EnrollHere

Sprint Updates

October 26-30, 2026 | 39 New & Improved Features

FEATURED ENHANCEMENTS

6 Categories

New platform enhancements designed to improve agency administration, strengthen compliance oversight and support more reliable sales, policy and commission workflows.

Agency Administration and Configuration

- **More Flexible Agency Invitations**
  Invitations support individual tags and state selections. Disabled memberships are reactivated instead of creating duplicate accounts.
- **Single Sign-On Controls**
  Administrators have explicit control over single sign-on settings while preserving agency access boundaries.

Policy Management

- **Improved Policy-to-Lead Association**
  Incoming SunFire enrollment policies connect to the lead associated with the originating call before using phone-number matching, reducing incorrect lead associations.
- **Accurate Policy Signature Types**
  Policy signature types display and update correctly, providing agents with more reliable policy details.
- **Synchronized Lead and Customer Information**
  Authorized lead and customer information remains synchronized when customer features are disabled. Failed lookups do not create speculative customer records.
- **Missing Phone Number Updates**
  Agents can add a missing phone number to an existing submitted policy and complete the submission without switching customers or duplicating the sale.

Dialer

- **AI-Powered Inbound Screening**
  Inbound call flows support AI-powered screening and data collection, with configurable outcomes that route callers to the appropriate next step.
- **Clearer SMS Campaign Setup**
  Corrected keyword formatting reduces avoidable SMS campaign rejections, while clearer provider messages explain setup errors.
- **Targeted Blocked Lead Lists**
  Managers can apply blocked lead lists to selected agent groups without unnecessarily blocking eligible teammates. Individual and bulk queue updates are supported, while ring groups are excluded.
- **Queue Billing Settings**
  Queue billing settings are easier to manage, and cleared per-call charges remain cleared after later edits.
- **Accurate Post-Call Timer Guidance**
  Post-call timer settings display only valid warnings while preserving existing call-finalization and billing behavior.
- **Permitted Custom Fields in Call Logs**
  Agents can access permitted lead custom fields within call logs while restricted fields remain private.
- **Shared Appointment Visibility**
  Agencies can allow agents to see who has already booked a lead and the order in which appointments were scheduled, supporting better coordination.
- **Protected Task Ownership**
  Editing another agent's call result preserves task ownership boundaries and avoids unnecessary task changes.
- **Clearer Custom Call Outcomes**
  A visibly highlighted icon makes custom call-outcome setup easier to identify.
- **More Readable Agent Views**
  Compact agent views display queue names on one line, with full names available when users hover over them.

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

See Page 2 for additional featured enhancements. ↓

Compliance, Scorecards, Leaderboards, and Performance Management

- **Flexible Compliance Reporting Periods**
  Compliance results can be compared using familiar date presets and custom ranges, with dashboard charts following the selected period.
- **Complete Scoring Error Reporting**
  Distinct scoring errors are reported across the entire selected period instead of only the most recent failed runs, providing a clearer view of recurring problems.
- **Downloadable Compliance Reports**
  Compliance reports can be downloaded in Excel using the selected agency, dates and source. Reports include period totals and agency breakdowns.
- **More Readable Compliance Tables**
  Compliance tables maintain space for at least seven rows on smaller screens, improving readability.
- **Independent Scorecard Processing**
  Valid scorecards continue processing when another scorecard has an invalid configuration, preventing one issue from stopping the entire batch.
- **Validated Scorecard Filters**
  Scorecard filters are validated and correctly recognize category-based call outcomes, reducing configuration errors and missed scoring triggers.
- **Clearer Compliance Monitoring**
  Compliance monitoring is organized around calls, costs and processing health, with clearer conversation counts and model-usage information.
- **Expanded Live Dashboards**
  Live dashboards include agency-scoped reporting, organizational hierarchy views and vendor insights.
- **Faster Cross-Agency Reporting**
  Queue lists and call analysis load more efficiently for users working across multiple agencies. Summary charts appear before more detailed information.
- **Call Outcomes in Agent Timelines**
  Color-coded outcomes for completed calls appear directly in agent activity timelines, helping managers understand results without opening each call.
- **Expanded Leaderboard Date Options**
  Interactive leaderboards include yesterday and custom-date-range options, allowing managers to evaluate performance over the period that matters to them.
- **Consistent Agent Performance Metrics**
  Agent Performance summary tiles and tables align with the selected definition of a sale, including consistent close-rate and cost-per-sale calculations.

Commissions Processing and Management

- **Clearer Connection History**
  Connection History shows whether a profile connection was initiated by a person or through automation, improving accountability.
- **More Reliable Profile Merges**
  Profile merges remain reliable when enrollment updates occur at the same time, reducing failed policy transfers.
- **Preserved Payout Hierarchies**
  The existing payout hierarchy remains unchanged when a profile merge updates only the writing agent.
- **Stable Hierarchy Controls**
  Hierarchy-management controls remain in a consistent position on narrower user cards, reducing accidental selections and layout shifts.
- **Commission-Cycle Payout Filters**
  Commission-cycle filter options are available for payouts using current payee information.
- **Accurate Deleted-Payout Results**
  Deleted payouts remain removed from search results when background updates are completed.
- **Original Statement Inputs**
  When a rate cannot be resolved, reviewers can see the original statement inputs to understand why the commission requires attention.
- **Targeted Rate Reviews**
  Rate-review lines can be filtered by commission amount, and follow-up actions apply only to selected records.

Intelligence

- **Defined Reporting Metrics**
  Reporting metrics include explicit units and definitions so Intelligence can interpret durations, percentages and monetary amounts consistently.
- **More Complete Follow-Up Responses**
  Validated partial answers are preserved for follow-up questions, structured reporting tables are provided and unavailable close rates are distinguished from genuine zero results.
- **Protected Leadership Snapshots**
  Recipient-specific access controls provide stronger protection for leadership scorecard snapshots.

Questions about these updates?

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

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