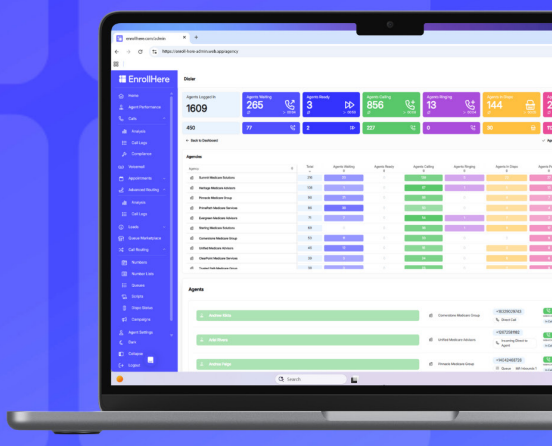
EnrollHere

Sprint Updates

New platform enhancements that simplify operations, improve productivity and strengthen reliability.

Aug. 31-Sept. 4, 2026 | 30 New & Improved Features



FEATURED ENHANCEMENTS

8 Categories

At a Glance

This week's updates include:

- Flexible appointment scheduling
- Expanded calling and routing controls
- Enhanced reporting and live visibility
- Improved commission workflows
- More reliable intelligence and analytics

Appointments and Scheduling

- **Flexible Appointment Lengths**
  Agencies can configure appointment lengths instead of relying on a fixed one-hour block. Availability, conflicts and calendar events remain aligned to help reduce scheduling errors.
- **Clearer Time Zone Display**
  Appointment lists, dashboards and calendars display times in the viewing agent's time zone while retaining the lead's local-time context. This helps agents avoid missed or misread appointments.

Routing and Queue Management

- **Agent Group Prioritization**
  Queue administrators can prioritize or delay groups of agents using tags. This reduces the need to maintain individual routing rules as staffing changes.
- **Improved Capacity Management**
  Routing enhancements help queues consistently enforce concurrent-call limits, keep callers queued when capacity is reached and direct available agents to other queues that can accept calls.

Calling and Campaign Workflows

- **Saved Phone Numbers**
  Agents can save, search and reuse frequently called numbers across devices. Personal number lists remain private to each agent, reducing repetitive entry and dialing mistakes.
- **Expanded Automated Campaign Capacity**
  Lead-list campaigns can use AI agents for outbound dialing, expanding automated campaign capacity. Campaign configuration also provides separate views for AI-agent and human-agent dialing modes, making campaign intent and staffing easier to understand.
- **State-Specific Calling Windows**
  Agencies can define multiple calling windows by state. This supports planned breaks while maintaining calling-hour safeguards.
- **Shared Upline Campaigns**
  Downline agencies can work from a shared upline lead pool with read-only visibility, coordinated dispositions and protections against duplicate charges.
- **Improved Hold Experience**
  One-to-one calls now support music-backed hold while preserving the call, recording and transfer experience.
- **Expanded Messaging Enrollment**
  Agencies can enroll larger groups of personal phone numbers in messaging campaigns and automatically add newly claimed numbers, reducing manual setup and recovery work.
- **Clearer Number Purchasing**
  When immediate number inventory is unavailable, Buy and Bulk Buy provide clearer information about fulfillment, billing and carrier-related errors.

See Page 2 for additional featured enhancements. ↓

Reporting and Live Visibility

- **Custom Fields in Call Logs**
  Call Logs can display and export agency-defined lead fields, giving operations teams more context without requiring separate lookups.
- **Expanded Agent Performance Reporting**
  Agent Performance now includes average auto-dial wait time, sorting, exports and configurable columns. These enhancements help leaders compare staffing efficiency with outbound performance.
- **Improved Outbound Reporting**
  Outbound reports provide more stable charts, clearer map legends and KPIs, and exports that reflect the visible sorted view.
- **Expanded Live IVR Dashboard**
  The live IVR dashboard now includes maximum wait time, agents currently on calls and combined monitoring across multiple queues. These enhancements provide greater visibility into staffing needs and caller demand.
- **Lead Status Updates**
  Users can update lead statuses individually or in bulk without creating artificial call activity. This helps preserve accurate call histories while supporting off-dialer work and consent management.

Policy and Administration

- **Improved Custom Field Management**
  Administrators can safely regenerate policy custom-field identifiers, copy identifiers and access creation controls closer to where they work.
- **Improved Variable Selection**
  Variable menus now support search and agency-defined lead fields while remaining visible above surrounding settings. This makes custom URLs and scripts easier to configure.
- **Improved Large-Script Processing**
  Long Word and PDF scripts now include staged progress and clearer error handling, improving the onboarding experience for larger scripts.

