CRM - Management Control

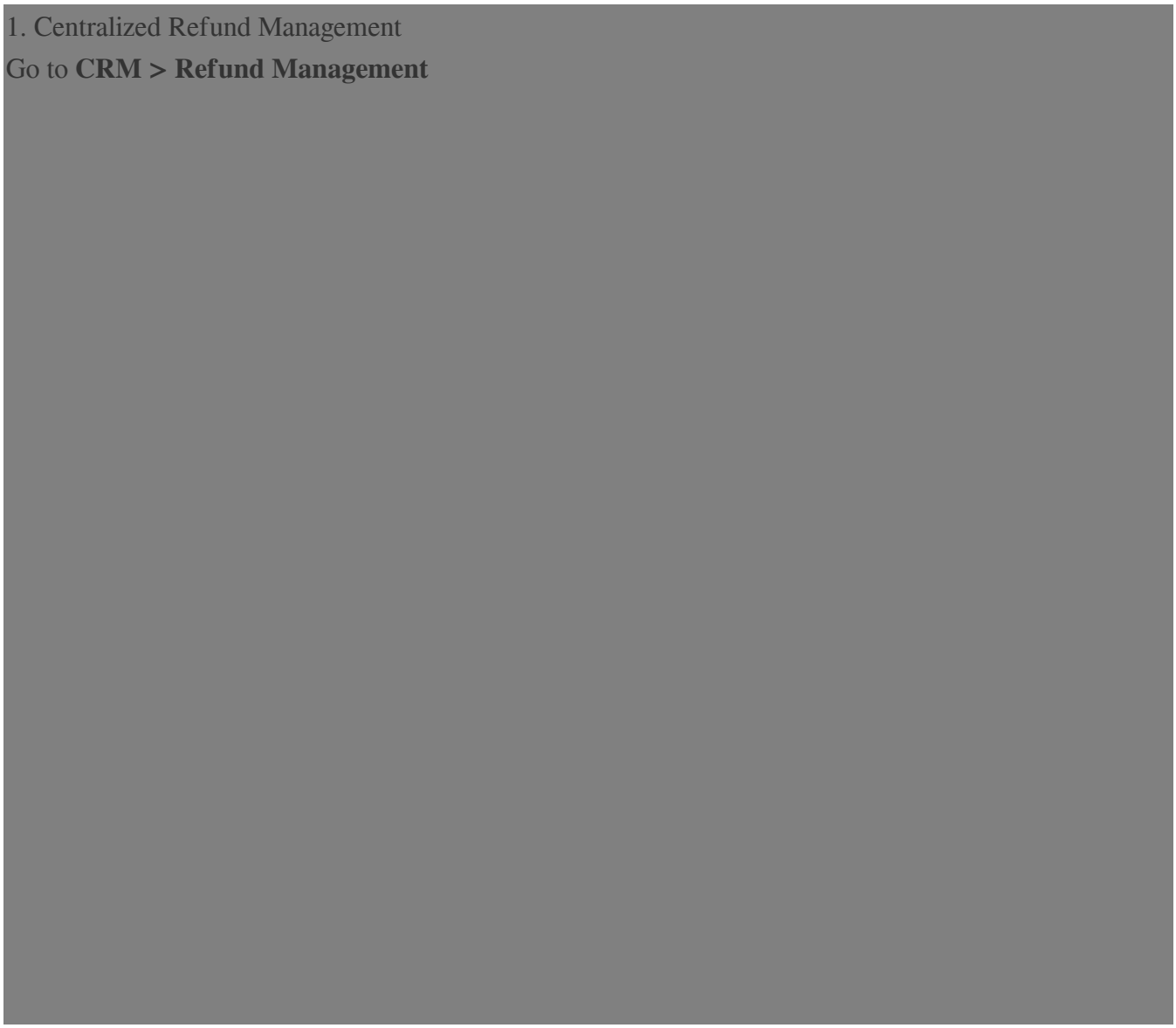
□□ID□□: 914 | □□: □□□ | □□□□: Fri, Nov 5, 2021 4:46 PM

