

CRM - Automation

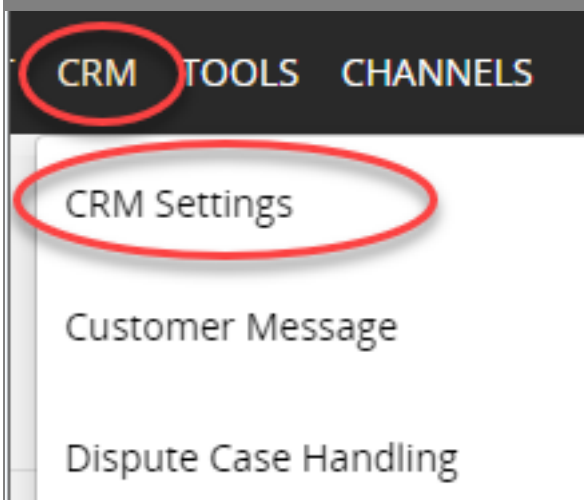
913 | 913 | 913: Fri, Nov 5, 2021 4:27 PM

CRM - Automation

1. Auto Translation
2. Auto Assign Message to staff
3. Auto Reply message to buyer
4. Auto Issue Refund after Supervisor approved

1. Auto Translation

Go to **CRM > CRM Settings**



Choose the default target language for your messages, enable <Import Message Auto-translation>

CRM Settings

[Help](#)

TRANSLATION

Default language which system should translate to:

繁體 (Traditional Chinese) ▾

Import Message Auto-translation:



Confirmation is needed whenever the translation icon is clicked:



Click <Confirm>

Confirm

Cancel

2. Auto Assign Message to staff

Go to **CRM > Message Automation > Message Assign-to-staff**

CRM TOOLS CHANNELS

CRM Settings

Customer Message

Dispute Case Handling

Refund Management

PayPal Invoice Management

Performance Reporting

Message Automation >

Message Assign-to-staff

Message Settings >

Messages Automation Rule

Or you can also go to **Customer Management Icon > Message Assignment Maintenance**

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Customer Center

Customer Message Center

Customer Resolution Center

Message Template Maintenance

Message Assignment Maintenance

Auto Reply Maintenance

Message Tag Maintenance

Click <Add + >



100+

100+



Sourcing

Add +

Fill in details and save

Rule (Message Staff Assignment)

1

Rule Type: On Message Arrival

Rule Name: 2 new_rule_1595231380275

3

Criteria Matching Logic: Match All Following Criteria

Criteria: 3

4

Action: Message Staff Assignment

5

6

Close

Operation instructions:

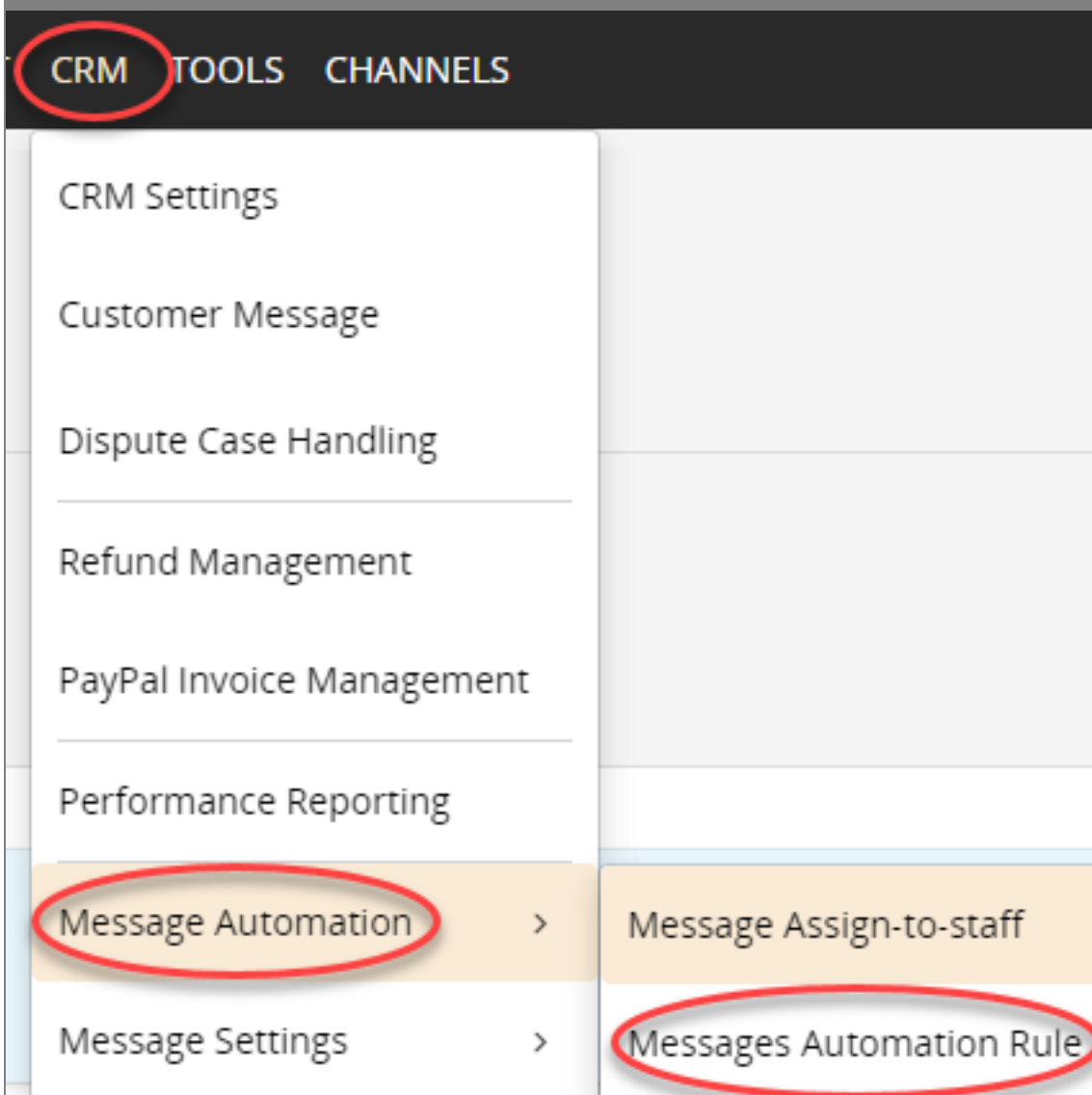
1. On/Off: Blue is On, grey is Off. When creating the new rule, the switch default value is "Off", the user should turn on manually.
2. Rule Name: The user can customize the rule name
3. Criteria: The user can specify the conditions of the rule execution, so that the execution of the rule will be triggered only when certain conditions are met .
eg: When the <Sales Channel> of the received platform message is <Match> with account name <HC>, the system performs the operation
4. Action: The user can specify the action content of rule execution
eg? When receiving a platform message that complies with

