

# 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 refund requests raised by CRM staff and approve/reject requests.

Refund Management Help

25 ▾ 29 Records < Prev 1 2 Next >

idx	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	Five... SKU: 0...	ebay k...		Shipping Discount	USD 73.9	USD 5	Order: 2021-10-29 Ship: 2021-11-02 Request: 2021-11-05 Review:	This buyer is a repeat buyer, we agreed to give him 5 USD as shipping discount	Awaiting Approval	More Actions ▾ View Request Details View Message Details Approve / Reject Pending Mark Refunded Add Remark
2	Type: Full Refund Source: eBay Resolution By: eBay Return	Car... SKU: 0...	ebay ul...		Buyer Cancel	GBP 0	GBP 110	Order: 2021-10-25 Ship: 2021-10-26 Request: 2021-11-03 Review: 2021-11-03		Refund Failed	

2. Paypal Invoice Management  
Go to CRM > PayPal Invoice 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	
-	s****	Additional purchased item	USD 1	2021-07-05 16:19	-	Cancelled	
-	p****@soldeasy.com	Extra handling cost	USD 0.1	2021-07-05 16:18	-	Cancelled	
****, N**** O****@members.ebay.com ( r**** )	p****@****.in	Test 123 中文	USD 0.9	2021-07-05 16:17	-	Cancelled	
M****, N**** O****@members.ebay.com ( r**** )	p****@****.in	Upgrade to Express Shipping	USD 0.1	2021-07-05 16:17	-	Sent	
****, N**** Invalid Request ( r**** )	p****@****.in	Change item extra cost	USD 0.9	2021-07-05 16:16	-	Sent	
A****, A**** @members.ebay.com ( a**** )	p****@****.in	Test	AUD 0.1	2021-07-05 16:12	-	Sent	
B****, B**** @members.ebay.com ( c**** )	p****@soldeasy.com	Postage extra cost	HKD 0.01	2021-07-05 16:04	-	Sent	
E****, E**** @members.ebay.com ( e**** )	p****@****.in	Upgrade to Express Shipping	USD 0.01	2021-07-05 16:03	-	Sent	

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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



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- Refund Management
- PayPal Invoice Management

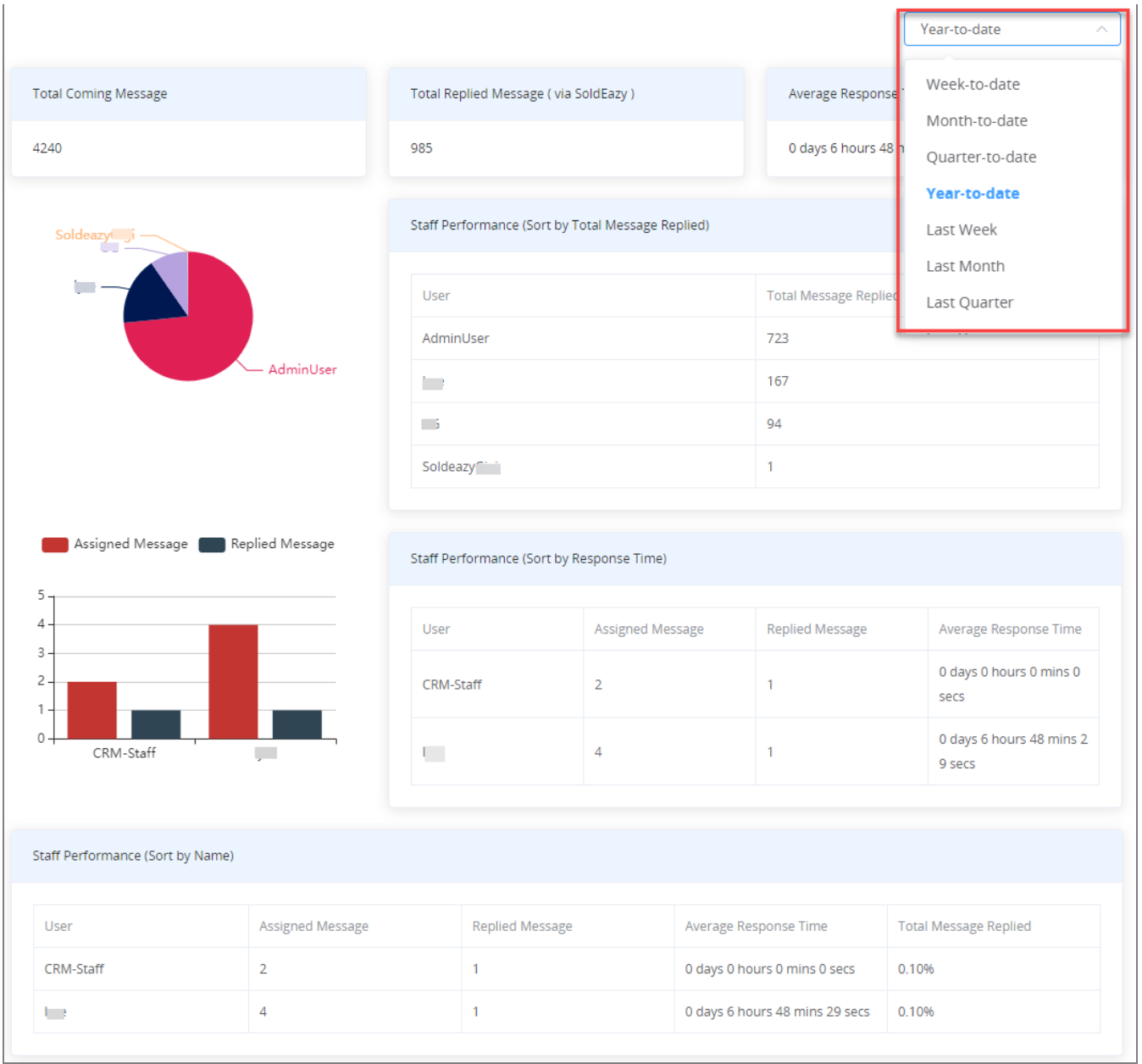
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- Performance Reporting**

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- Message Automation >
- Message Settings >

Choose a period and view staff workload and performance



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