



Nextiva CRM Account Workspace

The Account Workspace allows Users to easily view and manage Account information, Contact details, Interactions, and more.

- A. In the **Account** view, search and select an Account to view the **Account Workspace**.
- B. The **Overview** tab displays necessary Account information, such as account name, shipping and billing addresses, associated Contacts, and Analytics.
- C. The **Details** tab allows Users to view and edit Account information, Contact details, and address information.
- D. The **Related** tab displays all relationships associated with the Account.
- E. The **Analytics** tab displays the Sentiment Trend and Customer Feedback details.
- F. The **Audit Log** displays all changes made to the Account.
- G. View all recent communication on the **Interaction History** feed to the right of the Workspace.
- H. 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 Account Workspace for 'ABC Cleaning'. The interface is divided into several sections:

- Navigation:** A vertical sidebar on the left contains icons for Account, Contacts, and Interactions. The 'Account' icon is highlighted with a yellow box and labeled 'A'.
- Account Header:** At the top, the account name 'ABC Cleaning' is displayed, along with a 'Macros' dropdown menu.
- Tabs:** Below the header are five tabs: 'Overview' (selected), 'Details', 'Related', 'Analytics', and 'Audit log'. Each tab is labeled with a letter (B-F).
- Account Overview:** This section provides key account details:
 - Account Name: ABC Cleaning
 - Account Value: \$2773.34
 - Shipping Address: 8800 E. Chaparral Rd, AZ, 85250
 - Billing Address: 8800 E. Chaparral Rd, AZ, 85250
 - Industry: Cleaning Service
 - Employee Count: 1-50
- Analytics:** Two charts are shown:
 - Sentiment Trend:** A gauge chart showing 'Positive' sentiment, with the text 'Positive language detected based on recent interaction'.
 - Customer Feedback Trend:** A star rating chart showing '4.4 stars' and '89% positive ratings received based on recent survey responses'.
- Recent Cases (5):** A list of cases with their status:
 - Request: Update Payment Due Date (Status: Resolved)
 - Pro Recording Request (Status: Open)
- Recent Opportunities:** A section indicating 'No Opportunities associated yet.' with buttons to 'Create Opportunity' and 'Add Existing Opportunity'.
- Contacts:** A section with a 'TS' contact and a '+ Add' button.
- Interaction History:** A feed on the right side, labeled 'G', showing communication from 'Kris Jacobson':
 - Sep 18 11:39 AM: Taylor's installation is now complete. Sent welcome email.
 - Sep 18 11:40 AM: Taylor requested her payment date to be rescheduled to the 15th of each month. I made a note to update this when I get back...
 - Sep 19 1:20 PM: Rescheduled payment date to the 15th of each month.
 - Oct 11 12:32 PM: Call Taylor to see if she's happy with service.
 - Oct 11 12:35 PM: Ask Taylor for updated email address.
 - Oct 16 11:29 AM (1m7s): Issue: Customer forgot password. Resolution: Email reset link.