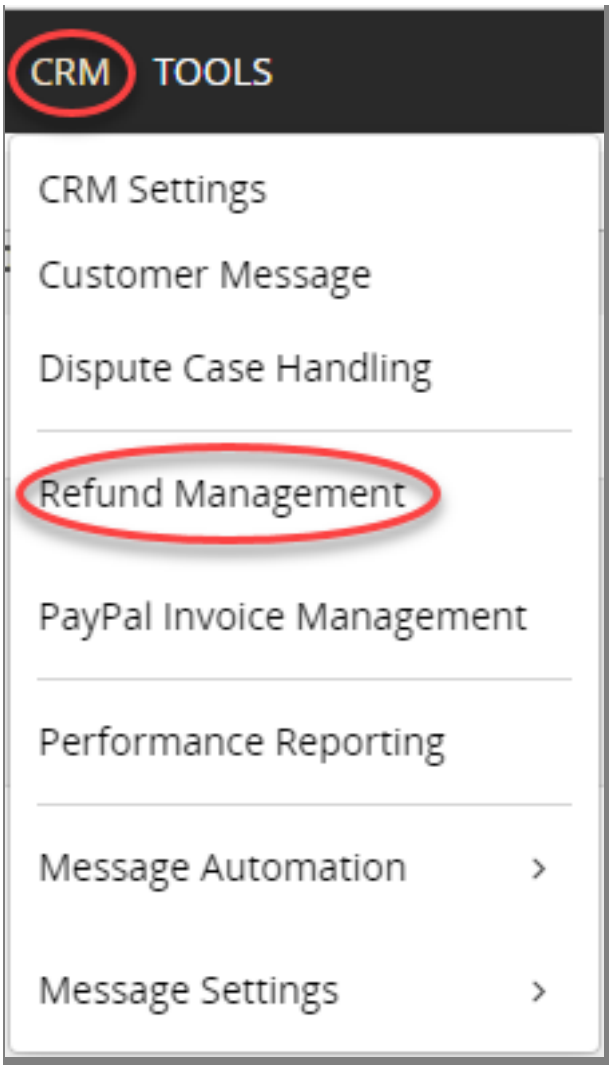
CRM - Management Control

1. Centralized Refund Management
2. Paypal Invoice Management
3. Staff Workload and Performance reporting

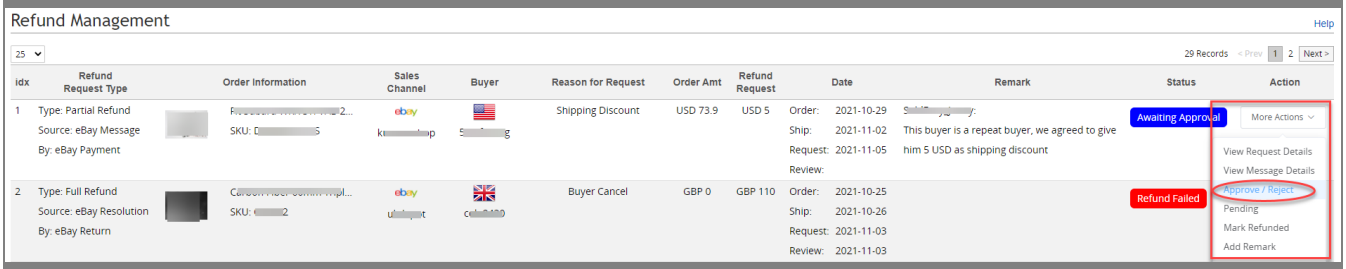
1. Centralized Refund Management

Go to **CRM > Refund Management**



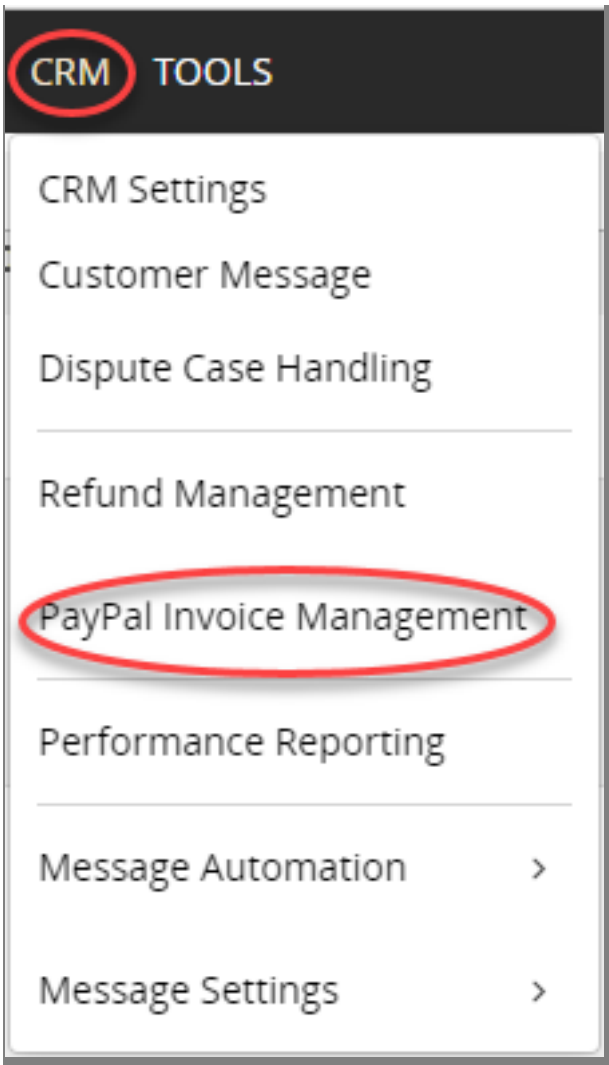


You can view refund requests raised by CRM staff and approve/reject requests.

