SPRINT 100

Release Notes

JULY 23, 2026

Deployment & Smoke Testing Scheduled for: JULY 23, 2026 | 4AM - 9AM PST

Overview

Please Note: The following issues were discovered –

Subcontractor Invoicing

The following subcontractor organizations were not set up in the UAT environment and could not be tested before deployment: LMS, AIM Consulting, and Sierra Electric. When Sprint 100 was deployed into Production, invoices for these organizations could not be generated.

Additionally, Mclane did not have non-ECM labor rates properly configured. Permit Inspection, Certified Payroll, and any billable items tied to a tech classification needs to be retested.

FIN Role | Utility Invoice Builder

Item #1: When creating a batch that included items from the old “Installations” tab and the new “Installations V2” tab – the job from the old “Installations” tab disappears once the batch is created

Item #2: Jobs from the new “Installations V2” tab appear in both the old “Invoice Documents" tab and the new "Invoice Documents V2” tab. Since they were generated using the new system, it should only appear in V2.

Item #3: Discovered during smoke testing in PROD – installations that were marked as Install Approved using the old process, but do not have a corresponding Supporting Document uploaded will appear in the “Installations V2” tab. Once these projects have their documents uploaded in the Supporting Documents Section – they will be properly displayed in the “Installations” tab

1.) Workspace Enhancements:

- Improved Workspace Filter Navigation
- KPI Cards Restored
- New VIP Flags
- New Tags Column
- Workspace | Work Orders: New “Install Complete - No Invoice” Filter

2.) ESR Dashboard: Odd + Even Address Number Filtering Restored

3.) Building Type DDL Removed from UI

4.) Enhanced Operational Flags

5.) CCSR: New Subcontractor Invoicing Process

- Installation Invoices
- Permit Inspection Invoices
- Additional Work Invoices
- Certified Payroll Invoices
- New “Invoices” Page Allows CCSRs to Track Invoice Statuses

6.) CSR: New Subcontractor Invoice Approval Process

7.) FIN: Utility Invoice Builder Now Supports the New Subcontractor Invoice and Approval Process

SPRINT 100

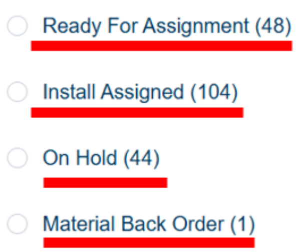
Release Notes

JULY 23, 2026

1.) Workspace Enhancements:

Improved Workspace Filter Navigation

Previously, users had to click precisely on the small radio button to switch between filtered sections of the workspace. Now users can click anywhere on the section label text to switch views, making navigation faster and easier



KPI Cards Restored

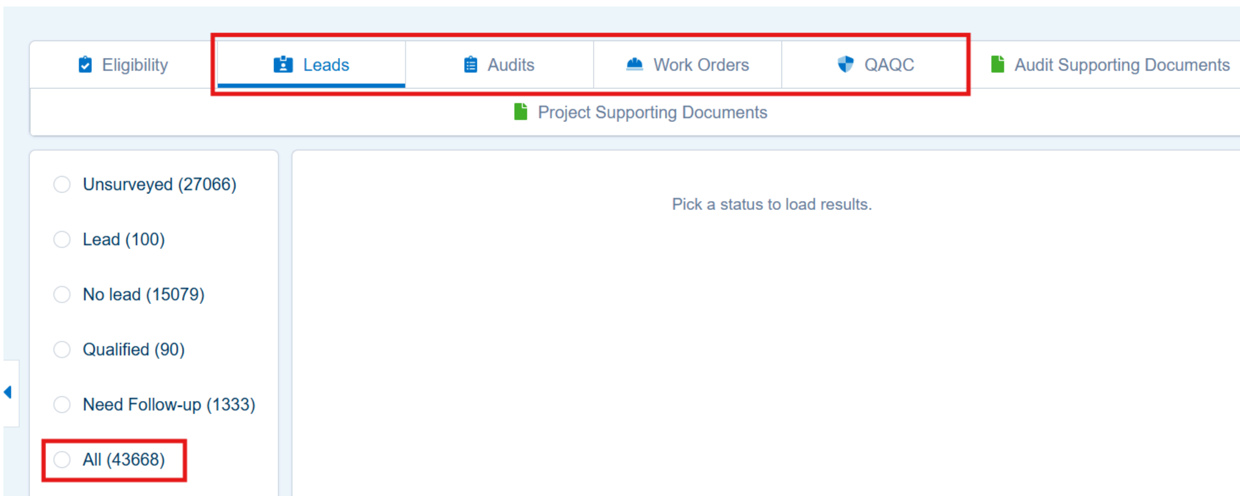
KPI summary cards were removed when new table displays were deployed in a previous sprint. Sprint 100 restores these KPI Summary cards at the top of each workspace section.

