

Routing That Runs Itself

Set your routing rules once, then move agents by changing one tag instead of editing every queue. This guide covers the four tools that make that possible, **Tags**, **Priorities**, **Schedules**, and **Dynamic Call Caps**, plus **Bulk Edit**, which applies them at scale.

Why this matters

During AEP, routing changes happen in real time, and every slow change costs money. Say a performance review moves six agents from Tier 1 to Tier 2 and you run 20 queues. Done by hand, that is six agents × 20 queues × 2 edits (remove, then add): **about 240 edits**, made while calls are ringing.

Tags fix that. A queue that includes agents by tag updates its own membership whenever an agent's tag changes. The same move becomes **six edits**, one tag change per agent, and the queues never need touching.

Tags × Bulk Edit: the savings multiply

Tags and Bulk Edit each remove a layer of work, and together they remove almost all of it. Take the setup in this guide's screenshots: 8 agents into 4 Tier 1 queues.

Method	How the work scales	8 agents × 4 queues	50 agents × 20 queues
Manual	Every agent added to every queue (agents × queues)	32 changes	1,000 changes
Tags only	Tag each agent once, give each queue one rule (agents + queues)	12 changes	70 changes
Tags + Bulk Edit	Tag all agents at once, add the rule to all queues at once	2 actions	2 actions

The bigger your floor, the bigger the gap. Tags turn a multiplication into an addition, and Bulk Edit turns that addition into two clicks' worth of work. EnrollHere is built for how agencies actually operate: the time an admin spends in settings is time not spent running the floor.

Bulk Edit reaches well beyond tags. On the Queues list, select any number of queues and change, in one pass:

- Receiver Agents (add or remove by agent tag)

- Delay Settings
- Billable Settings, Duplicate Billable Settings, and Missed Billable Settings
- Script Settings
- Compliance Scrub Settings
- Blocked Lead Lists
- Enrollment Code Status Settings
- Enable / Disable Queues

In **Management → Users**, Bulk edit adds tags to every selected agent at once.

Every routing decision in this guide answers one of three questions:

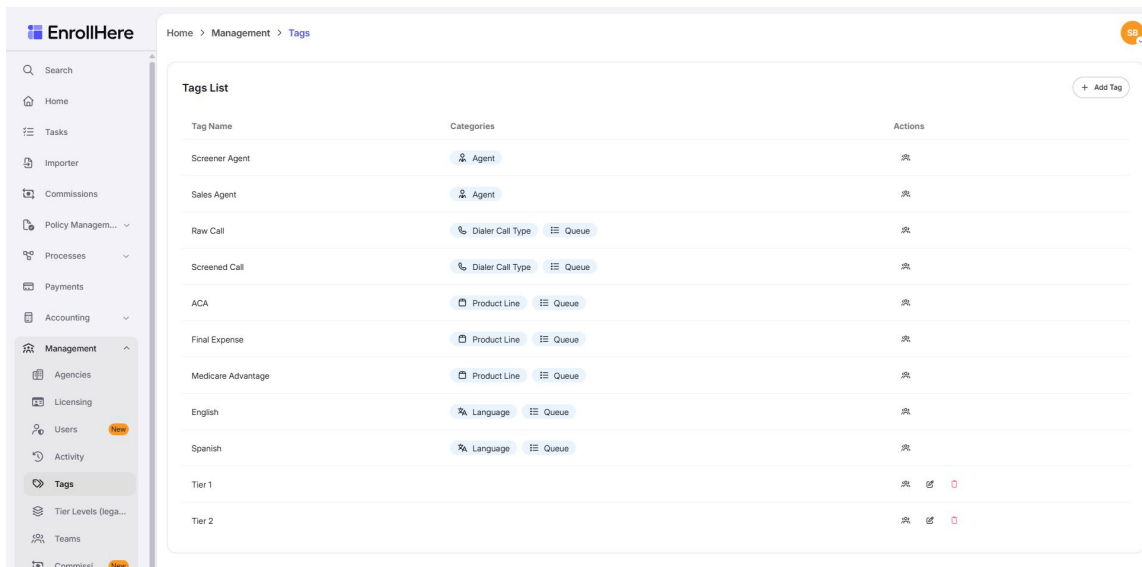
Question	Tool	What you control
Who takes the calls?	Tags + Priority	Which agents are eligible for which queues, and in what priority order
When do they take them?	Schedules	Priority and delay by time of day
How much can they spend?	Dynamic Call Caps	A billable-call cap that only converting agents can get past