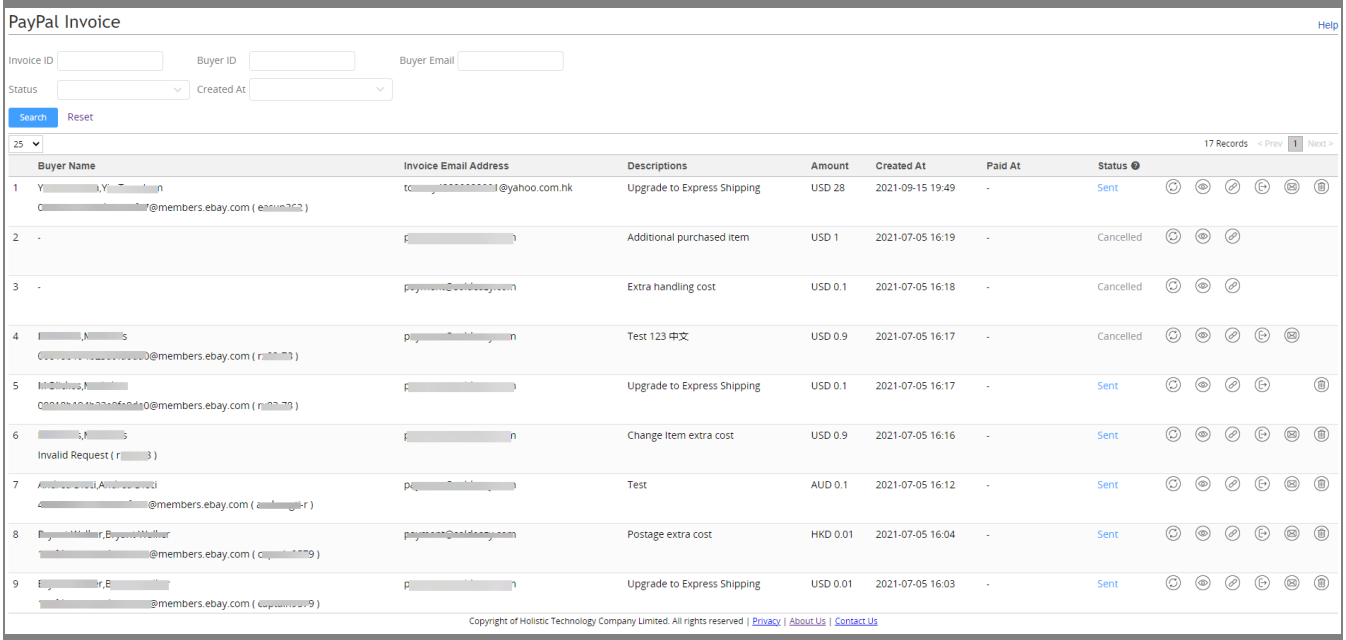


2. Paypal Invoice Management

Go to **CRM > PayPal Invoice Management**

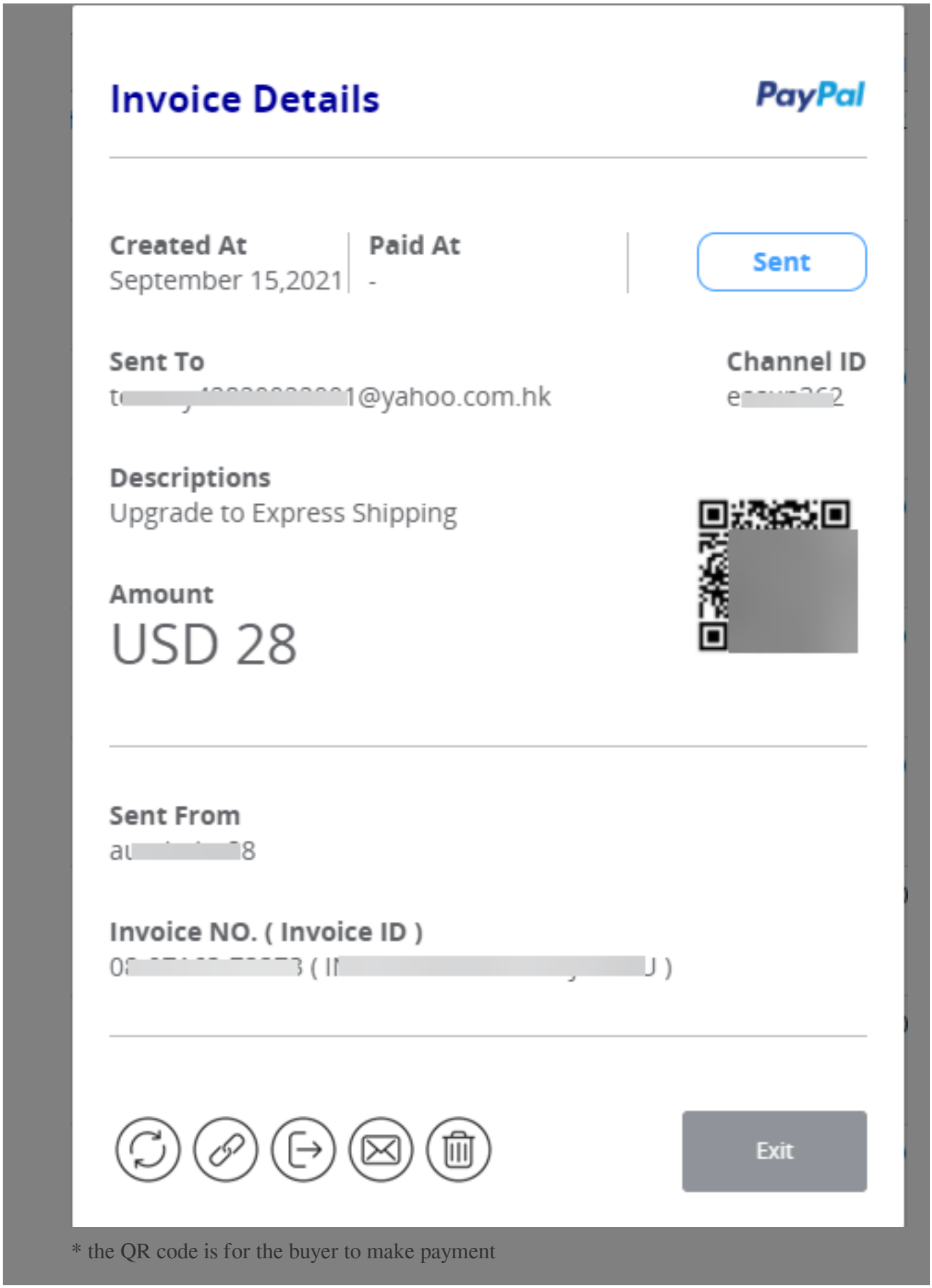


You can view all PayPal invoices sent via SoldEazy



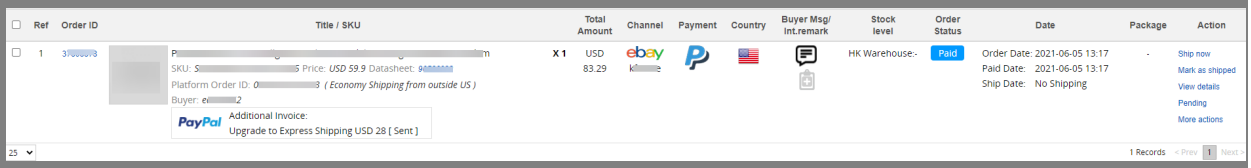