<u>New VIP Flags</u>

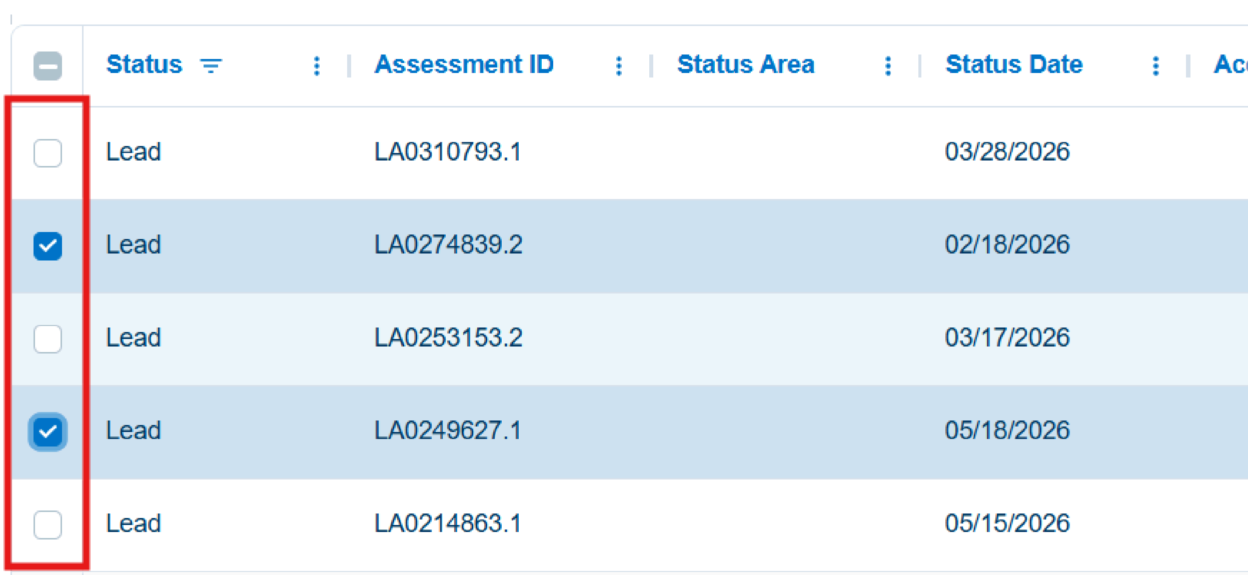
A new VIP tag lets CSR users flag high-priority customers so their jobs stand out anywhere in the workflow. This tag can be added across the Leads, Audits, Work Orders, and QA/QC sections of the workspace.

How to add a VIP flag:

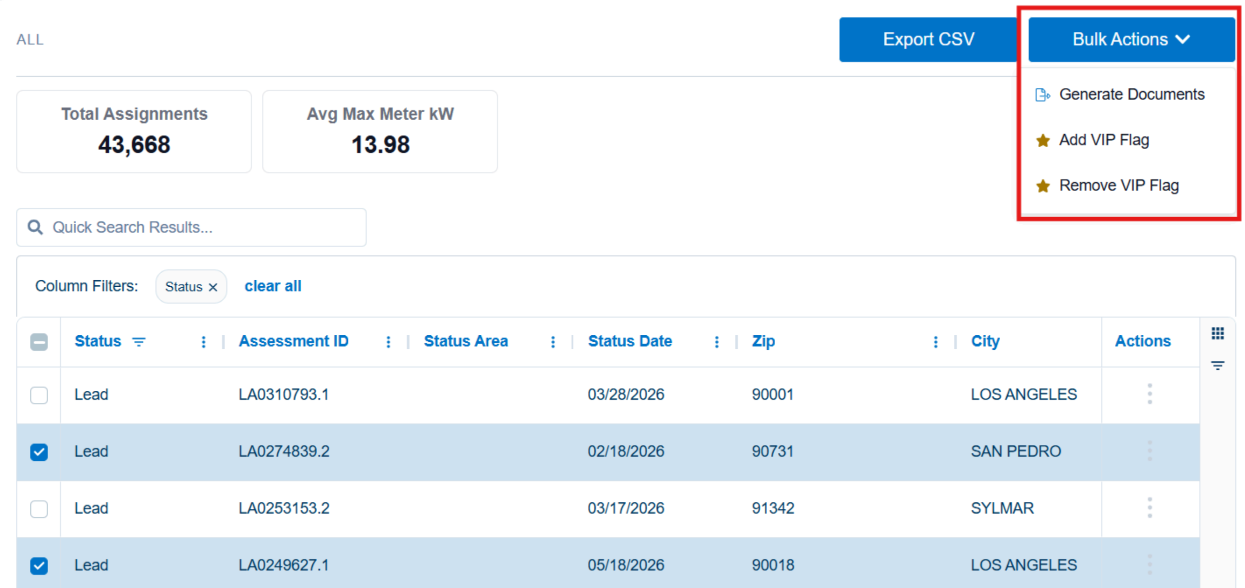
1.) Go to any workspace section (Leads, Audits, Work Orders, or QA/QC) and select the All bucket on the left-hand filter list.



