



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.

The screenshot displays the Nextiva CRM Case Workspace for a case titled "Password Reset". The interface is divided into several sections:

- Navigation:** A top navigation bar includes tabs for Overview (B), Details (C), Related (D), Analytics (E), Account Activities (F), and Audit log. A "Macros" dropdown menu (G) is visible on the right.
- Case Overview:** The left sidebar shows the case name "Password Reset" and a description: "Customer called in requesting help". Below this, account information is listed: "Nacho Taco" with an account value of "\$2739".
- Analytics:** The "SENTIMENT TREND" section shows a "Positive" sentiment gauge with the note "Positive language detected based on recent interaction". The "CUSTOMER FEEDBACK TREND" section displays a "4.4 stars" rating based on "89% positive ratings received based on recent survey responses".
- Recent Cases:** A list of recent cases is shown, including "Password Reset" with a status of "In Progress".
- Recent Opportunities:** A section indicating "No Opportunities associated yet." with options to "Create Opportunity" or "Add Existing Opportunity".
- Account Contacts:** A contact named "Alberto Gonzalez" is listed with email "alberto@thatsnachotaco.com" and mobile phone "4249903445".
- Interaction History:** The right-hand pane shows a feed of interactions, including a logged entry by "Kris Jacobson" on "Monday, September 30th" with the issue: "Customer called in requesting help resetting password. Steps Taken: Emailed link to reset password and verified customer can sign in a...". A plus icon (I) is visible at the bottom of the feed.