

CRM - Settings

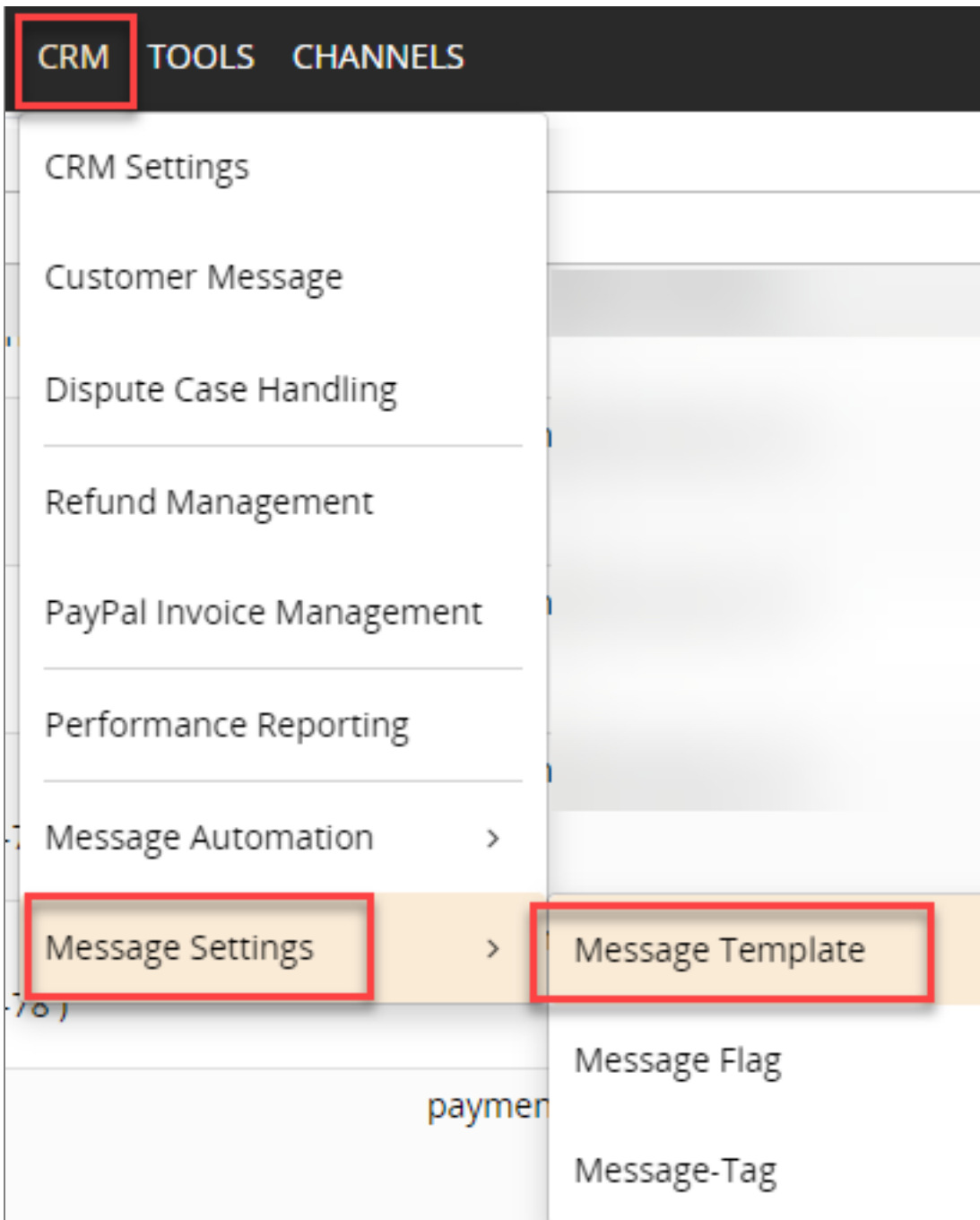
??ID??: 915 | ??: ??? | ??: Fri, Nov 5, 2021 6:33 PM

