

# 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

---

- Refund Management
- PayPal Invoice Management**

---

- Performance Reporting

---

- 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 href="#">🔄</a> <a href="#">🗑️</a> <a href="#">📄</a> <a href="#">🔍</a> <a href="#">📧</a>
-	s****	Additional purchased item	USD 1	2021-07-05 16:19	-	Cancelled	<a href="#">🔄</a> <a href="#">🗑️</a> <a href="#">📄</a>
-	p****@soldeasy.com	Extra handling cost	USD 0.1	2021-07-05 16:18	-	Cancelled	<a href="#">🔄</a> <a href="#">🗑️</a> <a href="#">📄</a>
****, N**** O****@members.ebay.com ( r**** )	p****@****.in	Test 123 中文	USD 0.9	2021-07-05 16:17	-	Cancelled	<a href="#">🔄</a> <a href="#">🗑️</a> <a href="#">📄</a> <a href="#">🔍</a> <a href="#">📧</a>
M****, M**** O****@members.ebay.com ( r**** )	p****	Upgrade to Express Shipping	USD 0.1	2021-07-05 16:17	-	Sent	<a href="#">🔄</a> <a href="#">🗑️</a> <a href="#">📄</a> <a href="#">🔍</a> <a href="#">📧</a>
****, N**** Invalid Request ( r**** )	p****@****.in	Change item extra cost	USD 0.9	2021-07-05 16:16	-	Sent	<a href="#">🔄</a> <a href="#">🗑️</a> <a href="#">📄</a> <a href="#">🔍</a> <a href="#">📧</a>
A****, A**** @members.ebay.com ( a**** )	p****	Test	AUD 0.1	2021-07-05 16:12	-	Sent	<a href="#">🔄</a> <a href="#">🗑️</a> <a href="#">📄</a> <a href="#">🔍</a> <a href="#">📧</a>
B****, B**** @members.ebay.com ( c**** )	p****@soldeasy.com	Postage extra cost	HKD 0.01	2021-07-05 16:04	-	Sent	<a href="#">🔄</a> <a href="#">🗑️</a> <a href="#">📄</a> <a href="#">🔍</a> <a href="#">📧</a>
E****, E**** @members.ebay.com ( e**** )	p****@****.in	Upgrade to Express Shipping	USD 0.01	2021-07-05 16:03	-	Sent	<a href="#">🔄</a> <a href="#">🗑️</a> <a href="#">📄</a> <a href="#">🔍</a> <a href="#">📧</a>

17 Records < Prev 1 Next >

Copyright © Holistic Technology Company Limited. All rights reserved | [Privacy](#) | [About Us](#) | [Contact Us](#)

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



**CRM TOOLS**

- CRM Settings
- Customer Message
- Dispute Case Handling

---

- Refund Management
- PayPal Invoice Management

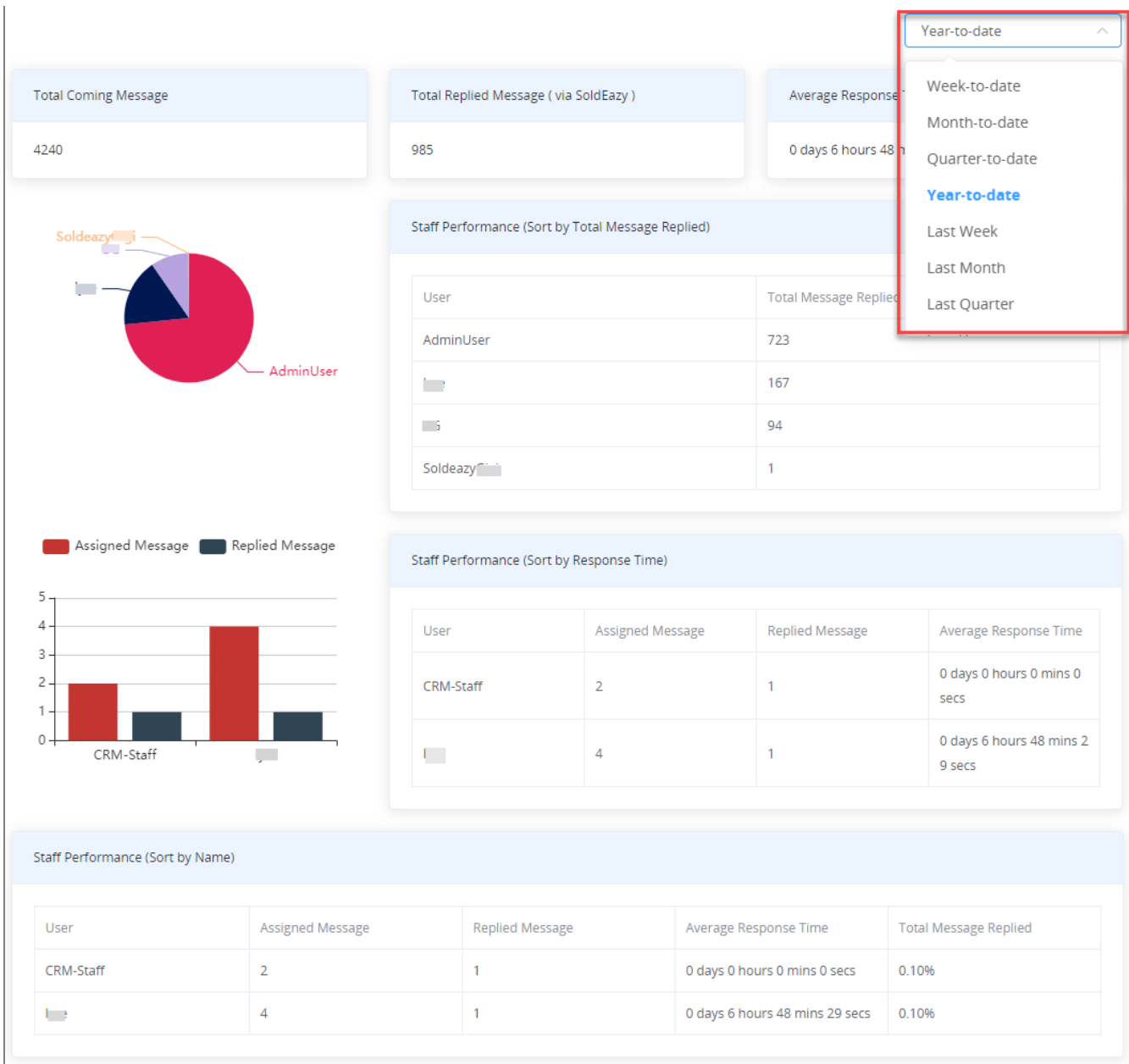
---

- Performance Reporting**

---

- Message Automation >
- Message Settings >

Choose a period and view staff workload and performance



\*\*\*Fin\*\*\*

//