



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 'ABC Cleaning' account workspace. The left sidebar contains navigation icons for Account, Contacts, and Interactions. The main area is divided into three sections: Overview, Details, and Analytics. The Overview tab is active, showing account information, sentiment trend, customer feedback, recent cases, and recent opportunities. The Interaction History feed is visible on the right, showing a list of recent communications with Kris Jacobson. The bottom-left corner of the Interaction History feed features a plus (+) icon for creating new interactions.

ACCOUNT
ABC Cleaning

Overview Details Related Analytics Audit log

Account Overview

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

SENTIMENT TREND

Positive
Positive language detected based on recent interaction

CUSTOMER FEEDBACK TREND

4.4 stars
89% positive ratings received based on recent survey responses

Recent Cases (5)

- Request: Update Payment Due Date
Status: Resolved
- Pro Recording Request
Status: Open

Recent Opportunities

No Opportunities associated yet.

- Create Opportunity
- Add Existing Opportunity

Contacts

CONTACT NAME

Interaction History

- Kris Jacobson
Taylor's installation is now complete. Sent welcome email.
Sep 18 11:39 AM
- Kris Jacobson
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 18 11:40 AM
- Kris Jacobson
Rescheduled payment date to the 15th of each month.
Sep 19 1:20 PM
- Kris Jacobson
Call Taylor to see if she's happy with service.
Oct 11 12:32 PM
- Kris Jacobson
Ask Taylor for updated email address.
Oct 11 12:35 PM
- Kris Jacobson
Issue: Customer forgot password. Resolution: Email reset link.
(1m7s) Oct 16 11:29 AM