CRM - Settings

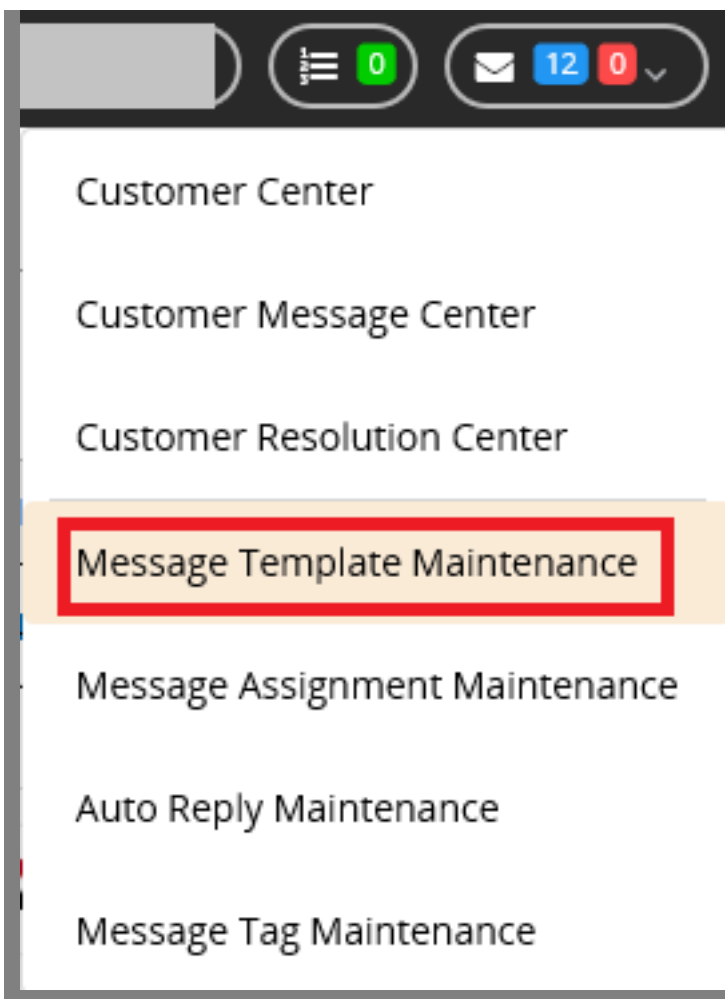
1. [Message Template](#)
2. [Automation Rule](#)
3. [Message Flag & Tag](#)
4. [Top-up Translation Credits](#)

1. Message Template

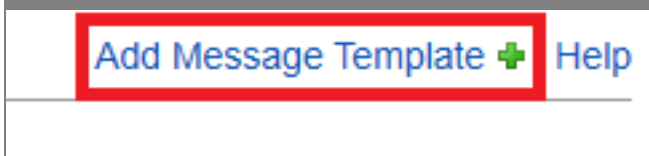
Go to **CRM > Message Settings > Message Template**



Or you can also go to **Customer Management Icon > Message Template Maintenance**



Click the <Add Message Template>



[Tips] Fill in the message template title and content, the user can use <Template Tag> to quote their store name, buyer's eBay account name, order ID or other information. < Template Tag > appear in the template with three-layer curly bracket format.

Customer Message Template



Message Template Name

Your order has been shipped



Message Template Content ?

Add a Template Tag ?

Dear {{{Customer eBay ID}}}
Thank you for purchasing our products!
Your order {{{Order ID}}} has been shipped out.
Should you have any queries, please do not hesitate to contact us.
Yours{{{Shop Name}}}

Save

Close

Click <Save> to save the message template. If you want to review, view or delete the message template, you can use the provided function button.

