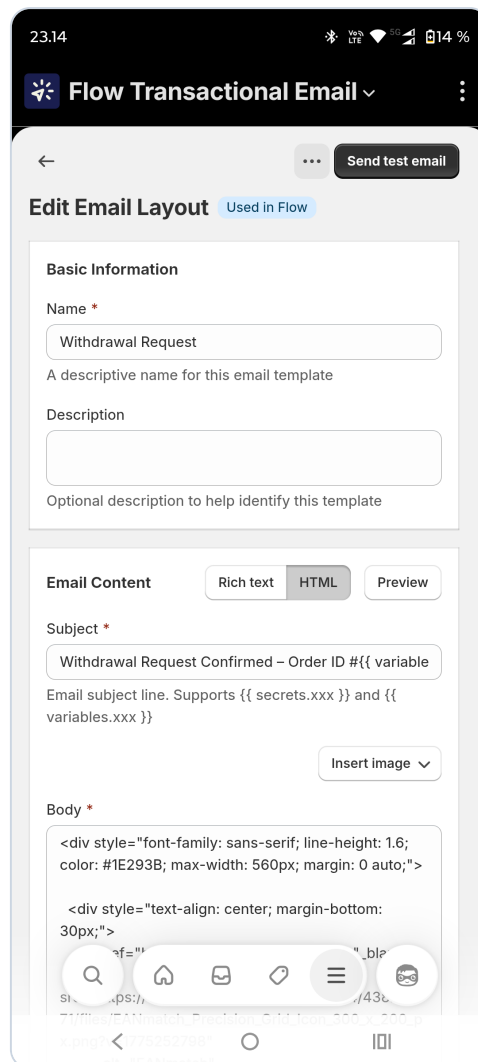
- **Intro:** "Under EU consumer law, you have the right to withdraw from your purchase within 14 days of receiving your order, without giving any reason."
- **How it works:**
 1. Complete the form below with your name, order number and email address. If you wish to withdraw only part of your order, specify which item(s) in the "Custom notes" field.
 2. Click "Confirm withdrawal" to submit your request.
 3. You will receive an email confirmation immediately after submission.

6. Step 4 — Create the Confirmation Email Layout

4 App: Flow Transactional Email → Create email layout

Create a new email layout named **"Withdrawal Request"**. Switch the Email Content editor from *Rich text* to **HTML** — this gives you full control over the confirmation email design.

Field	Value
Name	Withdrawal Request
Subject	Withdrawal Request Confirmed – Order ID #{{ variables.order_id }}
Sender	Your connected/verified mailbox (e.g. Google Workspace address on your domain)



Email layout editor — Name, Subject, and HTML content mode

Email body (HTML)

Paste the following into the **Body** field. It renders a branded summary table with the customer's submitted data and the 14-day refund deadline:

```

<div style="font-family: sans-serif; line-height: 1.6; color: #1E293B; max-width: 560px;
margin: 0 auto;">
  <div style="text-align: center; margin-bottom: 30px;">
    <a href="https://yourdomain.com" target="_blank">
      
    </a>
  </div>
  <h2 style="color: #0029B8; text-align: center;">Withdrawal Request Received ✓</h2>
  <p>Dear {{ variables.first_name }},</p>
  <p>We have received your withdrawal request. Below is a summary of your submission:</p>
  <table style="width: 100%; border-collapse: collapse; margin: 20px 0; font-size:
0.95rem;">
    <tr style="border-bottom: 1px solid #f1f5f9;">
      <td style="padding: 10px 0; color: #64748b; width: 55%;">Status</td>
      <td style="padding: 10px 0; font-weight: 800; color: #0029B8;">Registered</td>
    </tr>
    <tr style="border-bottom: 1px solid #f1f5f9;">
      <td style="padding: 10px 0; color: #64748b;">First name</td>
      <td style="padding: 10px 0; font-weight: 700;">{{ variables.first_name }}</td>
    </tr>
    <tr style="border-bottom: 1px solid #f1f5f9;">
      <td style="padding: 10px 0; color: #64748b;">Last name</td>
      <td style="padding: 10px 0; font-weight: 700;">{{ variables.last_name }}</td>
    </tr>
    <tr style="border-bottom: 1px solid #f1f5f9;">
      <td style="padding: 10px 0; color: #64748b;">Order ID</td>
      <td style="padding: 10px 0; font-weight: 700;">#{ {{ variables.order_id }}}</td>
    </tr>
    <tr style="border-bottom: 1px solid #f1f5f9;">
      <td style="padding: 10px 0; color: #64748b;">Request submitted</td>
      <td style="padding: 10px 0; font-weight: 700;">{{ variables.created_at | date: "%d/%m/
%Y %H:%M" }}</td>
    </tr>
    <tr>
      <td style="padding: 10px 0; color: #64748b;">Refund deadline</td>
      <td style="padding: 10px 0; font-weight: 800; color: #0029B8;">Within 14 days</td>
    </tr>
  </table>
  <p style="font-size: 0.95rem; color: #475569;">Your request has been registered in
accordance with <strong>EU Directive 2023/2673</strong>. We will review your order and
process your refund within 14 days of this request.</p>
  <p style="font-size: 0.95rem; color: #475569;">If you have any questions, please reply to
this email or contact us directly at <a href="mailto:YOUR_SUPPORT_EMAIL" style="color:
#0029B8; font-weight: 700;">YOUR_SUPPORT_EMAIL</a>.</p>
  <hr style="border: none; border-top: 1px solid #e2e8f0; margin: 24px 0;">
  <p style="font-size: 0.85rem; color: #94a3b8; text-align: center;">Your Store · Legal
entity name (VAT) · Address</p>
</div>

```

Before you go live

Replace `YOUR_LOGO_URL` , `yourdomain.com` , `YOUR_SUPPORT_EMAIL` , and the footer legal line with your own brand details. Use **Send test email** (top-right of the editor) to preview rendering before connecting it to Flow.