You can use action buttons on each invoice

1. Refresh Status: Click to get most recent status on this transaction
2. View Details: Click to view details of this invoice



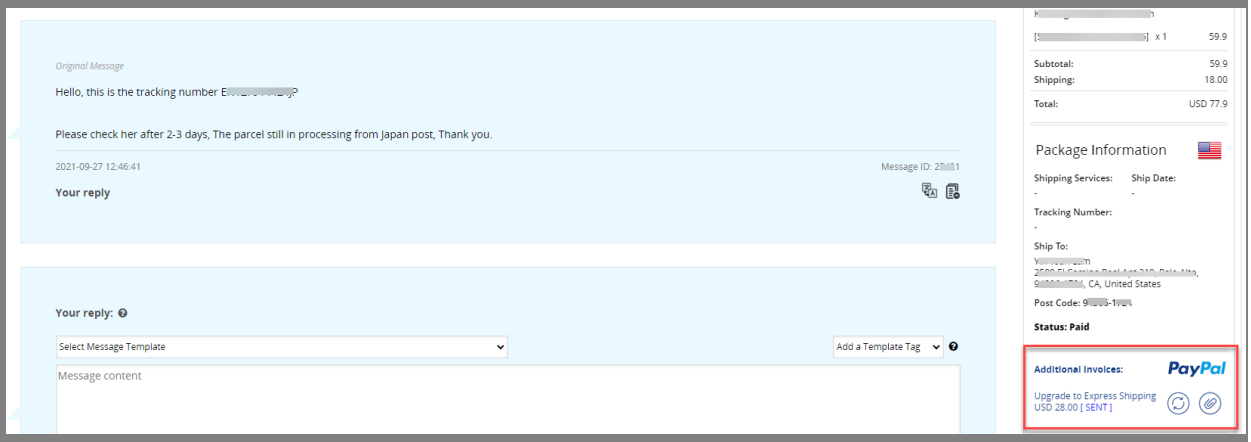
* the QR code is for the buyer to make payment

3. Copy Link: Click to copy the invoice link generated by PayPal, it looks like this: https://www.paypal.com/invoice/p/#xxxxxxxxx
4. Go to Order: Click to open a new tab page to view relevant order



