NextAgency   NextCommission Solo

Features	NextAgency	NextCommission Solo
Case Management	**Yes**	**Limited**
Case Summary and Details	Yes	Yes
Employee and Dependent Details	Yes	Yes
Census Management	Yes	No
Policy Tracking	Yes	Yes
Phone Call Log	Yes	No
Pipeline View (grid by pipeline stage)	Yes	No
Commission Management	**Optional Add-On**	**Yes**
Upload from Spreadsheets	Yes	Yes
Manual Entry	Yes	Yes
Create Clients/Policies During Upload	Yes	Yes
Posting	Yes	Yes
Commission Specific Reports	Yes	Yes
Duplication Prevention	Yes	Yes
Commission Split Management	Yes	Yes
Track History	Yes	Yes
Track Variance from Expected or Prior Month	Yes	Yes
Track Commissions, Overrides, Fees and Bonuses	Yes	Yes
Sub-Agencies and Sub-Agents	**Yes**	**Yes**
Sub-Agency Records	Yes	Yes
Sub-Agent Records	Yes	Yes
Tasks and Notes	Yes	Yes
Multi-Tier Commission Splits	Yes	Yes
Standard & Custom Commission Splits	Yes	Yes
Reports	Yes	Yes
Tasks, Notes, and Tickets	**Yes**	**Sub-Agents Only**
Case-level Tasks and Notes	Yes	No
Sub-Agencies / Sub-Agent Tasks and Notes	Yes	Yes
Action Items (sub-tasks within tasks)	Yes	Yes
Timeline (personal To-Do List for each user)	Yes	No
Tickets (agency tasks unrelated to Clients)	Yes	No
Checklists (chain of tasks)	Yes	No
Automated Workflows	Yes	No
Create Tasks from Calendar	Yes	No
Duplicate, Copy and Move Tasks and Notes	Yes	No
Reports and Dashboard	**Yes**	**Limited**
Dashboard (user selected graphs and lists)	Yes	No
Cases	Yes	Yes
Contacts	Yes	No
Client Service Reports	Yes	No
Benefits/Policies	Yes	Yes
Employees/Dependents	Yes	Yes
Commissions, Overrides, Fees, and Bonuses	Yes	Yes
Commission Summaries (pivot tables)	Yes	Yes
Tasks, Tickets, and Notes	Yes	No
Sub-Agencies / Sub-Agents	Yes	Yes
Report Customization	Yes	Yes

Features	NextAgency	NextCommission Solo
Contacts	*Yes*	*Limited*
Agency-level Contacts	Yes	Yes
Case-level Contacts	Yes	Yes
Sub-Agency-level Contacts	Yes	Yes
Employee and Dependent-level Contacts	Yes	Yes
Carrier Contacts	Yes	No
General Agency Contacts	Yes	No
Vendor Contacts	Yes	No
Marketing and Communication	*Yes*	*No*
Drip Marketing Campaigns	Yes	No
Email Campaigns	Yes	No
Follow-up Reminders	Yes	No
Texting (NextText)	**Optional Add-On**	No
Email Syncing (NextMail)	Yes	No
Outlook Email Add-on	Yes	No
Library (File Management)	*Yes*	*Yes*
Agency Level Documents	Yes	Yes
Case-Level Documents	Yes	Yes
Document Preview	**Coming Soon**	**Coming Soon**
Syncing and Integrations	*Yes*	*Very Limited*
BerniePortal	Yes	Yes
Ease	Yes	Yes
Forms (e.g., Google Forms, Form Stack, Jotform)	Yes	No
Intulse VOIP Phone System	Yes	No
Office Word (Mail Merge)	Yes	No
PerfectQuote	Formatted Census Form	No
NextMail (syncs emails through IMAP)	Yes	No
Contacts Syncing (with NextMail)	Yes	No
Calendars Syncing (with NextMail)	Yes	No
Zapier	Yes	Yes
Security and Privacy	*Yes*	*Yes*
Detailed Permission (what users can do)	Yes	Yes
Specified Roles (what users can see)	Yes	Yes
Two Factor Sign-in	Yes	Yes
Automatic Log-off (agency specified time)	Yes	Yes
Restrict IP Addresses	Yes	Yes
Activity Tracking and Logs	Yes	Yes
Time Saving Administrative Tools	*Yes*	*Yes*
Bulk Imports (templates not required)	Yes	Yes
Bulk Editing	Yes	Yes
Universal Searching	Yes	Yes
Page Specific Searching	Yes	Yes
Page Specific Filters	Yes	Yes