EnrollHere

Sprint Updates

New platform enhancements designed to improve call visibility, strengthen compliance oversight and help teams work more efficiently across campaigns, reporting and administration.

October 19-23, 2026 | 25 New & Improved Features

FEATURED ENHANCEMENTS

6 Categories

This week's Sprint Updates include 25 enhancements across call routing, SMS, compliance scorecards, performance reporting, agency administration, campaign management, commissions and Intelligence.

Performance Reporting & Compliance

- **Hourly Sales Performance**
  An hourly sales chart provides running totals, agent and product filters and optional billable-call comparisons aligned with the agency's reporting time zone.
- **Critical Compliance Failure Visibility**
  Compliance teams can identify and filter critical failures even when an agent's overall score is high.
- **Readable Scorecard Metrics**
  Scorecard categories display recognizable metric names instead of internal identifiers.
- **Safer Disposition Management**
  Administrators receive a warning when an active scorecard references a custom disposition they are attempting to delete.
- **Carrier and Product Scorecard Matching**
  Scorecards use policy information stored on the call to support more reliable carrier- and product-specific matching.
- **Policy-Triggered Scorecard Evaluation**
  Linking or updating a policy can trigger scorecard evaluation when policy details become available after the call.
- **Reliable Large Scorecards**
  Large scorecards process in smaller batches, reducing timeouts and providing clearer information when a scoring run is unsuccessful.
- **Complete Medicare Scoring Results**
  Incomplete Medicare scoring results trigger another attempt instead of being recorded as successfully completed.

Call Routing

- **Accurate Ring Group Connections**
  Ring group agents connect to the specific caller whose offer they accepted, reducing incorrect connections to other waiting callers.
- **Manual Call Acceptance**
  Calls configured for manual acceptance continue waiting for the agent to answer or reject instead of answering automatically.
- **Unanswered Call Warnings**
  Agent-number settings alert administrators when no unanswered-call action has been saved, making routing gaps easier to identify.
- **Accurate Automated Menu Tracking**
  Live automated phone menu views clear completed caller journeys, giving supervisors a more accurate picture of current activity.
- **Expanded Supervisor Day View**
  The supervisor Day view shows clearer call statuses, inbound and outbound indicators and queue or campaign context. Authorized users can also review agent wallet balances and related balance details from the same view.
- **Detailed Connection Quality**
  Call details distinguish between agent-side and customer-side connection quality, helping teams investigate audio issues more accurately. Call-list quality now reflects the agent's connection rather than the last participant to disconnect.
- **Reliable Manual Text Delivery**
  Manually sent texts queue and retry during busy carrier periods while preserving the recipient and preventing duplicate sends.
- **Reliable Automated Text Delivery**
  Automated texts retry temporary service failures, and missing personalization values use fallbacks instead of preventing delivery. Previously failed messages are not automatically resent.

See Page 2 for additional featured enhancements. ↓

Agency Administration

- **Expanded User Exports**
  User exports include NPN and agent tags, making licensing, roster and routing reviews easier. These details can be exported alone as CSV or with other sections in Excel. Export access now extends to users with User Management permissions.
- **Reliable Custom Field Settings**
  Authorized staff can save agency custom field settings without unrelated Caller ID or onboarding permissions blocking the update.
- **Consistent Dialer Administration**
  Authenticated Dialer administrators can access their profiles and agency memberships without changing their assigned permissions.

Campaign Management & Queue Marketplace

- **Faster Campaign Management**
  Campaign lead lists load immediately, and tag filters and bulk selection make agents easier to find. Saved agent rules and exclusions are enforced as tags change, helping campaigns remain aligned with intended eligibility.
- **Smoother Marketplace Browsing**
  Improved scrolling and search help users explore larger queue selections, while queues and featured cards appear without waiting for fit scoring to finish.

Commissions

- **More Informative Payout Reports**
  Optional NPN, email and agency columns add identifying context to payout reports, making it easier to distinguish agents and reconcile payments.

Intelligence

- **More Reliable Complex Analysis**
  More selective data retrieval helps Intelligence complete complex queue and agent analysis while maintaining existing permissions.
- **Accurate Team and Tag Results**
  Improved team and tag lookups help Intelligence identify matching agents without changing user access restrictions.
- **Consistent Appointment Insights**
  Appointment questions and reports use consistent agency filters and access requirements while preserving ownership, team and cost controls.

Questions about the latest updates?

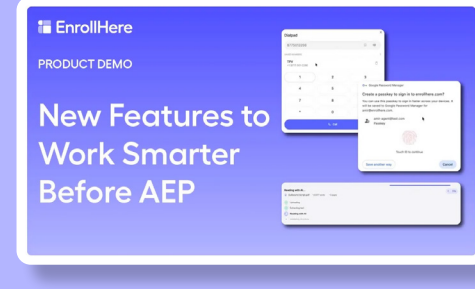
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Implement Seven New Features

AEP puts more pressure on every part of an insurance agency's workflow. That's why EnrollHere shipped seven new features designed to eliminate repetitive tasks, prevent avoidable errors and help agents and teams work more efficiently. → Watch Demo



Platform Optimization for AEP Success

AEP is underway, but there's still time to optimize your EnrollHere platform for success. Our 5 Dials to Turn Before AEP guide walks you through essential settings, workflows and tools to improve efficiency, strengthen compliance and maximize performance. These improvements can be implemented at any time throughout AEP to keep your operations running at their best. → Explore the 5 Dials