7. Step 5 — Build the Shopify Flow Automation

5 App: Shopify Flow → Create workflow

This is the connective layer: it watches for new form submissions and triggers the confirmation email automatically. The workflow has exactly two steps.

Trigger: Metaobject created

Setting	Value
Trigger	Metaobject created
Metaobject type filter	The metaobject definition generated by your Shopify Forms form (shown as <code>app--[app-id]--shopify-forms[form-id]</code> in the trigger config)

Action: Send transactional email

Field	Value
To	<code>{{ metaobject.email }}</code>
CC / BCC	Leave blank (or add your support inbox on BCC to log every request)
Email layout	Select the layout created in Step 4 ("Withdrawal Request")

Variables mapping (JSON)

In the action's **Variables** field, map each email template variable to its corresponding metaobject field:

```
{
  "first_name": "{{metaobject.firstName}}",
  "last_name": "{{metaobject.lastName}}",
  "order_id": "{{metaobject.orderId}}",
  "created_at": "{{metaobject.formSubmittedAt}}"
}
```

Why "metaobject.firstName" and not "metaobject.first_name"

Shopify Forms auto-generates a metaobject definition where each form field becomes a camelCase field handle (e.g. `firstName`, `orderId`, `customNote`), regardless of how the field was labeled in the form builder. Always check the exact handle under the metaobject definition before mapping variables in Flow — see the reference table in Step 6.

8. Step 6 — Field Mapping Reference

Use this table as the master reference when wiring the Flow action. It shows how each customer-facing form field maps through to the metaobject field handle and finally to the email variable.

Form field (customer sees)	Metaobject field handle	Metaobject key	Email variable
First name	<code>firstName</code>	<code>first_name</code>	<code>{{ variables.first_name }}</code>
Last name	<code>lastName</code>	<code>last_name</code>	<code>{{ variables.last_name }}</code>
Order ID	<code>orderId</code>	<code>order_id</code>	<code>{{ variables.order_id }}</code>
Email	<code>email</code>	<code>email</code>	used directly as <code>To</code> address
Custom note	<code>customNote</code>	<code>custom_note</code>	not used in default template — available if you extend it
(system)	<code>formSubmittedAt</code>	<code>form_submitted_at</code>	<code>{{ variables.created_at }}</code>

Optional extension

The `customNote` field is captured but not shown in the default email. To display partial-withdrawal notes to the customer, add a row to the HTML table in Step 4 and include `"custom_note":`
`"{{metaobject.customNote}}"` in the Flow variables JSON.

9. Testing the Flow End-to-End

1. Open your withdrawal request page on the live storefront (or preview).
2. Submit the form with a real email address you control.
3. Confirm the on-page success message appears immediately (Step 2).
4. In Shopify Flow, open the workflow's **Run history** and confirm the run shows a green "Success" status for both the trigger and the email action.
5. Check the inbox of the test email address — the confirmation should arrive within a minute.
6. Open **Shopify admin** → **Customers** and confirm a customer record was created with the submitted metafields attached.

10. Troubleshooting

Symptom	Likely cause	Fix
Form submits, no email arrives	Sender not verified in Flow Transactional Email	Verify your sending domain/mailbox in the app's settings
Flow run shows "Skipped" on trigger	Metaobject type filter doesn't match the form's generated type	Re-select the correct metaobject type in the trigger step
Email arrives with blank variables	Field handle mismatch between metaobject and Flow variables JSON	Cross-check against the mapping table in Step 6 — handles are camelCase
Customer record not created	Form's data capture setting isn't set to "Customer"	Revisit Step 1 → Fields → set to Company and customer
Email lands in spam	Sending domain lacks SPF/DKIM alignment	Verify domain authentication in your email sender's DNS settings
Emails stop sending mid-month	Free Flow Transactional Email plan cap reached (500/month)	Check usage in the app; upgrade the email sending plan if volume exceeds the free tier

11. Legal Note & Compliance Reference

This flow operationalizes the customer-facing collection of a withdrawal request under EU consumer protection rules (commonly referenced alongside **EU Directive 2023/2673** on distance contracts). It automates the *notification and acknowledgment* step — it does not automate refund processing, which remains a manual decision in your order management system.

Not legal advice

This guide provides a technical implementation only. Withdrawal periods, exceptions (e.g. custom-made or perishable goods), and refund obligations vary by product category and jurisdiction. Confirm your store's specific policy wording with a qualified advisor before publishing the withdrawal page.

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