1. Tags: describe your agents once

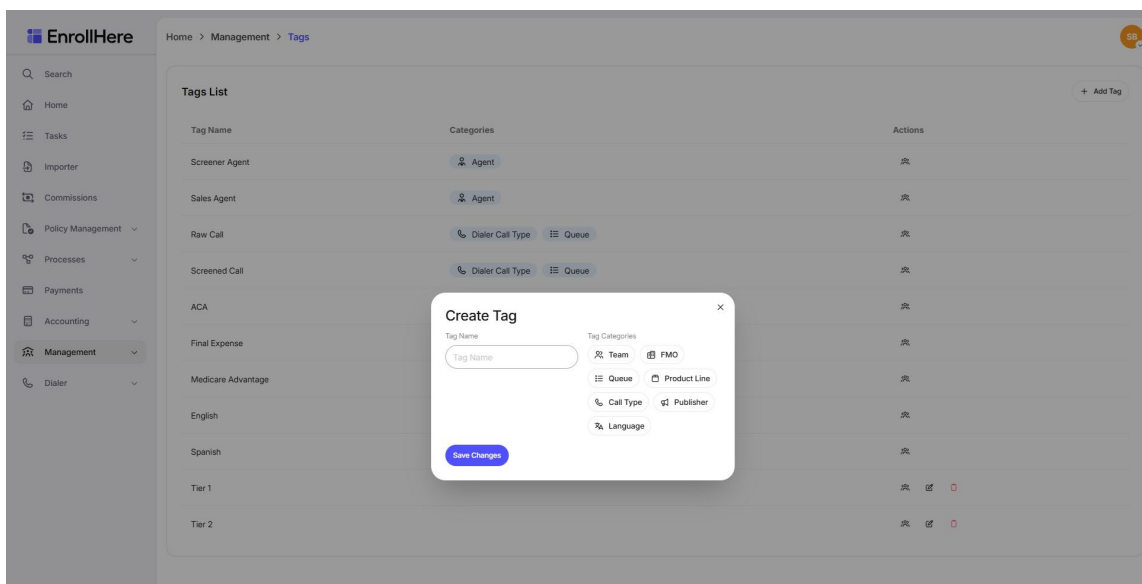
Without tags, every queue keeps its own list of agents. Twelve agents across twenty queues means twenty lists to keep up to date. With tags, you label each agent once (say, Tier 1), and each queue holds a rule instead of a list: "anyone tagged Tier 1." Change an agent's tag, and every queue using that rule follows.

Create a tag

1. Inside the Main Application, go to **Management → Tags** and click **Add Tag**.
2. Enter a **Tag Name**, for example Tier 1.
3. Optionally pick a **Tag Category**: Team, FMO, Queue, Product Line, Call Type, Publisher, or Language. The Tier 1 and Tier 2 tags below have no category.
4. Click **Save Changes**.



Management → Tags. Tier 1 and Tier 2 sit alongside built-in tags such as Sales Agent and Spanish.

