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.