

# CRM - Automation

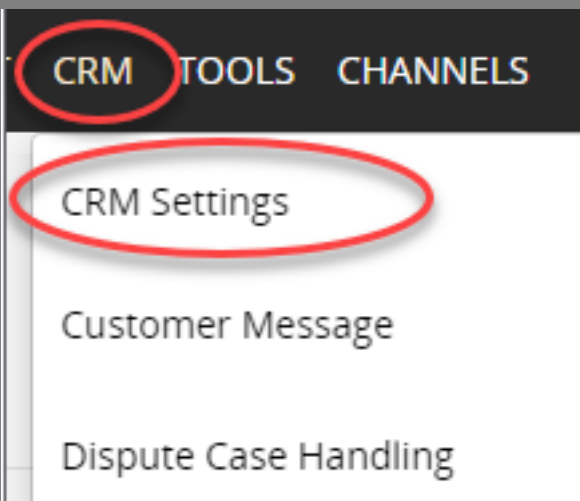
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## CRM - Automation

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2. [Auto Assign Message to staff](#)
3. [Auto Reply message to buyer](#)
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### 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:



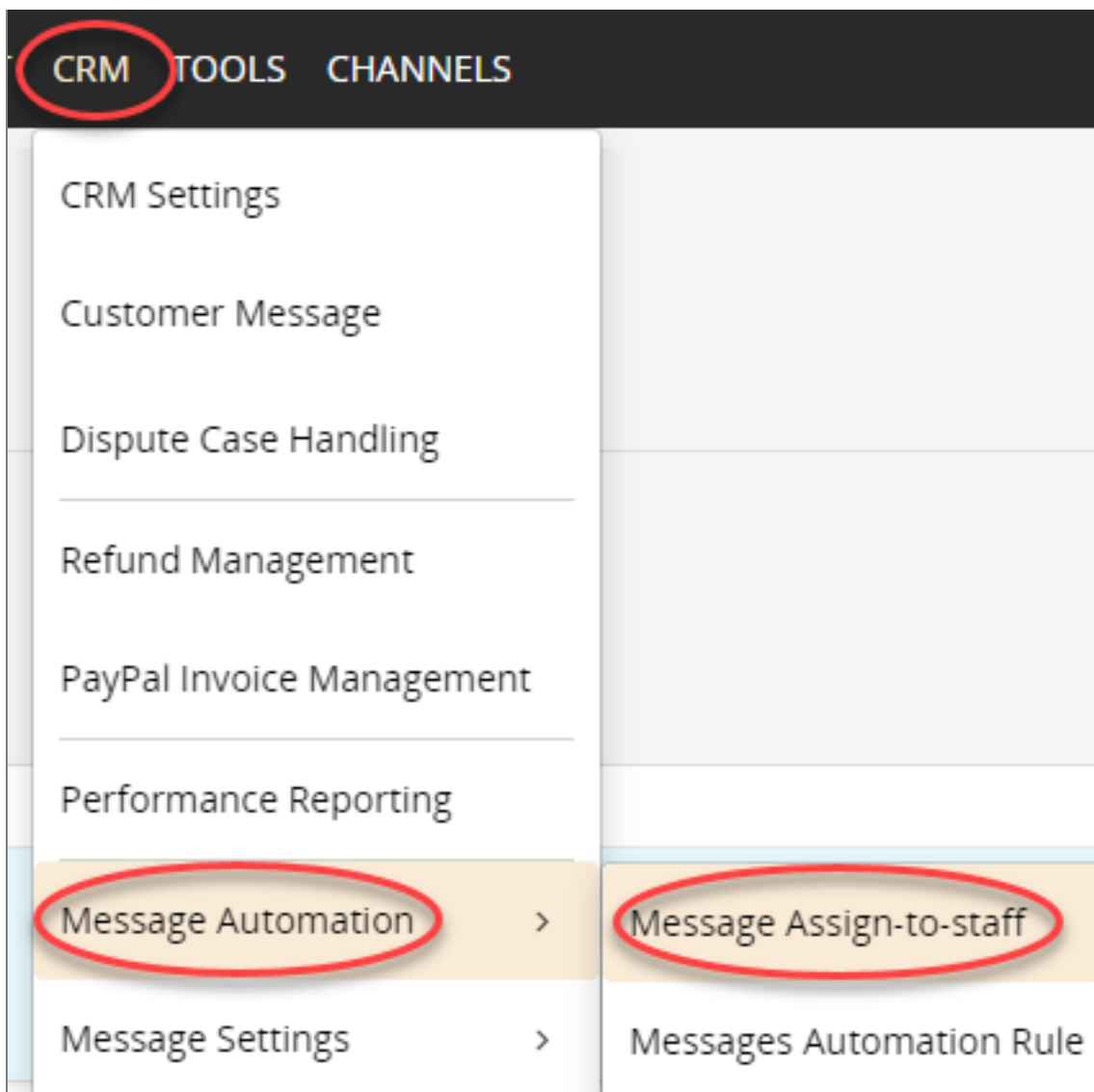
Click <Confirm>

Confirm

Cancel

2. Auto Assign Message to staff

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



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)

The screenshot shows the configuration interface for a 'Rule (Message Staff Assignment)'. It includes fields for Rule Type, Rule Name, On/Off toggle, Criteria Matching Logic, Criteria list, Action, and a detailed view of the Message Staff Assignment action with a staff selection dropdown.