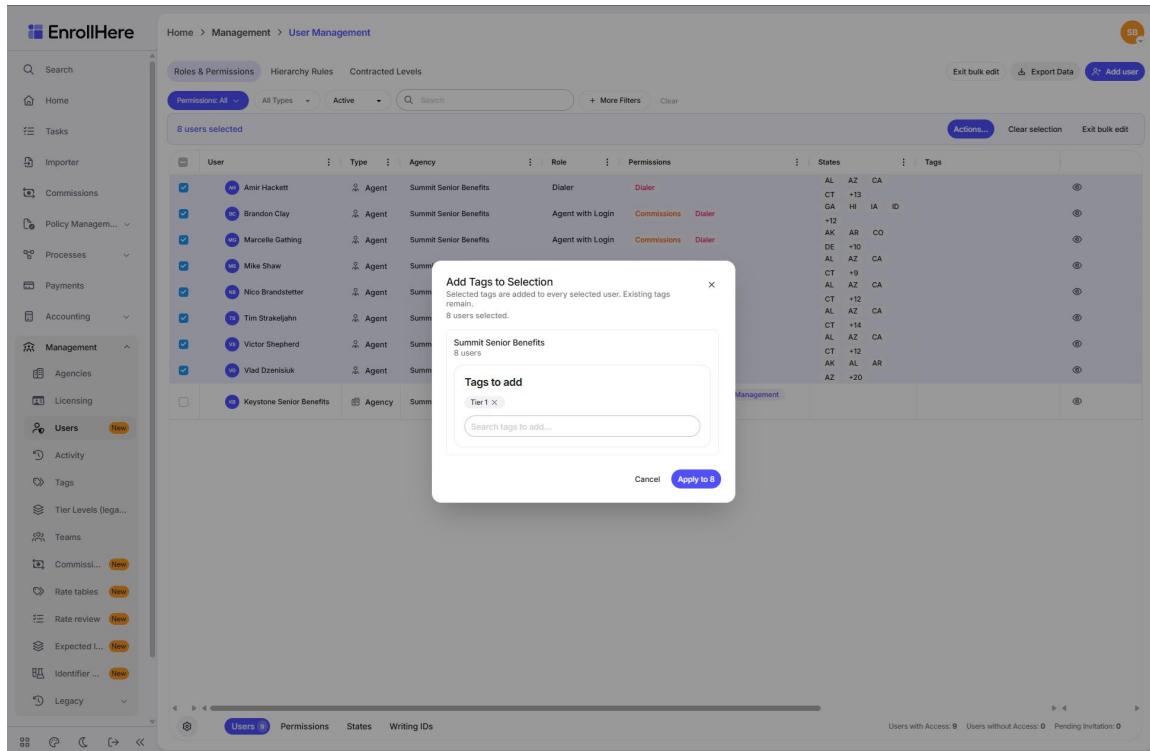


The Create Tag form: a name, plus optional categories.

Tag agents in bulk

1. Inside the Main Application, go to **Management → Users** and click **Bulk edit**.
2. Tick the agents you want.
3. Open **Actions...** and add tags. In **Add Tags to Selection**, pick Tier 1 and click **Apply to 8**.

Adding a tag never removes one. As the dialog says, "Existing tags remain."



Eight agents selected, with Tier 1 added to all of them in one step.

Point a queue at the tag

One queue at a time: open the queue, go to the **Can Receive From Queue** tab, and under **1. Include agents by tag** add Tier 1. Click **Save Changes**.

- **Match Any** includes agents with any of the listed tags. **Match All** requires every tag.
- **Add tag rule** adds a second rule.
- **2. Individually selected agents** adds people by name. They combine with the tag rules: an agent qualifies if they match a rule **or** are selected.
- **3. Excluded from queue** always wins, even over a matching tag.

EnrollHere Dialer > Call Routing > Queues > [TIER 1] MA Digital Inbounds 1

Edit Queue of Summit Senior Benefits

General Call Routing Can Send To Queue Numbers Can Receive From Queue Receiver Call Cap Schedule

Agents can receive calls from this queue if they match a tag rule or are individually selected — the two lists are combined. Excluded agents never receive calls from this queue, even when they match a tag rule.

8 agents can receive: 8 by tag rule, 0 individually selected.

1. Include agents by tag
Automatically include any agent matching these tag rules, in addition to the agents individually selected below. Membership updates automatically as agents gain or lose tags.

MATCH: ×

All Any ×

Agents that have any of these tags:

+ Add tag rule

> 8 matching agents

2. Individually selected agents
These agents never receive calls from this queue. Exclusion wins over tag rules and individual selection; excluding an individually selected agent removes them from the list above.

Users Filter list by tag: All × Remove All

3. Excluded from queue
These agents never receive calls from this queue. Exclusion wins over tag rules and individual selection; excluding an individually selected agent removes them from the list above.

Users Filter list by tag: All × Remove All

[Save Changes](#)

[TIER 1] MA Digital Inbounds 1: eight agents can receive, all eight by tag rule.

Many queues at once: go to **Dialer → Call Routing → Queues**, tick the queues, and click **Bulk Edit**. Choose **Receiver Agents**, use **Add by agent tag** (or **Remove by agent tag**), and click **Review Changes**. The tag rule is added to or removed from every selected queue.

EnrollHere Dialer > Call Routing > Queues

Queues List

Search queues Queue Type: All VIEW MODE: List Filters + More Filters

Show Disabled Show Archived Bulk Edit Export Data

Queue Name	Type	Skills	Billable	Sold	Delay Time	Status	Actions
☒ [TIER 1] MA Digital Inbounds 1	Receiver Agent	States Medicare	Disabled	Disabled	None	Enabled	ⓘ ⚙ ⌵
☒ [TIER 1] MA Digital Inbounds 2	Receiver Agent	States Medicare	Disabled	Disabled	30 seconds	Enabled	ⓘ ⚙ ⌵
☒ [TIER 1] MA Digital Inbounds 4	Receiver Agent				45 seconds	Enabled	ⓘ ⚙ ⌵
☒ [TIER 1] MA Digital Inbounds 6	Receiver Agent				60 seconds	Enabled	ⓘ ⚙ ⌵
☐ [TIER 2] MA Digital Inbounds 3	Receiver Agent				None	Enabled	ⓘ ⚙ ⌵
☐ [TIER 2] MA Digital Inbounds 8	Receiver Agent				35 seconds	Enabled	ⓘ ⚙ ⌵
☐ [TIER 2] MA Digital Inbounds 8	Receiver Agent				45 seconds	Enabled	ⓘ ⚙ ⌵
☐ [TIER 2] MA Digital Inbounds 9	Receiver Agent				60 seconds	Enabled	ⓘ ⚙ ⌵