the rules, **the message is <** Assign the following staff sub-accounts **as the person in charge of processing messages >**

5. Assign to Staff: Click to choose the staff sub-account to be added. It can add more than one person.
6. Select staff sub-account: Click to choose **the staff sub-account** . You can click it again to cancel the choice

3. Auto Reply message to buyer

Go to **CRM > Message Automation > Messages Automation Rule**



Or you can also go to **Customer Management Icon > Auto Reply Maintenance**

Customer Center

Customer Message Center

Customer Resolution Center

Message Template Maintenance

Message Assignment Maintenance

Auto Reply Maintenance

Message Tag Maintenance

Click <Add + >

100+ 100+ Sourcing

Add +

Rule (Auto Reply Message)

1

Rule Type: On Message Arrival

Rule Name: new_rule_1595237174163 2

Add Remark On/Off:

Criteria Matching Logic: Match All Following Criteria

Criteria 3

- Receive Date: After 2020-07-20 Add Remark
- eBay ID: Matches PM Add Remark

Action: Auto Reply Message 4

Action: Auto Reply Message Add Remark

Reply Content 6

Add a Template Tag 6

Load from Customer Message Template 7

5

Dear {{{Customer eBay ID}}}
 We have received your message, our store is currently on holiday mode, we will get back to you as soon as possible,
 Thanks and Regards,
 {{{Shop Name}}}

Save 8

Close

Operation Instructions:

1. On/Off: Blue is On, grey is Off. When creating the new rule, the switch default value is "Off", the user should turn on manually.
2. Rule Name: The user can customize the rule name
3. Criteria? | The user can specify the conditions of the rule execution, so that the execution of the rule will be triggered only when certain conditions are met | .

eg: When the <Receive Date> of receiving platform message is <After> the date

<2020-7-20>, and the message <eBay ID> is <match> with account name<PM>, the system performs the operation

4. Action: The user can specify the action content of rule execution

eg? When receiving a platform message that complies with the rules, the system uses the content in the input box below to reply automatically.

5. Reply Content: The text used for auto-reply

6. Add a Template Tag: The user can quote their store name, buyer's eBay account name, order ID or other information. The quoted content will appear as a three-layer curly bracket format.

7. Load from Customer Message Template? Click to select the pre-saved template in <Message Template Setting>. You can modify it after the selection.

8. Save: Click it to save the rule

4. Auto Issue Refund after Supervisor approved

For refund requests raised by CRM staff, when a supervisor(CRM admin) approves in Refund Management, SoldEazy will process the refund via PayPal/eBay API in the backend, and release the payment to your buyer, so that you don't have to log in to PayPal/eBay to manually refund.

Fin

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??URL: <https://www.soldeazy.com/support/article.php?id=913>