2.) Check the boxes next to the project(s) you want to flag.



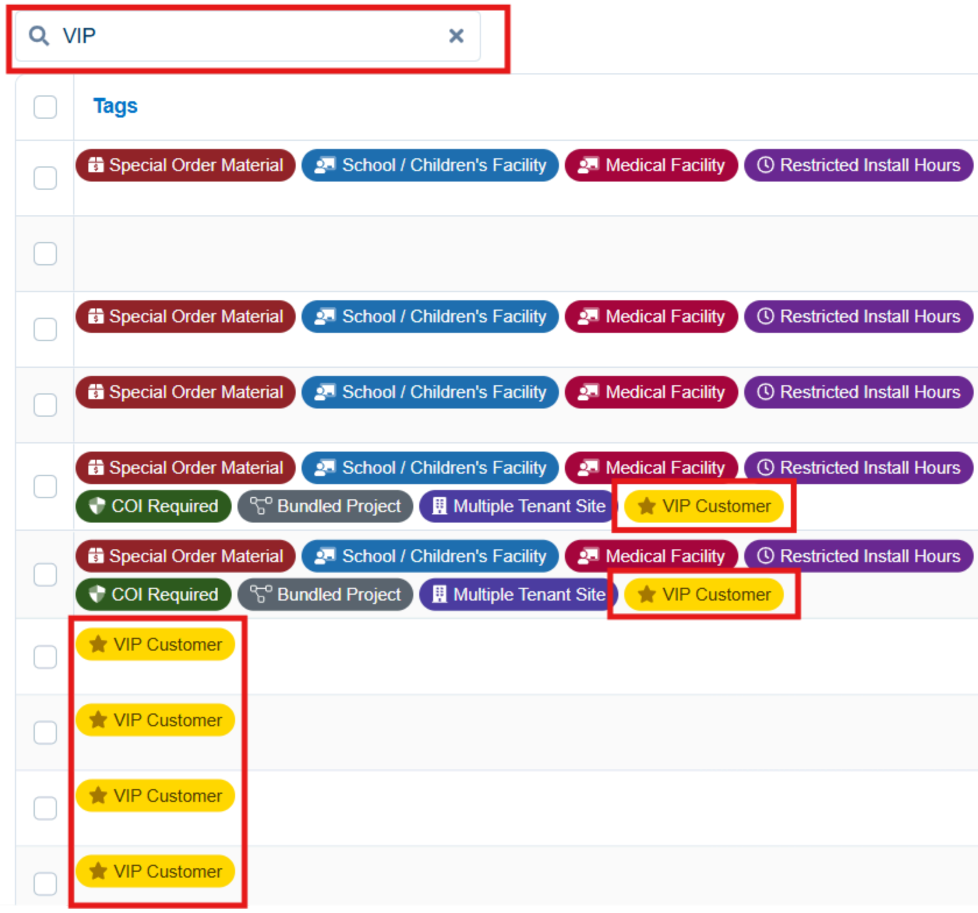
3.) Expand the “Bulk Actions” dropdown menu and click on “Add VIP Flag.”



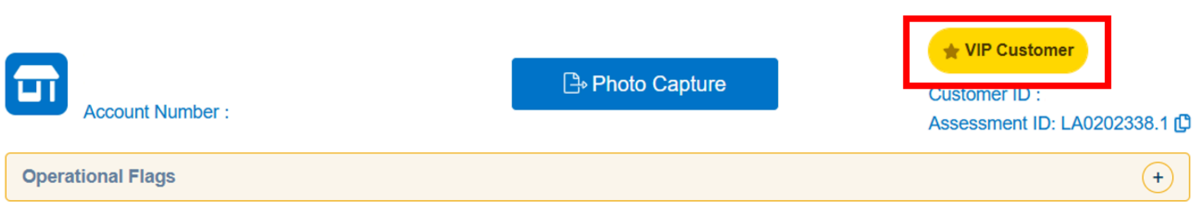
Additional Information About the VIP Flag:

• VIP flags can only be added from the All section by a CSR, but once added they are visible in the CSR, CCSR, and UTIL Workspaces and ESR, AUD, and INST Dashboards under the new “Tags” column (more information below).