Bulk Edit Queues
Select a setting category to edit for 4 selected queues:

☐ Duplicate Billable Settings
 ☐ Missed Billable Settings

☐ Billable Settings
 ☐ Delay Settings

☐ Blocked Lead Lists
 ☐ Enrollment Code Status Settings

☐ Script Settings
 ☐ Compliance Scrub Settings

☒ Enable / Disable Queues
 ☐ Receiver Agents

Selected Queues:

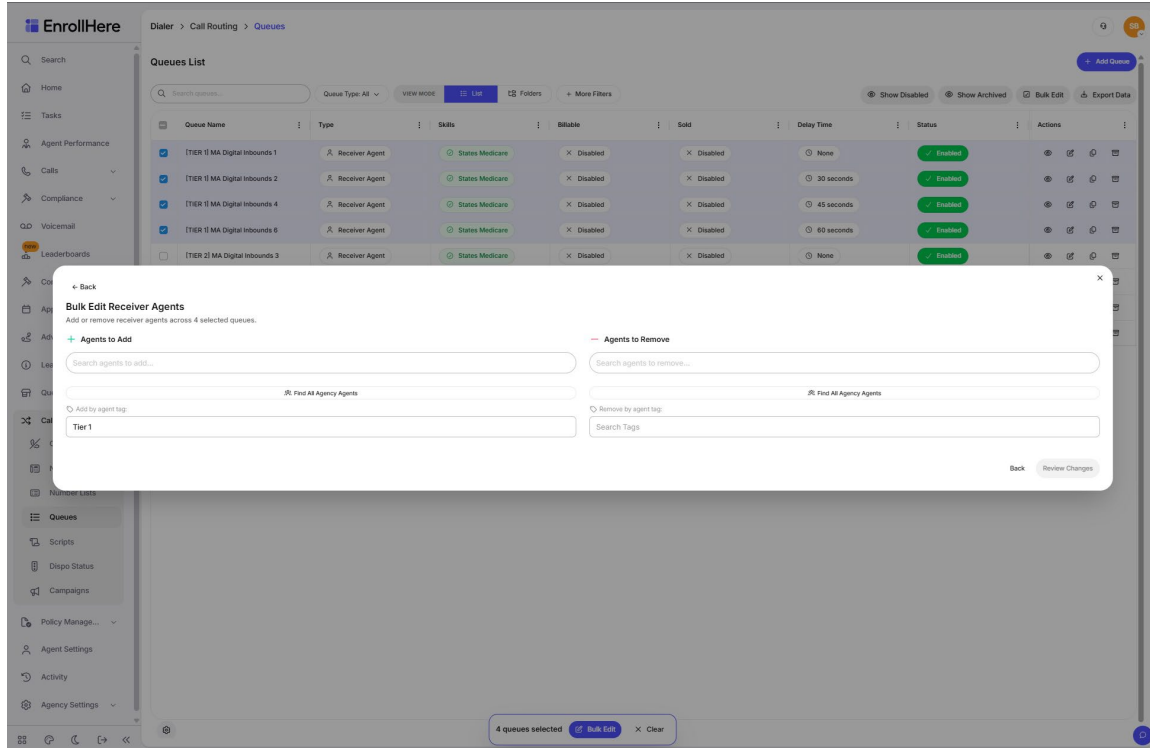
☒ [TIER 1] MA Digital Inbounds 1
 ☒ [TIER 1] MA Digital Inbounds 2

☒ [TIER 1] MA Digital Inbounds 4
 ☒ [TIER 1] MA Digital Inbounds 6

[Cancel](#)

4 queues selected [Bulk Edit](#) × [Clear](#)

Four Tier 1 queues selected. Receiver Agents is one of the bulk-edit categories.



Adding by agent tag across all four queues.

Tag ideas

Performance tiers are **one** way to use tags, not the only way. Tag along any line your floor already runs on:

Tag scheme	Example tags	Use it when
Performance tier	Tier 1, Tier 2, Tier 3	Groups of agents convert the same traffic differently
Language	Spanish, English	Callers need a language match
Shift	Morning, Evening	Coverage changes across the day
Carrier contract	Carrier A appointed	Only some agents can write a given plan
Product line	Medicare Advantage, Final Expense	Agents sell different products

An agent can carry several tags, for example Tier 1 and Spanish together.

2. Priority: match each tier to the traffic it converts best

Delay is the dial that sets which agents get which calls. A queue's **Delay Time** is how long an agent must have been available before that queue counts them. A queue with **None** counts an agent the moment they become available. A queue with a 60-second delay only counts agents who have been available for more than 60 seconds, so it gets whatever availability the faster queues leave.