Platform Controls

- **Expanded Stripe Connect Configuration**
  Administrators can configure separate Stripe Connect routing for call costs and subscriptions while retaining fallback settings for existing agency configurations.
- **Improved Webhook Configuration**
  Lead-list selectors prevent duplicate choices and clear outdated empty-result messages, reducing configuration errors.
- **Expanded Complaint Assignments**
  Complaints can include agents, staff members and additional assignees. Each assignee receives appropriate visibility and reporting attribution, while existing single-assignee cases remain supported.

Commissions and Reporting

- **Consistent Payout Routing**
  Payout routing is managed through one agency-level setting, helping keep commission processing and reporting consistent.
- **More Precise Import Permissions**
  Import authorization follows the selected business area, helping ensure payout, commission, lead and agent data follow the appropriate permissions and cycle requirements.
- **Improved Payee Identification**
  New payout records distinguish between agent and agency payees while maintaining access to legacy records.
- **Expanded Cycle-Close Access**
  Users with commission-write access can validate and close eligible cycles without requiring full administrator access. Failed-item checks remain in place to protect processing quality.

Intelligence and Analytics

- **Improved Intelligence Chat Reliability**
  Enhancements improve Intelligence Chat stability across completed, failed, canceled and streaming conversations while supporting a controlled transition from legacy technology.
- **More Detailed Agent-Status Data**
  Agent-status transitions are captured at more precise intervals, improving visibility into wait times and agent modes to support better staffing decisions.

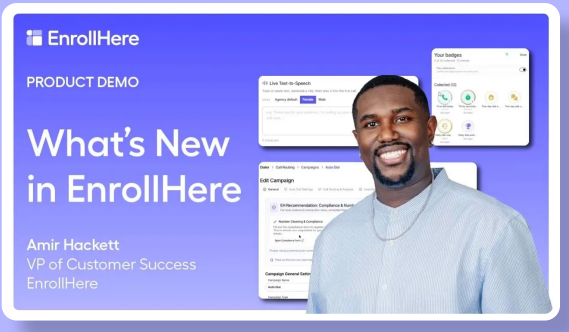
Feature availability may vary based on your agency's platform configuration and permissions.

See Page 3 for product demo videos. ↓

EnrollHere Product Demos

New Dialer Features Built for AEP Readiness

What if your dialer could take more work off your agents' plates and give managers visibility before problems become surprises? In this product update, Amir Hackett, VP of Customer Success at EnrollHere, walks through the latest features we've shipped to the EnrollHere dialer, all designed to make day-to-day operations more automated, visible, and manageable.



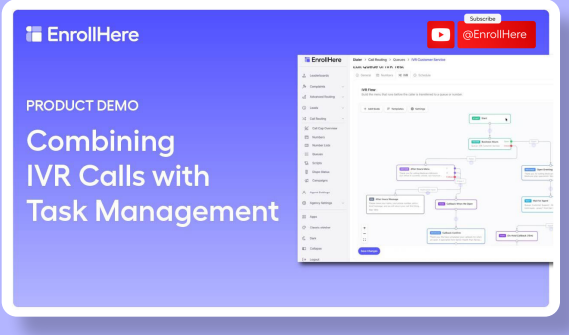
Understanding Lifetime Value for Your Book of Business

What is your book of business really worth and how much future revenue can it generate? In this EnrollHere product demo, Sawyer Nyquist, Head of Data at EnrollHere, walks through how EnrollHere's Lifetime Value (LTV) calculations help insurance agencies understand the current and future value of their policies.



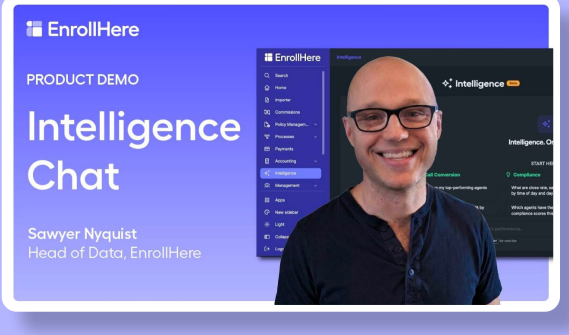
Turn Customer Calls Into Actionable Follow-Ups

Every customer interaction deserves a timely response, even when agents are unavailable. EnrollHere now connects interactive voice response calls directly to task management, automatically creating and assigning follow-up tasks based on each caller's needs.



Intelligence Chat: Your On-Demand Data Analyst

See how Intelligence Chat answers real-time questions and uncovers insights across call center performance, compliance and policies. Sawyer Nyquist demonstrates how teams can investigate complex business questions using their data.



Questions about these updates?

Contact your EnrollHere customer success manager or email support@enrollhere.com.