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.