A delay doesn't put callers on hold. When a vendor pings a queue, the queue reports only the agents who qualify at that moment. With one agent online who has been available for 12 seconds:

Queue delay	Available agents the vendor sees
None	1
35 seconds	0

A longer delay means the vendor sees fewer available agents, so you take fewer of its calls.

Tiers are about fit, not rank

Tier 1 and Tier 2 can work the same vendors; they just convert them differently. Tier 2 agents underperform Tier 1 overall, but on some traffic they do comparatively well. So the goal isn't "best traffic to best agents." It's to give each tier priority on the queues where it converts best, relative to its other options.

Layer 1: vendors within a tier

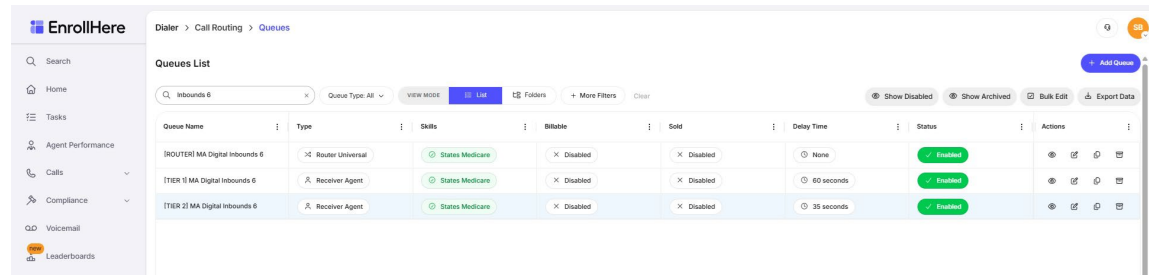
Each tier queue has its own delay, which ranks the vendors for that tier. In the Bulk Edit screenshot above:

Vendor	Tier 1 delay	Tier 2 delay
MA Digital Inbounds 1	None	—
MA Digital Inbounds 2	30 seconds	—
MA Digital Inbounds 3	—	None
MA Digital Inbounds 4	45 seconds	—
MA Digital Inbounds 6	60 seconds	35 seconds
MA Digital Inbounds 8	—	45 seconds
MA Digital Inbounds 9	—	60 seconds

Inbounds 6 is Tier 2's second-highest priority. For Tier 1 it's the lowest, because Tier 1 converts better elsewhere.

Layer 2: tiers within a vendor (the Router)

The publisher sends every call to one endpoint, a **Router** queue. The Router splits that traffic into one receiver queue per tier, each with its own delay. However you slice the traffic on your side, nothing changes for the publisher.



Searching "Inbounds 6" shows that vendor's full priority setup on one screen.

Queue	Type	Delay	Who counts as available
[ROUTER] MA Digital Inbounds 6	Router Universal	None	Receives every call from the publisher
[TIER 2] MA Digital Inbounds 6	Receiver Agent	35 seconds	Tier 2 agents available 35+ seconds
[TIER 1] MA Digital Inbounds 6	Receiver Agent	60 seconds	Tier 1 agents available 60+ seconds

This gives you one dial per tier, per vendor. If Tier 2 converts well on Inbounds 6 but isn't getting enough of it, lower its delay. Tier 1 and the publisher are unaffected.

Finding the balance

Delays cost you in both directions. With long delays, a vendor sees fewer available agents, and a publisher who often sees none may send their calls elsewhere. With too many queues at 0 seconds, or delays that overlap without reasonable gaps, calls can drop, and that hurts your place in the publisher's waterfall even more. There is no universal setting; the balance is the admin's call.

Measure fit before you set delays

Calls → Analysis breaks marketing performance down by queue, including conversion, cost per sale, and close rate. Each tier has its own queue for each vendor, so that view shows how every tier converts every vendor. Set delays from those numbers, and check them again after each change.

