Nextiva CRM Case Workspace

The Case Workspace allows Users to easily view and manage Case details, Relationships, Interactions, and more.

A. In the **Case** view, search and select a **Case** to view the **Case Workspace**.

B. The **Overview** tab displays necessary Case details, including Account and Contact details.

C. The **Details** tab allows Users to view and edit Case information, such as the Case number, owner, and last interaction date.

D. The **Related** tab displays all relationships associated with the Case.

E. The **Analytics** tab displays the Sentiment Trend and Customer Feedback details.

F. The **Account Activities** tab displays all Cases related to the Account.

G. Create and apply **Macros**.

H. View all recent communication on the **Interaction History** feed to the right of the Workspace.

I. Users can also create a **Note**, an **Email**, and **Log Interactions** by clicking the **Plus** (**+**) icon on the bottom-left corner of the Interaction History feed.