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

### Operation instructions:

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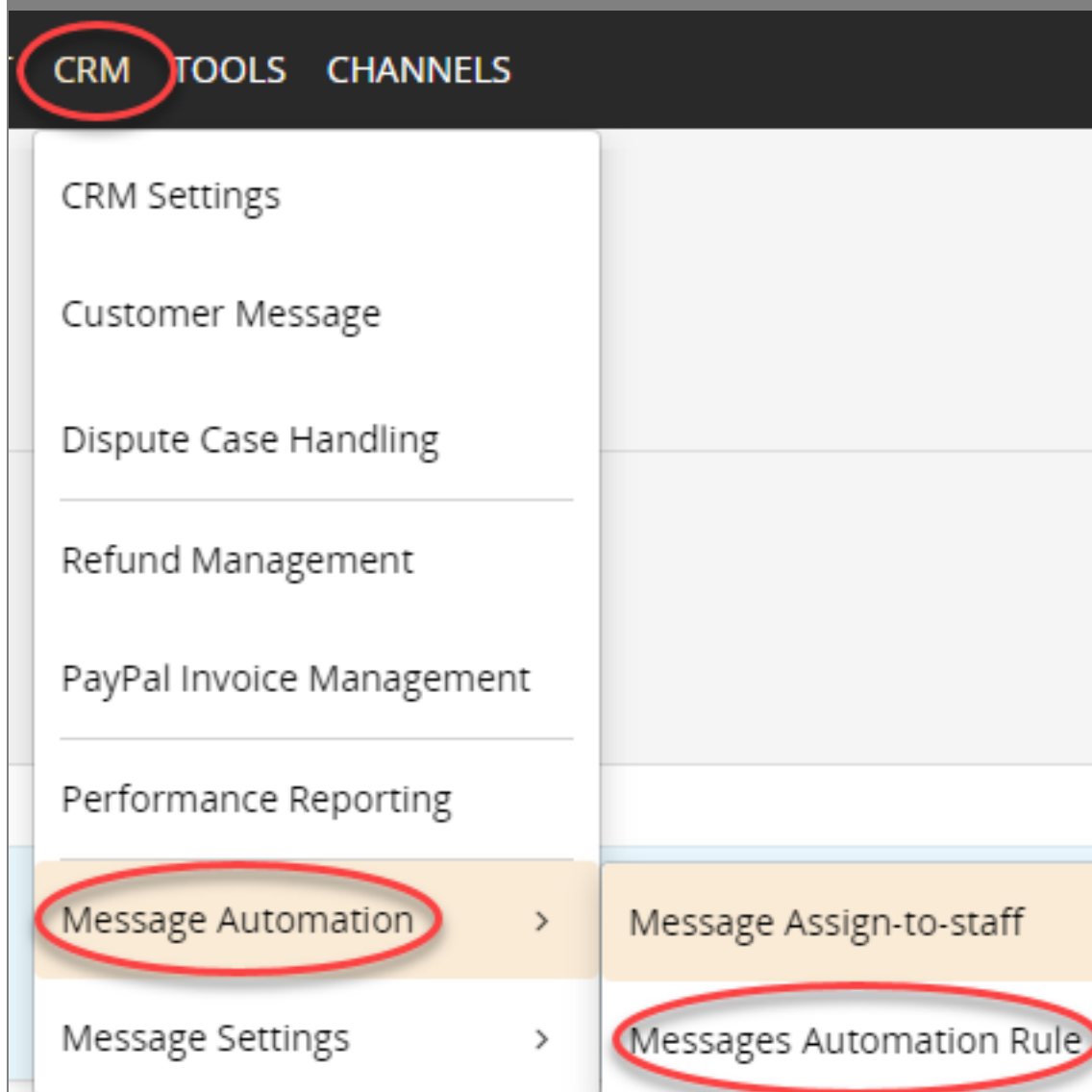
the rules, the message is < Assign the following staff sub-accounts as the person in charge of processing messages >

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**

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Customer Center

Customer Message Center

Customer Resolution Center

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Message Template Maintenance


Message Assignment Maintenance

Auto Reply Maintenance

Message Tag Maintenance

Click <Add + >

 100+ 100+ 

 Sourcing

Add +

## Rule (Auto Reply Message)

Rule Type

On Message Arrival

Rule Name

new\_rule\_1595237174163

Add Remark

On/Off



Criteria Matching Logic

Match All Following Criteria

Criteria



Receive Date

After

2020-07-20

Add Remark



eBay ID

Matches

PM

Add Remark

Action

Auto Reply Message



Action

Auto Reply Message

Add Remark

Reply Content

Add a Template Tag



Load from Customer Message Template

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

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, SoldEasy 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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