Set up priority for a vendor

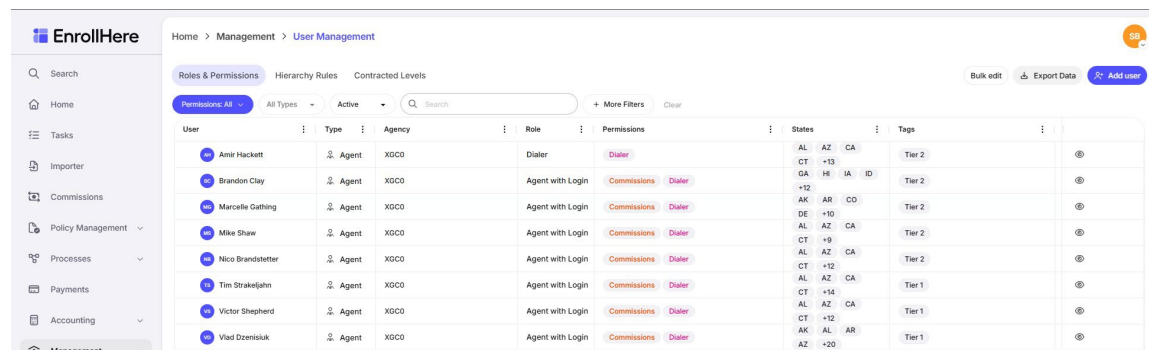
1. **Name queues with a prefix:** [ROUTER], [TIER 1], [TIER 2], followed by the vendor. A search on the vendor name then shows the vendor's full priority setup.
2. Create the vendor's Router queue, type **Router Universal**, and point the publisher at it.
3. Create one **Receiver Agent** queue per tier, and include agents by that tier's tag (section 1).
4. Open the Router, go to its **Can Receive From Queue** tab, and add the tier queues. They are now connected to the Router.
5. Set each tier queue's delay, either one queue at a time or several at once via **Bulk Edit** → **Delay Settings**.

3. Move agents by changing their tag

To move an agent between tiers, change their tag. Every queue that includes agents by tag updates itself, and you edit no queues.

1. Inside the Main Application, go to **Management** → **Users** and select the agent.
2. Open **Tags** and click **Edit**.
3. Remove Tier 1, add Tier 2, and save.

Make this change one agent at a time. Bulk edit in User Management adds tags but doesn't remove them, and an agent who gains Tier 2 without losing Tier 1 stays in every Tier 1 queue too.



The screenshot shows the 'User Management' page in the EnrollHere application. The page has a sidebar with navigation options like Search, Home, Tasks, Importer, Commissions, Policy Management, Processes, Payments, Accounting, and Management. The main content area displays a table of users with columns for User, Type, Agency, Role, Permissions, States, and Tags. The 'Tags' column shows 'Tier 1' and 'Tier 2' for different agents.

User	Type	Agency	Role	Permissions	States	Tags
Amir Hackett	Agent	XGC0	Dialer	Dialer	AL, AZ, CA, CT, +13	Tier 2
Brandon Clay	Agent	XGC0	Agent with Login	Commissions, Dialer	GA, HI, IA, ID, +12	Tier 2
Marcelle Gathing	Agent	XGC0	Agent with Login	Commissions, Dialer	DE, +10	Tier 2
Mike Shaw	Agent	XGC0	Agent with Login	Commissions, Dialer	AL, AZ, CA, CT, +9	Tier 2
Nico Brandstetter	Agent	XGC0	Agent with Login	Commissions, Dialer	AL, AZ, CA, CT, +12	Tier 2
Tim Strakejahn	Agent	XGC0	Agent with Login	Commissions, Dialer	AL, AZ, CA, CT, +14	Tier 1
Victor Shepherd	Agent	XGC0	Agent with Login	Commissions, Dialer	AL, AZ, CA, CT, +12	Tier 1
Vlad Dzenisuk	Agent	XGC0	Agent with Login	Commissions, Dialer	AK, AL, AR, AZ, +20	Tier 1

Five agents moved to Tier 2; three stay on Tier 1.

The queues follow on their own:

[TIER 1] MA Digital Inbounds 1 drops from eight matching agents to three, with no queue edits.