2. Automation Rule

1) Assign to staff automatically

Go to

Customer Management Icon >

Message

Assignment Maintenance

IKD 7.7539



0



12

0



Customer Center

Customer Message Center

Customer Resolution Center

Message Template Maintenance

Message Assignment Maintenance

Auto Reply Maintenance

Message Tag Maintenance

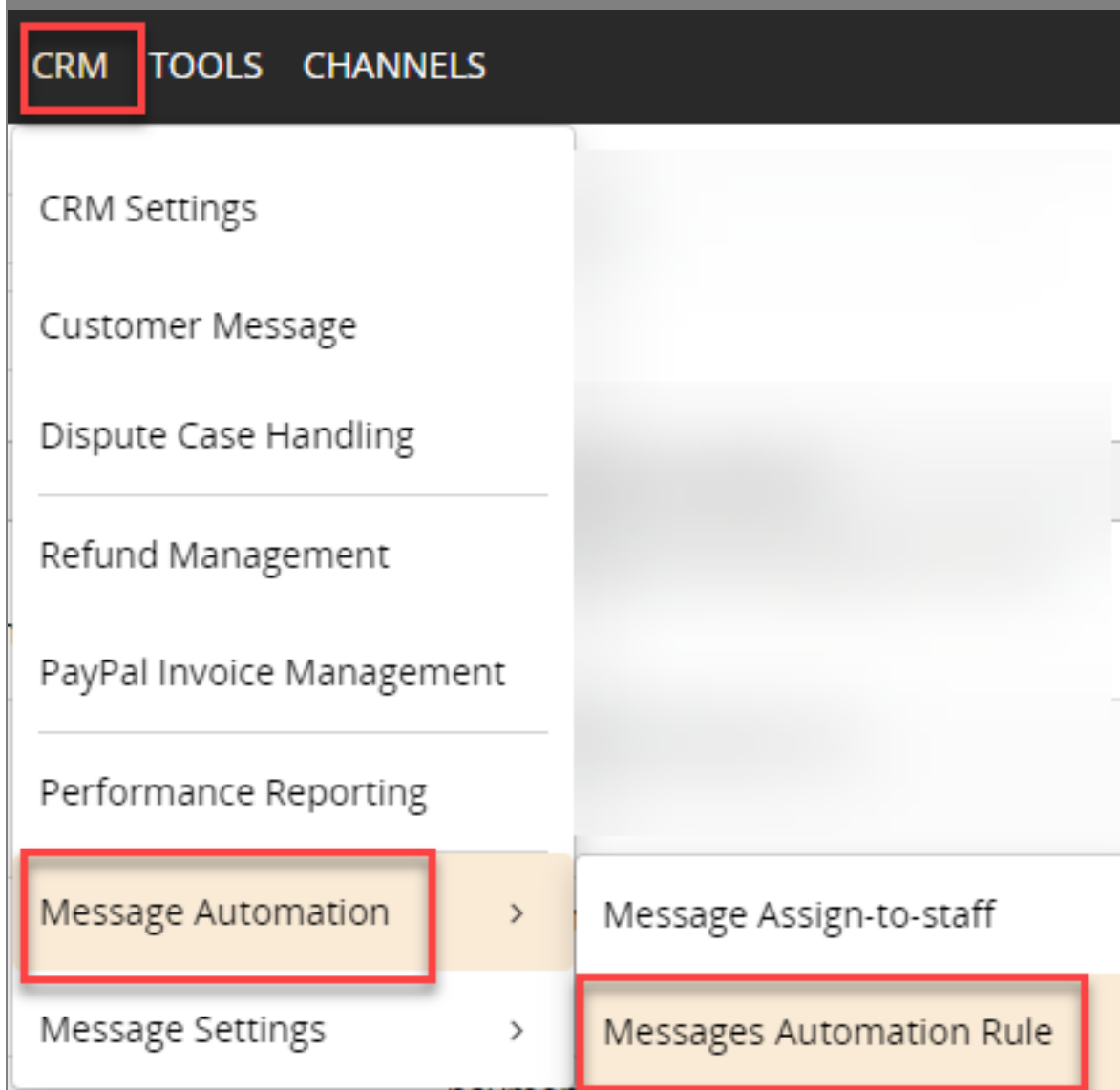
eg? When receiving a platform message that complies with

the rules, the message is < Assign the following staff sub-accounts as the person in charge of processing messages >

5. Assign to Staff: Click to choose the staff sub-account to be added. It can add more than one person.
6. Select staff sub-account: Click to choose the staff sub-account . You can click it again to cancel the choice

2) Reply to messages automatically

Go to CRM > Message Automation > Messages Automation Rule



Or you can also go to **Customer Management Icon > Auto Reply Maintenance**

0

12

0

Customer Center

Customer Message Center

Customer Resolution Center

Message Template Maintenance

Message Assignment Maintenance

Auto Reply Maintenance

Message Tag Maintenance

You can view existing message reply rules

Customize Rules Management (Send ebay message to buyer)