The order will have a related "Additional Invoice" underneath

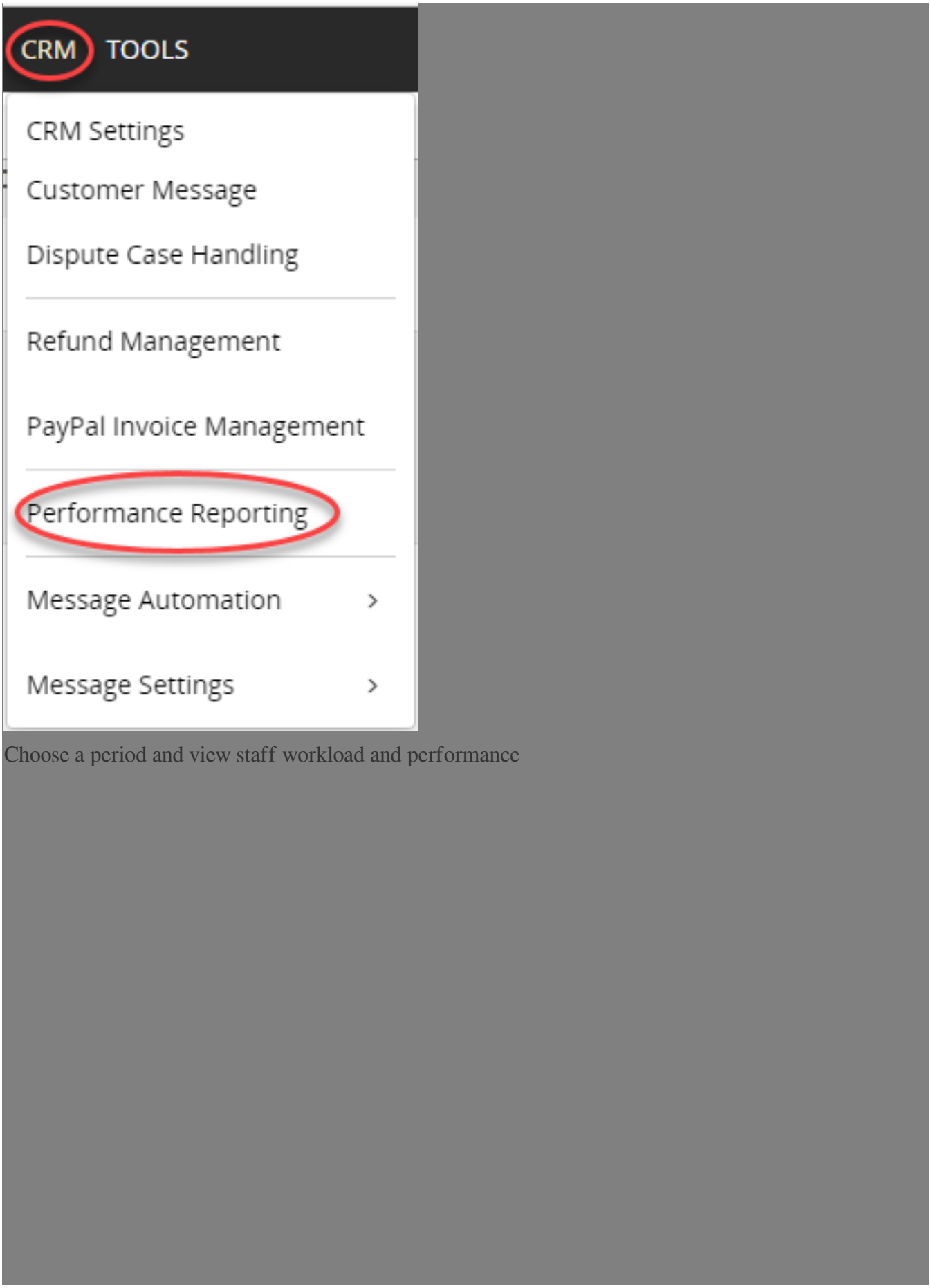
5. Go to Message: Click to open a new tab page to view the message where you initiated this additional invoice