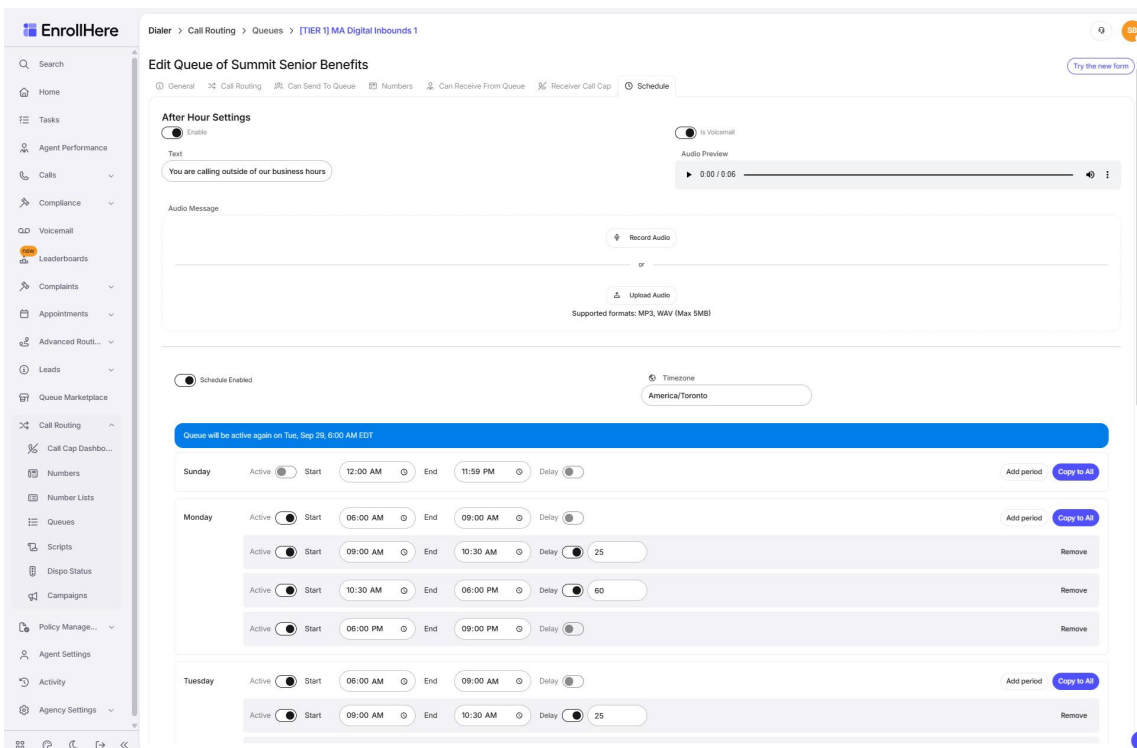
[TIER 2] MA Digital Inbounds 3 now has six agents: five by tag rule plus one selected by name. The named agent is tagged Tier 1 but was added by hand, which shows how individual selection combines with tag rules.

	Before tags	With tags
Moving 1 agent across 20 queues	~40 edits	1 edit
Moving 5 agents after a review	~200 edits	5 edits (one per agent)

	Before tags	With tags
Risk of a forgotten queue	High: one missed queue leaves an agent taking calls they shouldn't	None: queues read the tag

4. Schedules: change priority on the clock

Schedules shift a queue's delay through the day, so you set priority once instead of editing it every hour. Each day is split into **periods**. Each period has its own start, end, and delay, in a time zone you choose.



The Schedule tab on [TIER 1] MA Digital Inbounds 1, in the America/Toronto time zone.

Monday in the screenshot:

Period	Delay	Who this queue counts as available
6:00–9:00 AM	Off	Every available Tier 1 agent
9:00–10:30 AM	25 seconds	Tier 1 agents available 25+ seconds; faster queues get first claim on the rest
10:30 AM–6:00 PM	60 seconds	Only Tier 1 agents available 60+ seconds, for example

Period	Delay	Who this queue counts as available
		once a stronger publisher is live
6:00–9:00 PM	Off	Every available Tier 1 agent again

Sunday is inactive. Outside its periods the queue is closed. **After Hour Settings** plays a message or sends callers to voicemail, and the blue banner shows when the queue opens next.

Example: a publisher's lunch break

Say a 60-second delay on this queue exists so your top publisher can claim agents first. When that publisher breaks for lunch, their calls stop, but the delay stays. Your agents now sit idle for a full minute before this queue can reach them. Split the day so the delay drops for that hour:

Period	Delay
10:30 AM–12:00 PM	60 seconds
12:00–1:00 PM (publisher at lunch)	Off
1:00–6:00 PM	60 seconds

Set up a Schedule

1. Open the queue and go to the **Schedule** tab.
2. Turn on **Schedule Enabled** and pick the **Timezone**.
3. For each day, turn on **Active**, then set **Start** and **End**. To add a delay, turn on **Delay** and enter the seconds.
4. Click **Add period** to split the day into more periods.
5. Click **Copy to All** to reuse a day's periods across the week.
6. Optionally, set **After Hour Settings**: a text message or recorded audio for callers outside the schedule.

5. Dynamic Call Caps: protect your cost per sale

A cap stops an agent's inbound calls at a set number of billable calls. The performance override then lets agents who are converting keep going. It catches the agent who takes billable call after billable call and closes nothing, before you find out at the end of the day.

Caps live in **Dialer → Agency Settings → General**, in two blocks:

- **Call Cap per Agent (All Queues)** is the agency-wide default. Each agent is counted on their own usage across all queues. More specific caps (per agent, per queue, per receiver) override it.

- **Call Cap by Agent Tag** caps everyone with a given tag. Each agent is still counted on their own usage, never as a shared pool. If an agent has several capped tags, the strictest limit wins. Any window left empty inherits the agency default.

When an agent falls under more than one cap, the most specific one applies: a tag cap beats an agent cap, and an agent cap beats the agency default.

EnrollHere Dialer > Agency Settings

Agency: Summit Senior Benefits

General settings

Call Cap per Agent (All Queues)
Cap inbound (incoming) calls for every agent in this agency — hourly, daily, weekly, or monthly limits with optional performance overrides. Each agent is counted on their own usage across all queues.

