CRM - Management Control

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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.

Re	efund Managemer	nt											Help
25	~											29 Rec	ords < Prev 1 2 Next >
id	x Refund Request Type		Order Information	Sales Channel	Buyer	Reason for Request	Order Amt	Refund Request		Date	Remark	Status	Action
1	Type: Partial Refund Source: eBay Message By: eBay Payment		F2 SKU: E 5	ebay kunninp	5	Shipping Discount	USD 73.9	USD 5	Order: Ship: Request Review:	2021-10-29 2021-11-02 t: 2021-11-05	S y: This buyer is a repeat buyer, we agreed to give him 5 USD as shipping discount	Awaiting Approv	al More Actions ~ View Request Details View Message Details
2	Type: Full Refund Source: eBay Resolution By: eBay Return		Concorner control pl SKU: 2	ebay ulinin,int	ccinant)	Buyer Cancel	GBP 0	GBP 110	Order: Ship: Request Review:	2021-10-25 2021-10-26 t: 2021-11-03 2021-11-03		Refund Failed	Approve / Reject Pending Mark Refunded Add Remark

2. Paypal Invoice Management

Go to CRM > PayPal Invoice Management



You can view all PayPal invoices sent via SoldEazy

PayPal Invoice											Help
Invoice ID Buyer ID	Buyer Email										
Status V Created At											
Search Reset											
25 🗸								17	Records		/ 1 Next >
Buyer Name	Invoice Email Address	Descriptions	Amount	Created At	Paid At	Status 🔞					
1 Y),Y 7 n C /@members.ebay.com (error 7/1)	tcl@yahoo.com.hk	Upgrade to Express Shipping	USD 28	2021-09-15 19:49	-	Sent	0	۲	Ø	⊕	8 1
2 .	ţ. D	Additional purchased item	USD 1	2021-07-05 16:19	-	Cancelled	Ø	۲	Ø		
3 -	المعرية (Carillana)	Extra handling cost	USD 0.1	2021-07-05 16:18	-	Cancelled	٢	۲	Ø		
4 I	pi, "'', n	Test 123 中文	USD 0.9	2021-07-05 16:17		Cancelled	٢	۲	Ø	⊕	8
5 Inclusion, Contraction of the MacOmmembers.ebay.com (n=2-73)	F D	Upgrade to Express Shipping	USD 0.1	2021-07-05 16:17	-	Sent	Ø	۲	Ø	Ð	۱
6 5,1 5 Invalid Request (r 3)	ţ n	Change Item extra cost	USD 0.9	2021-07-05 16:16	-	Sent	0	۲	Ø	⊕	
7 AiAti 4 @members.ebay.com (all internet internet)	pi, i i i i	Test	AUD 0.1	2021-07-05 16:12	-	Sent	Ø	۲	Ø	Ð	8 1
8 Dy	payment@neldeamy.com	Postage extra cost	HKD 0.01	2021-07-05 16:04	-	Sent	Ø	۲	Ø	₽	8 1
9 E r,E members.ebay.com (cupumus	p n	Upgrade to Express Shipping	USD 0.01	2021-07-05 16:03	-	Sent	Ø	۲	\oslash	Ð	8 1
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- 1. Refresh Status: Click to get most recent status on this transaction
- 2. View Details: Click to view details of this invoice

Invoice Details	PayPa
Created At Paid At September 15,2021 -	Sent
Sent To topposed 1@yahoo.com.hk	erana 262
Descriptions Upgrade to Express Shipping	■類編編 N
Amount USD 28	
Sent From au i 18	
Invoice NO. (Invoice ID)	J)
$\bigcirc \oslash \bigcirc \boxdot \boxtimes \textcircled{1}$	Exit

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

Re	f Order ID	Title / SKU		Total Amount	Channel	Payment	Country	Buyer Msg/ Int.remark	Stock level	Order Status	Date	Package	Action
0 1	37000078	P SKU: 5 5 Price: USD 59 9 Datasheet: personnel Platform Order ID: 0 Buyer: e 2 Public Platform Order ID: 0 Buyer: e 2 Public Additional Invoice:	X 1	USD 83.29	ebay kinne	₽		II.	HK Warehouse:-	Paid	Order Date: 2021-06-05 13:17 Paid Date: 2021-06-05 13:17 Ship Date: No Shipping		Ship now Mark as shipped View details Pending More actions
25 ¥		Upgrade to Express Shipping USD 28 [Sent]									1 Records	< Prev 1 Next	

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

	H	L L	
	1) × 1	5
Original Message	Subtotal:		
Hello, this is the tracking number EP	Shipping:		1
	Total:	U	SD
Please check her after 2-3 days, The parcel still in processing from Japan post, Thank you.			
2021-09-27 12:46:41	Message ID: 21111 Packag	e Information	
Your reply	Shipping St	rvices: Ship Date:	
	Tracking N	umber:	
	- 		
	Злір ю. Уштана	Im	
	9	, CA, United States	۶,
Your reply: 🕢	Post Code:	9	
	Status: Pa	d	
Select Message Template	Add a Template Tag 🗸 🖸	0	
Message content	Additional	Involces: PC)	^
	Upgrade to	Express Shipping	(

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



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