

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**

CRM

TOOLS

CRM Settings

Customer Message

Dispute Case Handling

Refund Management

PayPal Invoice Management

Performance Reporting

Message Automation >

Message Settings >

You can view refund requests raised by CRM staff and approve/reject requests.

Refund Management

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

2. Paypal Invoice Management

Go to CRM > PayPal Invoice Management

CRM TOOLS

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You can view all PayPal invoices sent via SoldEazy

PayPal Invoice

Help

Invoice ID

Buyer ID

















































Buyer Email

Status

Created At

Search

Reset

25	Buyer Name	Invoice Email Address	Descriptions	Amount	Created At	Paid At	Status	
1	Y*****Y***** O*****@members.ebay.com (e*****)	t*****@yahoo.com.hk	Upgrade to Express Shipping	USD 28	2021-09-15 19:49	-	Sent	     
2	-	s*****n	Additional purchased item	USD 1	2021-07-05 16:19	-	Cancelled	  
3	-	p*****n	Extra handling cost	USD 0.1	2021-07-05 16:18	-	Cancelled	  
4	*****N***** O*****@members.ebay.com (r*****)	p*****n	Test 123 中文	USD 0.9	2021-07-05 16:17	-	Cancelled	     
5	M*****N***** O*****@members.ebay.com (r*****)	p*****n	Upgrade to Express Shipping	USD 0.1	2021-07-05 16:17	-	Sent	     
6	*****N***** Invalid Request (r*****)	s*****n	Change item extra cost	USD 0.9	2021-07-05 16:16	-	Sent	     
7	A*****A***** A*****@members.ebay.com (a*****)	p*****n	Test	AUD 0.1	2021-07-05 16:12	-	Sent	     
8	B*****B***** A*****@members.ebay.com (a*****)	p*****n	Postage extra cost	HKD 0.01	2021-07-05 16:04	-	Sent	     
9	E*****E***** A*****@members.ebay.com (a*****)	p*****n	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. 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 (II[REDACTED]J)



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	309094	<div><div>Product Name: [Redacted] Price: USD \$9.9 Dataset: [Redacted]</div><div>SKU: [Redacted]</div><div>Platform Order ID: [Redacted] (Economy Shipping from outside US)</div><div>Buyer: [Redacted]</div><div><div>Additional Invoice:</div><div>Upgrade to Express Shipping USD 28 [Sent]</div></div></div>	X1 USD 83.29	ebay	Pay	USA	[Redacted]	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

[illegible]

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

Refund Management

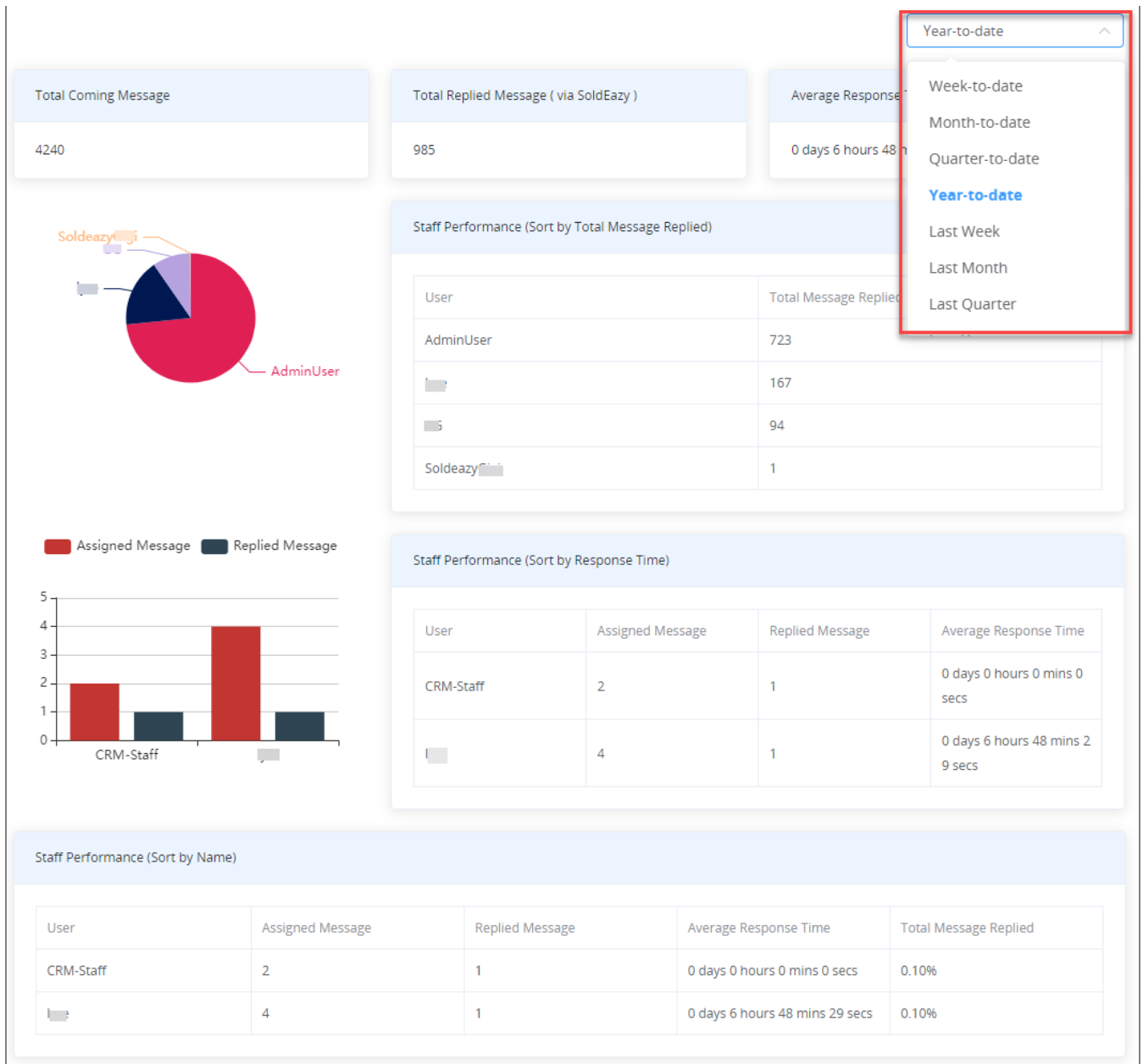
PayPal Invoice Management

Performance Reporting

Message Automation >

Message Settings >

Choose a period and view staff workload and performance



Year-to-date

Week-to-date

Month-to-date

Quarter-to-date

Year-to-date

Last Week

Last Month

Last Quarter

Fin

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