Add + | Help

Rule Type

On Message Arrival

Action

Send ebay message to

Is Valid

Status

Search

Reset

#	Rule Name	Rule Type	Criteria	Actions	Is Valid	Status	Actions
1	Christmas auto-reply	On Message Arrival	Match All Following Criteria - Receive Date After 2019-12-24 - eBay ID Matches PM	Send ebay message to buyer	Valid	Off	

Or create new rules

Rule (Auto Reply Message)

1

Rule Type

On Message Arrival

Rule Name

2

new_rule_1595237174163

Add Remark

On/Off

1

On

Criteria Matching Logic

Match All Following Criteria

Criteria

3

Receive Date

After

2020-07-20

Add Remark

eBay ID

Matches

PM

Add Remark

4

Action

Auto Reply Message

5

6

7

8

Save

Close

Action

Add Remark

Auto Reply Message

Reply Content

?

Add a Template Tag

?

Load from Customer Message Template

7

Dear {{{Customer eBay ID}}}
We have received your message, our store is currently on holiday mode, we will get back to you as soon as possible,
Thanks and Regards,
{{{Shop Name}}}

Operation Instructions:

1. On/Off: Blue is On, grey is Off. When creating the new rule, the switch default value is "Off", the user should turn on manually.
2. Rule Name: The user can customize the rule name
3. Criteria? | The user can specify the conditions of the rule execution, so that the execution of the rule will be triggered only when certain conditions are met | .
eg: When the <Receive Date> of receiving platform message is <After> the date

<2020-7-20>, and the message <eBay ID> is <match> with account name<PM>, the system performs the operation

4. Action: The user can specify the action content of rule execution

eg? When receiving a platform message that complies with the rules, the system uses the content in the input box below to reply automatically.

5. Reply Content: The text used for auto-reply

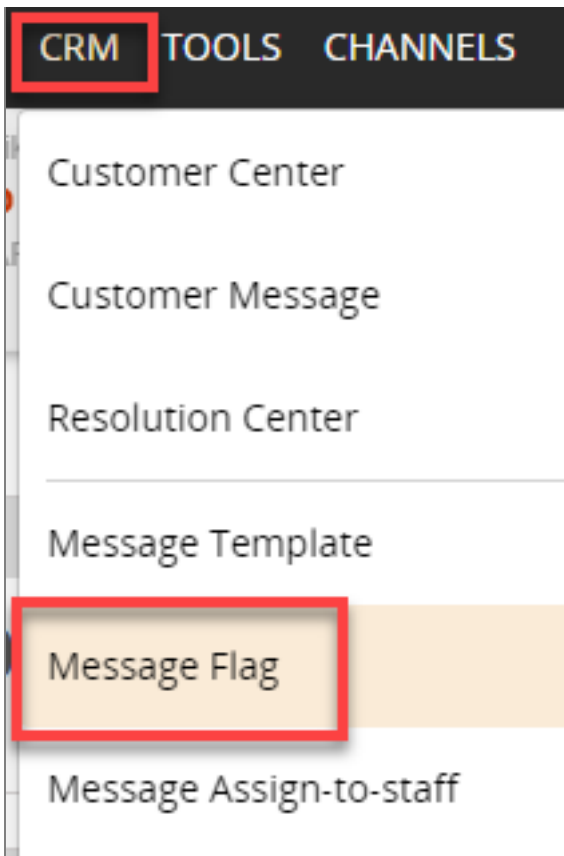
6. Add a Template Tag: The user can quote their store name, buyer's eBay account name, order ID or other information. The quoted content will appear as a three-layer curly bracket format.

7. Load from Customer Message Template? Click to select the pre-saved template in <Message Template Setting>. You can modify it after the selection.

