The NextAgency Glossary

Term	Definition	Related Terms
A		
Action Items (Tasks)	A series of items that need to be completed to complete a task. Milestones or sub-tasks within a Task.	
Activities (Agency)	A log of significant actions taken by Users in your agency such as changes to renewal dates, updating contacts, etc. The Agency Activity Log shows these events for all users in connection with all Cases.	
Activities (Case)	A log of significant actions taken by Users in connection with a particular case.	
Administrative Broker	Users with no limit as to what they can view and do in NextAgency.	Users, Writing Brokers, Broker Support, Agency Support, Roles, Permissions
Agency Library	A virtual file cabinet. A directory of folders and files accessible to every User. However, specific folders in the file cabinet may be designated as private and viewable only by the creator of the folder.	
Agency Support	Users who can view all cases in NextAgency, but may be limited by Permissions as to what they can do and which tabs they can view (e.g., they may not have the permission to view the Commission tab).	Users, Administrative Brokers, Writing Brokers, Broker Support, Roles, Permissions
Archive	Archiving a record removes it from the active view, but does not delete it. This declutters your active view but keeps the archived item accessible if needed. You can view archived items by selecting Archived in the header or filter.	
Associate	An action that connects one record to another. For example, a contact as a dependent.	Disassociate, Contacts
B		
Benefits	The product sold to a client. Usually an insurance policy, but could be a financial product, administrative services, etc.	
Blue Navigation Pane	The menu of links along the left side of nearly every page providing one click access to the most frequently used pages and tools. Tucks to the side of the page by default, but may be locked open position by clicking on the lock icon.	Fast Access
Bounce Rate (Email Campaigns)	Emails not delivered in an Email Campaign. Usually the email address has changed or is misspelled	Email Campaigns, Spam Rate, Success Rate, Opened Rate
Broker Support	User who can view only cases on which the Broker to which they are assigned is associated or which they are directly associated. May be limited in what they can do or which tabs they can view on those cases.	Users, Administrative Brokers, Writing Brokers, Agency Support, Roles, Permissions
C		

Term	Definition	Related Terms
Carriers	Entities who "manufacture" policies and benefits. Used in NextAgency to describe any entity that pays your agency compensation.	
Case Library	A virtual file cabinet. A directory of folders and files pertaining to a specific case. Exists simultaneously in the Agency Library	
Cases	A catch-all term for the prospects, clients, leads and other entities you track in in NextAgency. These are listed in the Sales Status field.	Sales Status
Checklists	A way to implement your agency's procedures by creating a chain of tasks in which each task is created by the completion of a prior task. May be launched manually or by a workflow.	Tasks, Workflows
Confidence	Initially intended to Indicate your agency's expectation for closing a sale. Has come to be used to rate cases on whatever basis your agency chooses.	
Contacts	Directory of individuals whether associated with cases, carriers, GAs or other entities. Your rolodex. There is an agencywide Contacts list accessible through the Blue Navigation Bar and lists for cases, carriers, GAs, etc.	
Custom Field	User defined fields for storing data concerning benefits, cases, contacts, commissions, tasks, notes and sub-agents. May be formatted as text, numbers, currency, percentages, dates and drop down menus selections.	
Customize Columns (Reports)	A tool in all reports enabling Users to set the order in which fields will appear in reports. Reports will be sorted based on the first column.	
D		
Dashboard	A page enabling a User to quickly view and analyze data maintained in NextAgency through Tiles (mini-reports) selected by a User.	
Directory	A list of your agency's NextAgency Users along with contact information.	Contacts, Users
Disassociate	Removes an association between a contact and a record. For example, removing an employee from a group.	Associate, Contacts
E		
Email Campaigns	A tool enabling agencies to blast out emails or newsletters to selected contacts.	Success Rate, Opened Rate, Bounce Rate, Spam Rate
External Users	Users outside of your agency able to sign into NextAgency. They may only view designated tabs for cases with which they are associated. They may download their own commission statements. They cannot edit, add or delete records.	Users, Seats
F		

Term	Definition	Related Terms
Fast Access	A dropdown menu in the Blue Navigation Pane that provides quick access to pages and tools that tend to be access less frequently than items listed on their own in the Blue Navigation Pane.	Blue Navigation Pane
Filters	A tool to narrow the data set you'll see in tables and reports by selecting various fields -- including your custom fields. This helps you zero in on the information you need.	Tables
Footer	The part of a page in NextAgency that presents links to our privacy policy, help desk and other system information.	Header
Freeze Header	A means of keeping the header in view even when scrolling down on page within NextAgency. Click on the lock in the header (below your name) to freeze and unfreeze the header.	
G		
General Agents	Upstream product distributors. Also known as General Agencies and GAs. Also includes FMOs and similar marketing organizations.	
Green Question Mark	A Help Button icon (a white question mark in a green circle) located in the header on every page in NextAgency through which Users may ask for assistance from customer support.	Help Desk
H		
Header	The part of a page in NextAgency displaying filters, buttons and generic information as opposed to your agency's data.	Footer, Freeze Header
Help Desk	A library of useful articles, videos and FAQs in which you'll find answers to many of your questions. The Help Desk may be accessed by the link in the footer of pages within NextAgency.	Green Question Mark
Home Page	The page you arrive at when first opening NextAgency or when clicking on the NextX (the stylized X above the Blue Navigation Pane. Users may set their own home page in Settings -> Agency Settings -> Preferences.	Preferences
I		
Integrations	Connections between NextAgency and other software you may use (e.g., Ease, Outlook, Gmail) enabling them to share data.	
L		
Libraries	Virtual file cabinets. A directory of folders and files. In NextAgency there is an agencywide library and case-specific libraries.	Agency Library, Case Library
M		
Mapping	When setting up data imports, identifying the fields in NextAgney which correspond to the column headers (labels) in the source spreadsheet.	