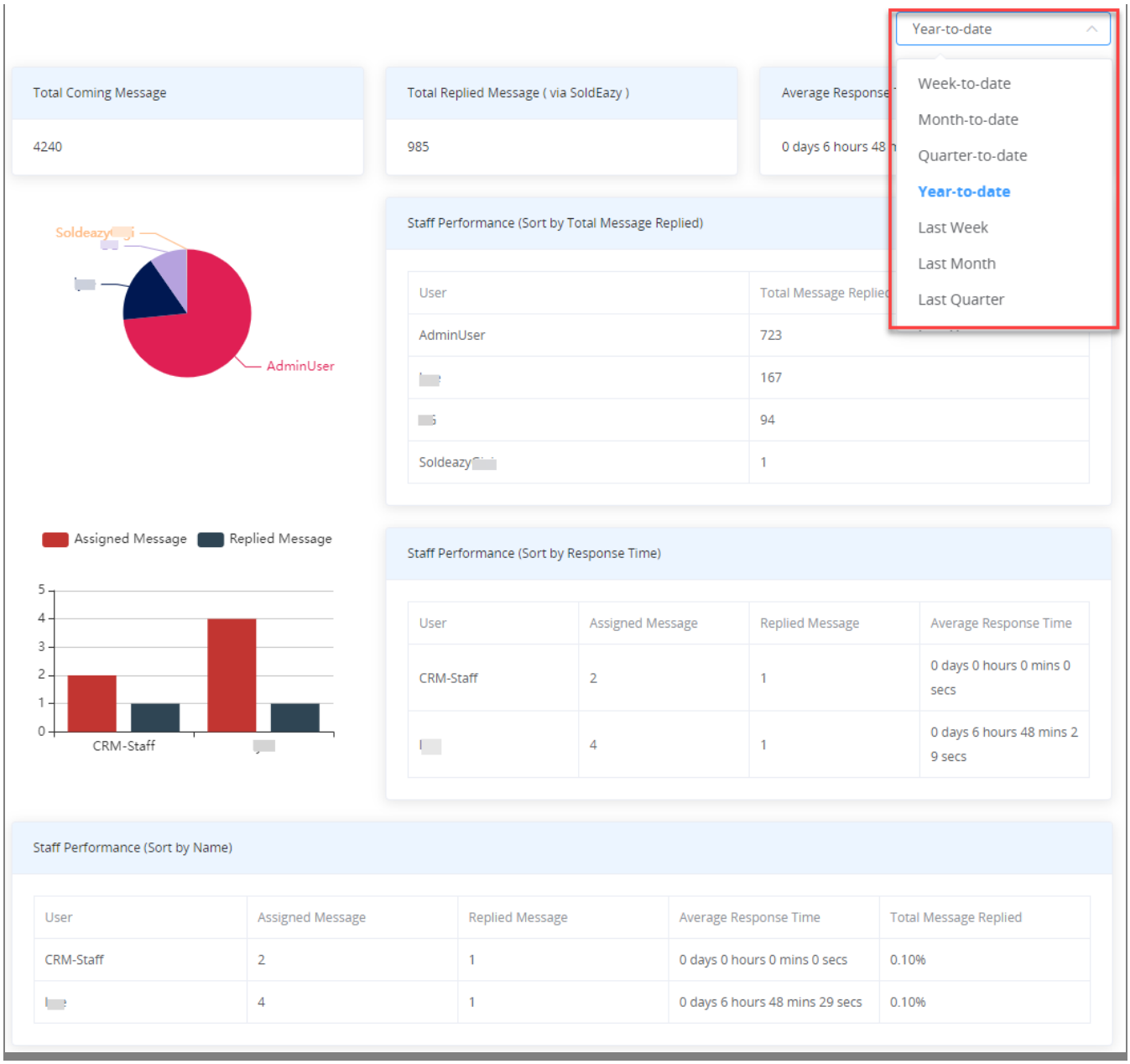
On bottom right is this additional invoice.

3. Staff Workload and Performance reporting

Go to **CRM > Performance Reporting**



Choose a period and view staff workload and performance



Fin

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