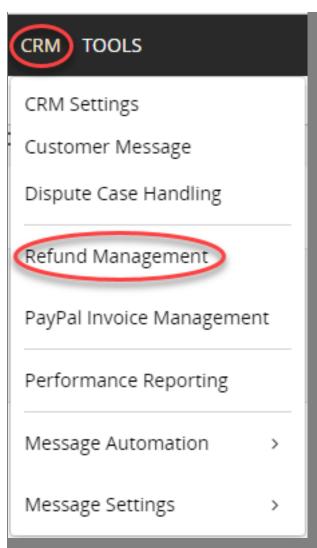
CRM - Management Control

22ID22: 914 | 22: 222 | 2222: Fri, Nov 5, 2021 4:46 PM

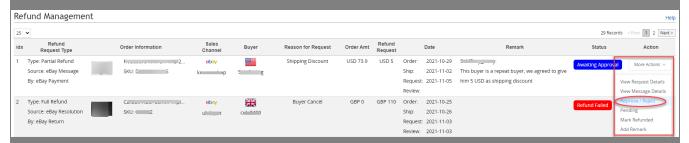
CRM - Management Control

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

Centralized Refund Management Go to CRM > Refund Management			

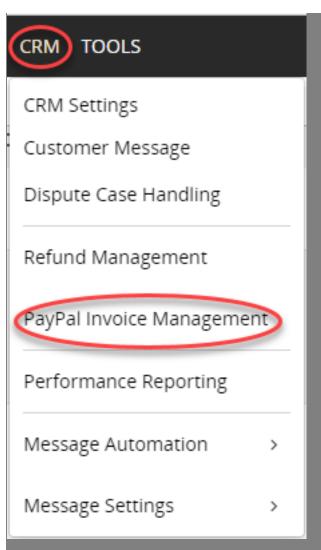


You can view refund requests raised by CRM staff and approve/reject requests.

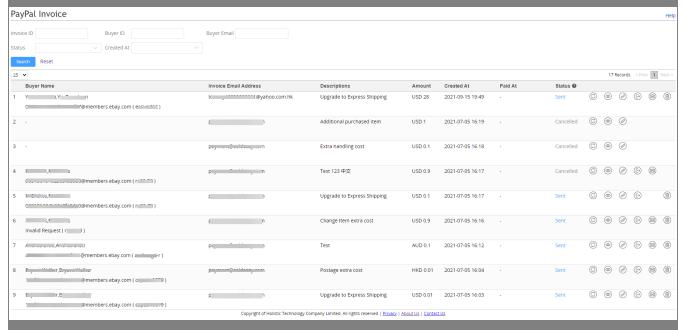


2. Paypal Invoice Management

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

Invoice Details

PayPal

Created At

September 15,2021 -

Sent

Sent To

tcm___100000001@yahoo.com.hk

Paid At

Channel ID

Descriptions

Upgrade to Express Shipping



Amount

USD 28

Sent From

aι 18

Invoice NO. (Invoice ID)

OE----3 (II





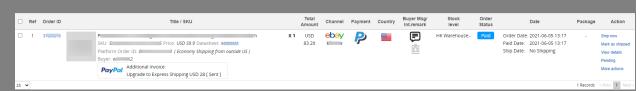






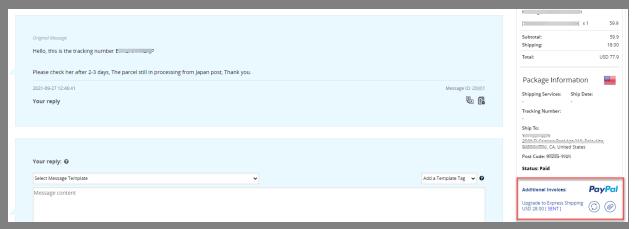
Exit

- 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



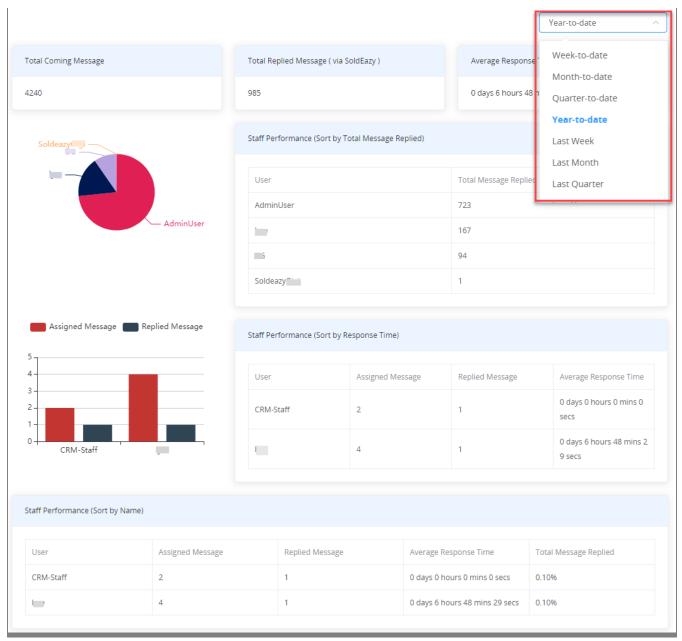
On bottom right is this additional invoice.

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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2.12 URL: https://www.soldeazy.com/support/article.php?id=914