Enable ☒

Call Limits [View Cap](#)
Applies to every agent in this agency (per-agent counts across all queues). Add the windows you need — hourly, daily, weekly, or monthly. More specific caps — per-agent, per-queue, and per-receiver — override this one.

Daily limits 15 billable [View Cap](#)

Total calls today: Unlimited | Bilable calls today: 15 | Bilable spend today (\$): Unlimited

Daily performance override [View Cap](#)
After today's call/bilable-call limit is reached, unlock using today's cost per sale / close rate (total and bilable call limits for this window). **Bilable spend is always a hard stop** and is not unlocked by performance.

Max cost per sale (\$): 120 | Min close rate (%): Not set

☒ Both criteria required

Add: [Hourly](#) [Weekly](#) [Monthly](#)

Call Cap by Agent Tag
Caps agents by their permanent tag, each on their own usage — never a shared pool. Counts calls across all queues. With multiple tags, the strictest limit wins.

Tag: Add tag cap...

Sales Agent Enabled ☒ [Override Agency](#)

Limits set here override the more general cap per period; periods left empty still inherit.

Daily limits 10 billable [View Cap](#)

Total calls today: Unlimited | Bilable calls today: 10 | Bilable spend today (\$): Unlimited

Daily performance override [View Cap](#)
After today's call/bilable-call limit is reached, unlock using today's cost per sale / close rate (total and bilable call limits for this window). **Bilable spend is always a hard stop** and is not unlocked by performance.

Max cost per sale (\$): 110 | Min close rate (%): Not set

☒ Both criteria required

Agency default: 15 billable calls a day, unlocked below \$120 cost per sale. The Sales Agent tag overrides it with 10 billable calls and \$110.

The settings in each window

Add hourly, daily, weekly, or monthly windows. Each window has:

Setting	Example	What it does
Bilable calls	15	The cap, and also the minimum sample before performance is judged. Three calls without a sale is noise; fifteen is a signal.
Total calls	Unlimited	Caps all inbound calls, billable or not
Bilable spend (\$)	Unlimited	A spend ceiling. It is always a hard stop that performance

Setting	Example	What it does
		cannot unlock.
Performance override: Max cost per sale (\$)	\$120	Once the call cap is hit, agents at or under this cost per sale keep taking inbound
Performance override: Min close rate (%)	Not set	An alternative unlock based on close rate
Both criteria required	Off	When on, an agent must meet both the cost-per-sale and the close-rate targets

These numbers are examples, not recommendations. Set yours to your own economics.

What happens at the cap

- **Converting under target:** the override unlocks, and the agent keeps taking inbound while they stay under. They might stop at call 16 or keep going to call 35.
- **Over target:** the agent is **capped**, meaning paused from inbound. They can still dial outbound or go into training.
- **Admin override:** an admin can raise or reset the cap during the window.
- **Automatic reset:** the cap resets on its own when the window ends. A daily cap resets at midnight Eastern.

Worked example

This assumes \$25 per billable call, a daily window, a 15-call cap, and a \$120 max cost per sale.

Agent	Billable calls	Sales	Spend	Cost per sale	Result
A	15	5	\$375	\$75	Unlocked, keeps taking inbound
B	15	3	\$375	\$125	Capped at call 15
C	15	0	\$375	— (no sales)	Capped at call 15
D	15	4	\$375	\$93.75	Unlocked, keeps taking inbound
D, later	20	4	\$500	\$125	Capped at call 20

Set up a cap

1. Go to **Dialer → Agency Settings → General**.
2. For the agency default, turn on **Call Cap per Agent (All Queues)**. Set the limits, then turn on the performance override and enter **Max cost per sale**.
3. For a tag, open **Tag: Add tag cap...** under **Call Cap by Agent Tag** and pick the tag, for example Tier 2. Enable it and set only the windows you want to override.
4. Use **+ Hourly**, **+ Weekly**, or **+ Monthly** to add more windows.

Per-queue caps live on each queue's **Receiver Call Cap** tab, and the Call Cap Dashboard is under **Dialer → Call Routing**.

Quick reference

Tool	Answers	Where	Key setting
Tags	Who is eligible	Main Application → Management → Tags; applied in Management → Users	Tag name
Queue tag rules	Which agents a queue includes	Queue → Can Receive From Queue	Include by tag (Any / All), individual picks, exclusions
Priority	Who sees a call first	Router queue + one queue per tier	Delay Time per queue
Schedules	How priority changes through the day	Queue → Schedule	Periods with start, end, and delay
Dynamic Call Caps	How much an agent can spend	Dialer → Agency Settings → General	Billable call cap + max cost per sale + window