

# 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**



**CRM TOOLS**

- CRM Settings
- Customer Message
- Dispute Case Handling

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- Refund Management
- PayPal Invoice Management**

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- Performance Reporting

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- Message Automation >
- Message Settings >

You can view all PayPal invoices sent via SoldEazy

PayPal Invoice Help

Invoice ID  Buyer ID  Buyer Email

Status  Created At

[Search](#) [Reset](#)

Buyer Name	Invoice Email Address	Descriptions	Amount	Created At	Paid At	Status	
Y****, Y**** O****@members.ebay.com ( e**** )	t****@yahoo.com.hk	Upgrade to Express Shipping	USD 28	2021-09-15 19:49	-	Sent	<a>🔍</a> <a>🔄</a> <a>🗑️</a> <a>📄</a> <a>📧</a> <a>📧</a>
-	s****	Additional purchased item	USD 1	2021-07-05 16:19	-	Cancelled	<a>🔍</a> <a>🔄</a> <a>🗑️</a>
-	p****@soldeasy.com	Extra handling cost	USD 0.1	2021-07-05 16:18	-	Cancelled	<a>🔍</a> <a>🔄</a> <a>🗑️</a>
****, N**** O****@members.ebay.com ( r**** )	p****@****.in	Test 123 中文	USD 0.9	2021-07-05 16:17	-	Cancelled	<a>🔍</a> <a>🔄</a> <a>🗑️</a> <a>📄</a> <a>📧</a> <a>📧</a>
M****, N**** O****@members.ebay.com ( r**** )	p****	Upgrade to Express Shipping	USD 0.1	2021-07-05 16:17	-	Sent	<a>🔍</a> <a>🔄</a> <a>🗑️</a> <a>📄</a> <a>📧</a> <a>📧</a>
****, N**** Invalid Request ( r**** )	p****.in	Change item extra cost	USD 0.9	2021-07-05 16:16	-	Sent	<a>🔍</a> <a>🔄</a> <a>🗑️</a> <a>📄</a> <a>📧</a> <a>📧</a>
A****, A**** @members.ebay.com ( a**** )	p****	Test	AUD 0.1	2021-07-05 16:12	-	Sent	<a>🔍</a> <a>🔄</a> <a>🗑️</a> <a>📄</a> <a>📧</a> <a>📧</a>
B****, B**** @members.ebay.com ( b**** )	p****@****.com	Postage extra cost	HKD 0.01	2021-07-05 16:04	-	Sent	<a>🔍</a> <a>🔄</a> <a>🗑️</a> <a>📄</a> <a>📧</a> <a>📧</a>
E****, E**** @members.ebay.com ( e**** )	p****.in	Upgrade to Express Shipping	USD 0.01	2021-07-05 16:03	-	Sent	<a>🔍</a> <a>🔄</a> <a>🗑️</a> <a>📄</a> <a>📧</a> <a>📧</a>

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You can use action buttons on each invoice



1



2



3



4



5



6

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

### Paid At

-

Sent

### Sent To

t[REDACTED]1@yahoo.com.hk

### Channel ID

e[REDACTED]2

### Descriptions

Upgrade to Express Shipping

### Amount

USD 28



### Sent From

al[REDACTED]8

### Invoice NO. ( Invoice ID )

0[REDACTED]3 ( I[REDACTED] )



Exit

\* 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/#xxxxxxxxxx

4. Go to Order: Click to open a new tab page to view relevant order

Ref	Order ID	Title / SKU	Total Amount	Channel	Payment	Country	Buyer Msg/Int.Remark	Stock level	Order Status	Date	Package	Action
1	31700008	Platform Order ID: 0 (Economy Shipping from outside US) SKU: [redacted] Price: USD 59.9 Datasheet: [redacted] Buyer: [redacted]	X 1 USD 83.29	ebay	PayPal	USA		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

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

*Original Message*

Hello, this is the tracking number [redacted]

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: 21001

**Your reply**

**Your reply:**

Select Message Template  Add a Template Tag

Message content

Subtotal: 59.9  
Shipping: 18.00  
Total: USD 77.9

**Package Information**

Shipping Services:  Ship Date:

Tracking Number:

Ship To:  
[redacted]  
2500 N. California Boulevard, Suite 100,  
San Jose, CA, United States  
Post Code: 95131-1100

**Status: Paid**

**Additional Invoices:** Upgrade to Express Shipping USD 28.00 [SENT]

On bottom right is this additional invoice.

