CRM - Management Control

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**

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

2. Paypal Invoice Management

Go to **CRM > PayPal Invoice 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

Invoice ID		Buyer ID		Buyer Email	
Status		Created At			

Search　Reset

25 ▾

17 Records　< Prev　1　Next >

	Buyer Name	Invoice Email Address	Descriptions	Amount	Created At	Paid At	Status ⓘ						
1	Y..........,Y........n C...............@members.ebay.com (e.....)	t...........l@yahoo.com.hk	Upgrade to Express Shipping	USD 28	2021-09-15 19:49	-	Sent	☺	👁	🔗	🕐	✉	🗑
2	-	p..............	Additional purchased item	USD 1	2021-07-05 16:19	-	Cancelled	☺	👁	🔗			
3	-	p..........@..........com	Extra handling cost	USD 0.1	2021-07-05 16:18	-	Cancelled	☺	👁	🔗			
4	I............,N........s C...............@members.ebay.com (r.....)	p..............n	Test 123 中文	USD 0.9	2021-07-05 16:17	-	Cancelled	☺	👁	🔗	🕐	✉	
5	N........,M........ 0...............@members.ebay.com (r.....)	p..............	Upgrade to Express Shipping	USD 0.1	2021-07-05 16:17	-	Sent	☺	👁	🔗	🕐		🗑
6	.........,N........s Invalid Request (r.....3)	p..............n	Change Item extra cost	USD 0.9	2021-07-05 16:16	-	Sent	☺	👁	🔗	🕐	✉	🗑
7	...........,A..........i ....@members.ebay.com (a.....r)	p..............	Test	AUD 0.1	2021-07-05 16:12	-	Sent	☺	👁	🔗	🕐	✉	🗑
8	...........,B.......... ....@members.ebay.com (c.....9)	p.........@...........com	Postage extra cost	HKD 0.01	2021-07-05 16:04	-	Sent	☺	👁	🔗	🕐	✉	🗑
9	E..........,B.......... ....@members.ebay.com (d.....9)	p..............n	Upgrade to Express Shipping	USD 0.01	2021-07-05 16:03	-	Sent	☺	👁	🔗	🕐	✉	🗑

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⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛1@yahoo.com.hk

Channel ID
e⬛⬛⬛⬛362

Descriptions
Upgrade to Express Shipping

Amount
USD 28

Sent From
au⬛⬛⬛⬛⬛8

Invoice NO. (Invoice ID)
0⬛⬛⬛⬛⬛⬛⬛⬛3 (I⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛U)

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/#xxxxxxxxx

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

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

On bottom right is this additional invoice.

3. Staff Workload and Performance reporting

Go to **CRM > Performance Reporting**

CRM TOOLS

CRM Settings
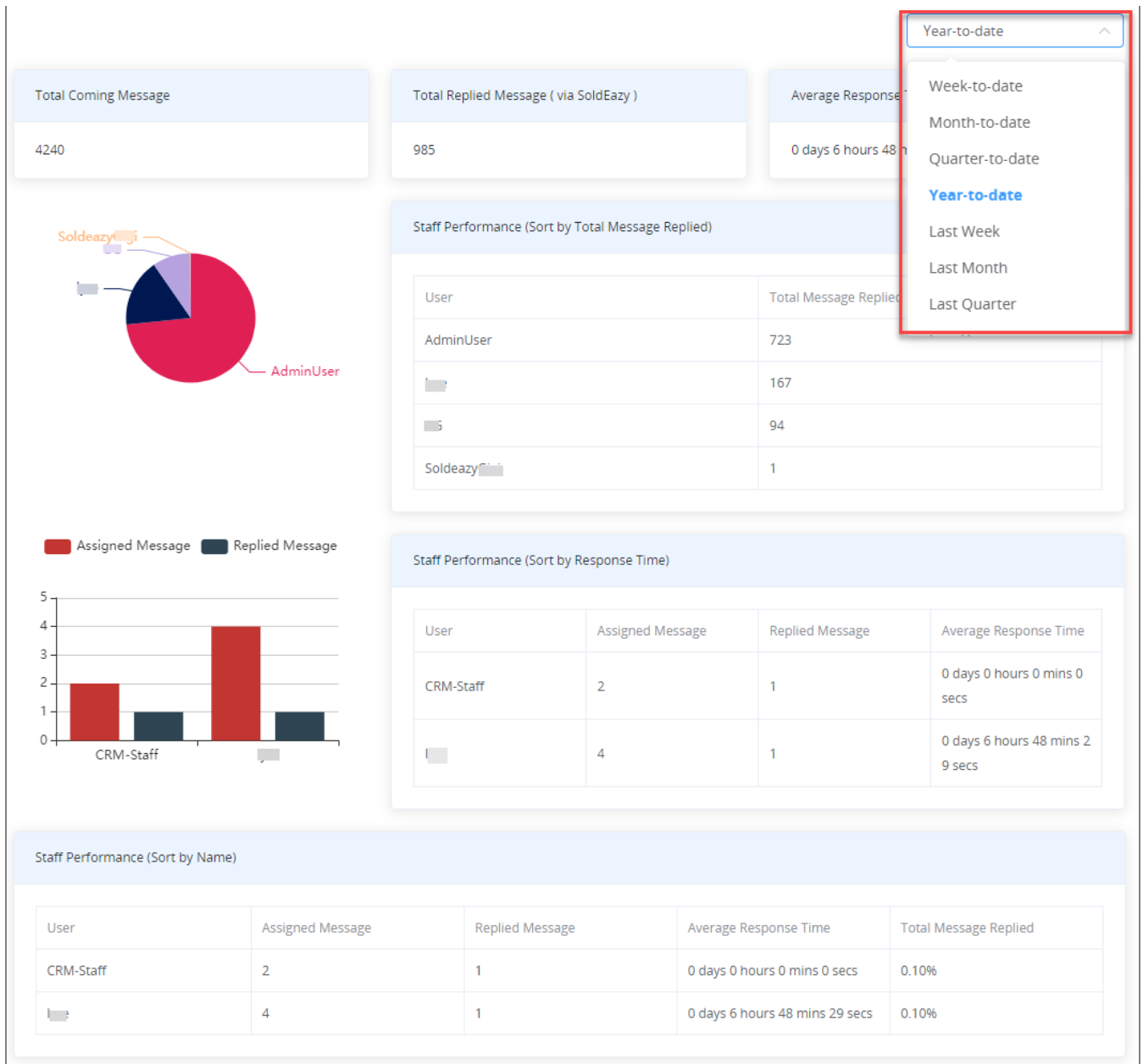
Customer Message

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Message Automation   >

Message Settings   >

Choose a period and view staff workload and performance

Total Coming Message	Total Replied Message (via SoldEazy)	Average Response
4240	985	0 days 6 hours 48 h

Year-to-date

- Week-to-date
- Month-to-date
- Quarter-to-date
- **Year-to-date**
- Last Week
- Last Month
- Last Quarter

Staff Performance (Sort by Total Message Replied)

User	Total Message Replied
AdminUser	723
	167
	94
Soldeazy	1

Assigned Message   Replied Message

Staff Performance (Sort by Response Time)

User	Assigned Message	Replied Message	Average Response Time
CRM-Staff	2	1	0 days 0 hours 0 mins 0 secs
	4	1	0 days 6 hours 48 mins 29 secs

Staff Performance (Sort by Name)

User	Assigned Message	Replied Message	Average Response Time	Total Message Replied
CRM-Staff	2	1	0 days 0 hours 0 mins 0 secs	0.10%
	4	1	0 days 6 hours 48 mins 29 secs	0.10%

Fin

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