Term	Definition	Related Terms
Manager	A User who leads a team of other Users. Some reports and tables may be filtered to display data related to a Manager's team.	
Market Segment	Organizes your cases based on who is paying for the benefit, an individual or organization (group).	Sales Status
N		
Notes	Something your agency needs to know about a case, benefit or other item. May be viewed in the Timeline.	Case, Benefits, Sub-Agent, Tasks, Ticket, Timeline
O		
Opened Rate (Email Campaigns)	The number of emails sent through an Email Campaign that are opened by recipients. A sub-set of the Success Rate.	Email Campaigns, Success Rate, Spam Rate, Bounce Rate
P		
Permissions	Restrictions on what Records Users may view, edit, add or delete in NextAgency. Administrative Brokers have unlimited permissions. Other Users may have limits imposed.	Roles, Users
Policy Stage	Indicates whether the policy is active, lapsed or is in any other status your agency defines.	Policy Status
Policy Status	Indicates whether the policy has ended (Past), is in-force (Current), or sold, but not yet active (Future).	Policy Stage
Preferences	Aspects of NextAgency you may customize to your liking. E.g., phone number formats, notifications concerning tasks, your home page. Some preferences are personal to you; others apply to the agency.	
R		
Ref #	A unique number assigned by NextAgency to notes, tasks and tickets to make it easier to find, retrieve and share these items.	Notes, Tasks, Tickets
Roles (Case Context)	A contact's relationship to a case (e.g., owner, accountant, office manager, etc.). These roles are defined by your agency.	Case, Contacts
Roles (Team Context)	A User's relationship to a case. E.g., lead, account executive, support staff, etc.) These roles are defined by your agency.	Case
Roles (User Context)	Determines which cases your users may view and whether there are limits can be placed on what they can do	Permissions, Users, Administrative Broker, Writing Broker, Agency Support, Broker Support
S		

Term	Definition	Related Terms
Sales Stage	Defines what is happening with a Case. When grouped together these stages become one or more pipelines. A number of Sales Statuses are provided by default, you may rename these or create your own.	Sales Status
Sales Status	Defines your relationship with the case. By default your cases are labeled Clients or Prospects. However, you may create your own Sales Statuses.	Sales Stage
Seats	Subscription fees are determined by the number of seats you choose in Settings-> Billings. Users are those who fill these Seats. An agency may have more Seats than Users, but not more Users than Seats.	Users
Spam Rate (Email Campaigns)	Emails marked as spam by the recipient of the email in an Email Campaign or by the recipient's email system.	Email Campaigns, Success Rate, Opened Rate, Bounce Rate
Splits	The portion of compensation paid to a sub-agent. May be fixed, a percentage, or on a PEPM basis	Commissions, Sub-Agents
Sub-Agencies	A downstream organization, usually an agency with which you split commissions. Sub-Agents may place business under their own name or with a sub-agency.	Splits, Sub-Agents
Sub-Agents	A downstream agent. Usually someone with whom you split commissions.	Splits, Sub-Agencies
Success Rate (Email Campaigns)	The number of emails successfully delivered, but not necessarily opened, through an Email Campaign.	Email Campaigns, Opened Rate, Spam Rate, Opened Rate
Synced Contacts	Those contacts in NextAgency added to Contacts by a data transfer from your email client (e.g., Outlook, Gmail).	Contacts
T		
Tables	NextAgency presents your data in tables with rows and columns. On many pages you can select the columns used in the table by clicking on the gear in the header. May also be referred to as your "view."	
Tags	A way to associate multiple items or to indicate relationships between records. For example, subsidiaries to a parent company. Can be used in filters and included in many reports	Reports, Filters
Tasks	Something someone need to do for a case or sub-agent. May be created by checklists or workflows May be displayed in the Timeline.	Case, Sub-Agent, Note, Ticket, Workflows, Checklists, Timeline
Teams	A group of users assigned to a case. Teams may be created on an ad hoc basis or established as a set group of individuals who can be assigned to a case as one unit.	Users

Term	Definition	Related Terms
Tickets	Tasks (or notes) not associated with a case or sub-agent, but concerning the agency (e.g., ordering supplies, team meetings). May be displayed in the Timeline.	Notes, Tasks, Timeline
Timeline	A personalized "to do" list showing tasks, notes and tickets created by or assigned to the user	Notes, Tasks, Tickets
Tooltips	Helpful information or explanations specifically about the field or link to which they are attached. You can access tooltips by hovering your mouse over the "?" in the dark blue circle next to the field.	
Trigger	The event that launches an automated workflow such as an effective date, renewal date, birthday, change in sales status or any of over two dozen events.	Workflows
U		
Users	Individuals in your agency who are have credentials to sign into NextAgency. What they can see in NextAgency is defined by their Role. What they can do is defined by Permissions. Subscription fees are based on Seats, not Users.	Seats. Roles, Permissions. Administrative Broker, Writing Broker, Agency Support, Broker Support, External User, Seats
V		
Vendors	A list of outside companies your agency works. This might include attorneys, accountants, payroll companies, IT support. Does not usually include carrier and general agency personnel.	
W		
Workflows	An automated process that creates tasks or emails or launches checklists based on a triggering event. Triggers may be a client's effective date, a change in status or of more than two dozen included events.	Tasks, Emails, Checklists, Triggers
Writing Broker	Users who can view only cases on which they are the broker or to which they are assigned. They may be limited as to what they can do to the case or which tabs they may view (e.g., they be unable to view the Commissions tab).	Users, Administrative Brokers, Writing Brokers, Broker Support, Agency Support, Roles, Permissions