3. Staff Workload and Performance reporting

Go to **CRM > Performance Reporting**

**CRM TOOLS**

- CRM Settings
- Customer Message
- Dispute Case Handling

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- Refund Management
- PayPal Invoice Management

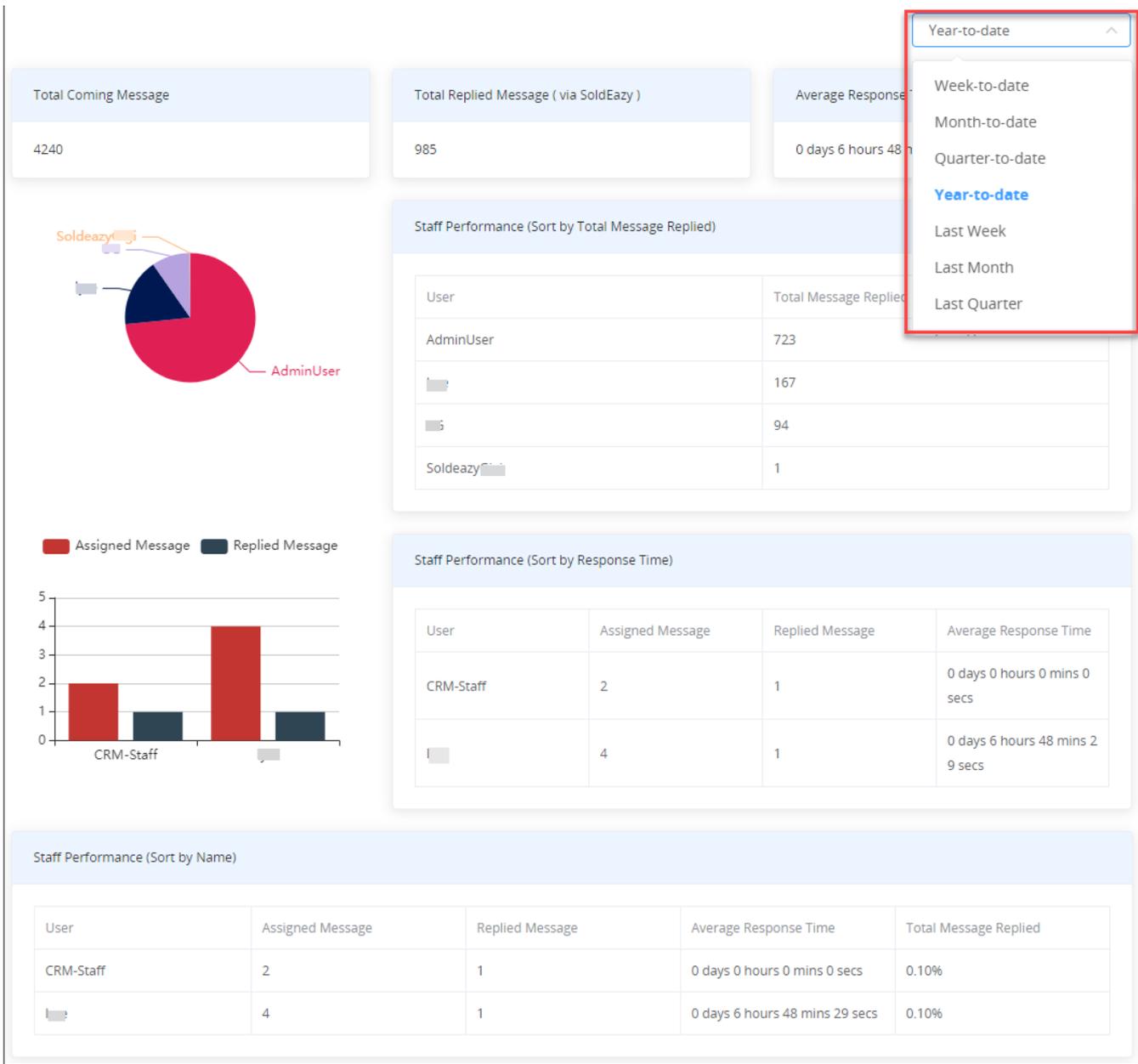
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- Performance Reporting**

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- Message Automation >
- Message Settings >

Choose a period and view staff workload and performance



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