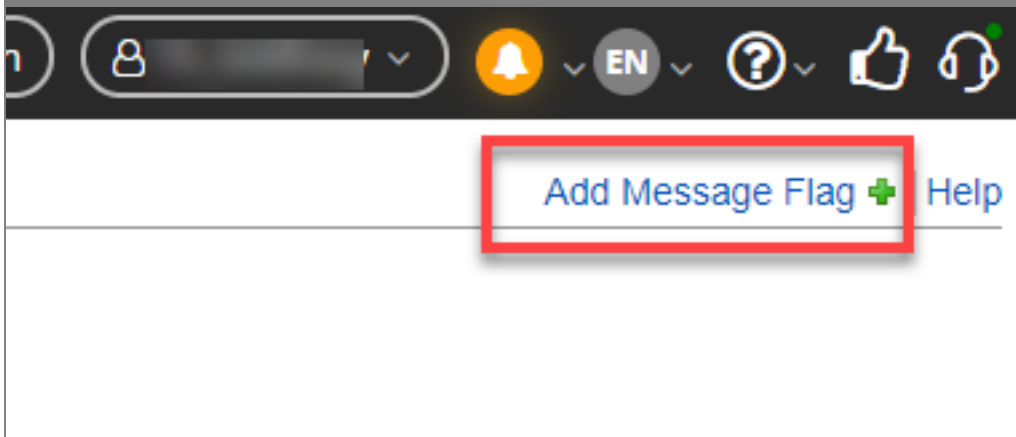
8. Save: Click it to save the rule

3. Message Flag & Tag

Go to **CRM > Message Flag**



Click <Add Message Flag>



Select Flag icon type and Flag remark, then save setting

×

Flag

Flag Icon

★ ▼

Flag Remark

Urgent

Save

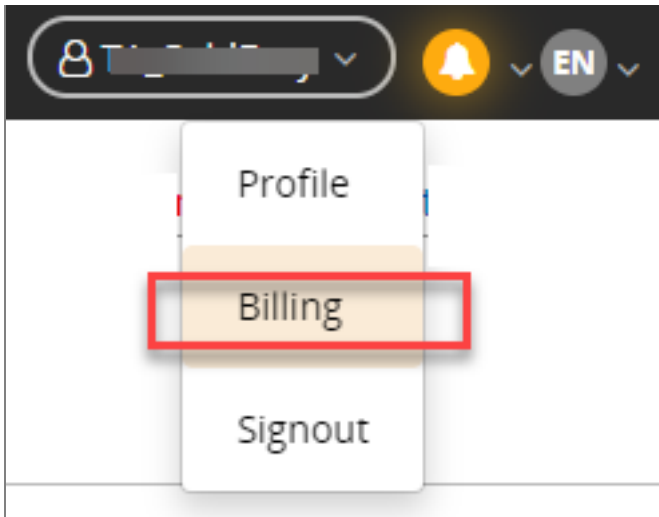
Close

Go to Customer Message Center, mouse over flag selection box to choose flag for your messages

Replied Status	Action	Flag
Open	Action ▼	▼ Default Soldeazy Testing Flag ★ Urgent
	Action ▼	

4. Top-up Translation Credits

Go to **Billing**



Go to **Translation Credits**, then click <Buy Credits>

Translation Credit

Current Balance

Price

Payment method:

9846 Characters

Price:
USD 1 for 1 credit
Machinery Translation:
1 credit for 10,000 characters.
** Price is per character sent to translate (including whitespace characters), even if the character is multiple bytes.
For example, translating "iPhone 配件" to English counts as 9 characters for the purposes of billing

1 Credit (USD 1)

Buy Credits

Click [Free Trial](#) to enjoy 10,000 characters translation quota.

** If you have added a market place account in Sales Channel, you are already qualified for our Free Trial. Free Trial Credits That Can Only Be Used Once.

*** Disclaimer: This translation function is provided by computer machine without human intervention. SoldEasy only served to transmit text to machine, and getting back of the translated text. User must note and accept that the translated text could be erroneous in terms of grammar, spelling or meaning for the selling purpose. Users are advised to proof read the whole content before release to protect its own interest. SoldEasy will not be liable for any loss or damage arising from any inaccuracies or omissions.

Fin

//

???: Holistic Tech - Mon, Oct 4, 2021 6:08 PM. ?????? 6387 ?

??URL: <https://www.soldeazy.com/support/article.php?id=915>