• Use the “Quick Search” and type "VIP" to pull up every VIP-flagged customer displayed in a table



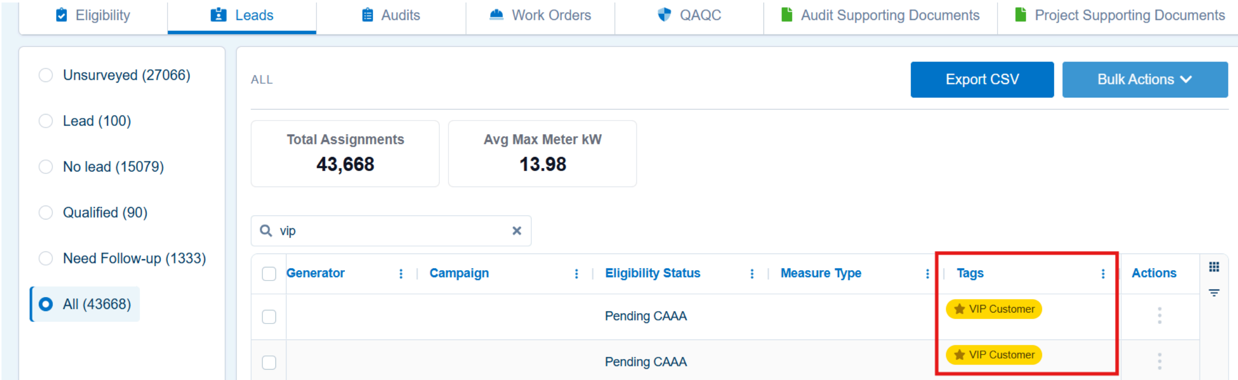
• When viewing a customer's account record, the VIP Customer badge appears at the top of the screen alongside the account information, and stays visible no matter what phase of the workflow the customer is in.



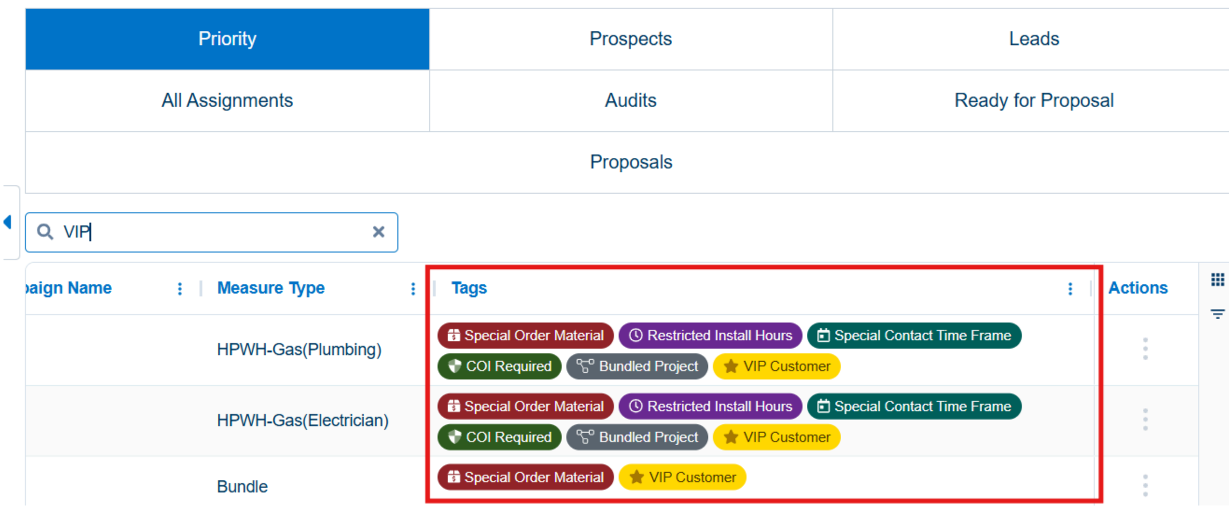
New "Tags" Column

The CSR, CCSR, and UTIL Workspaces and the ESR and AUD Dashboards now feature a new column called "Tags" that displays VIP and Operational Flags (see Section 4) that have been added to a customer record.

Workspace View:

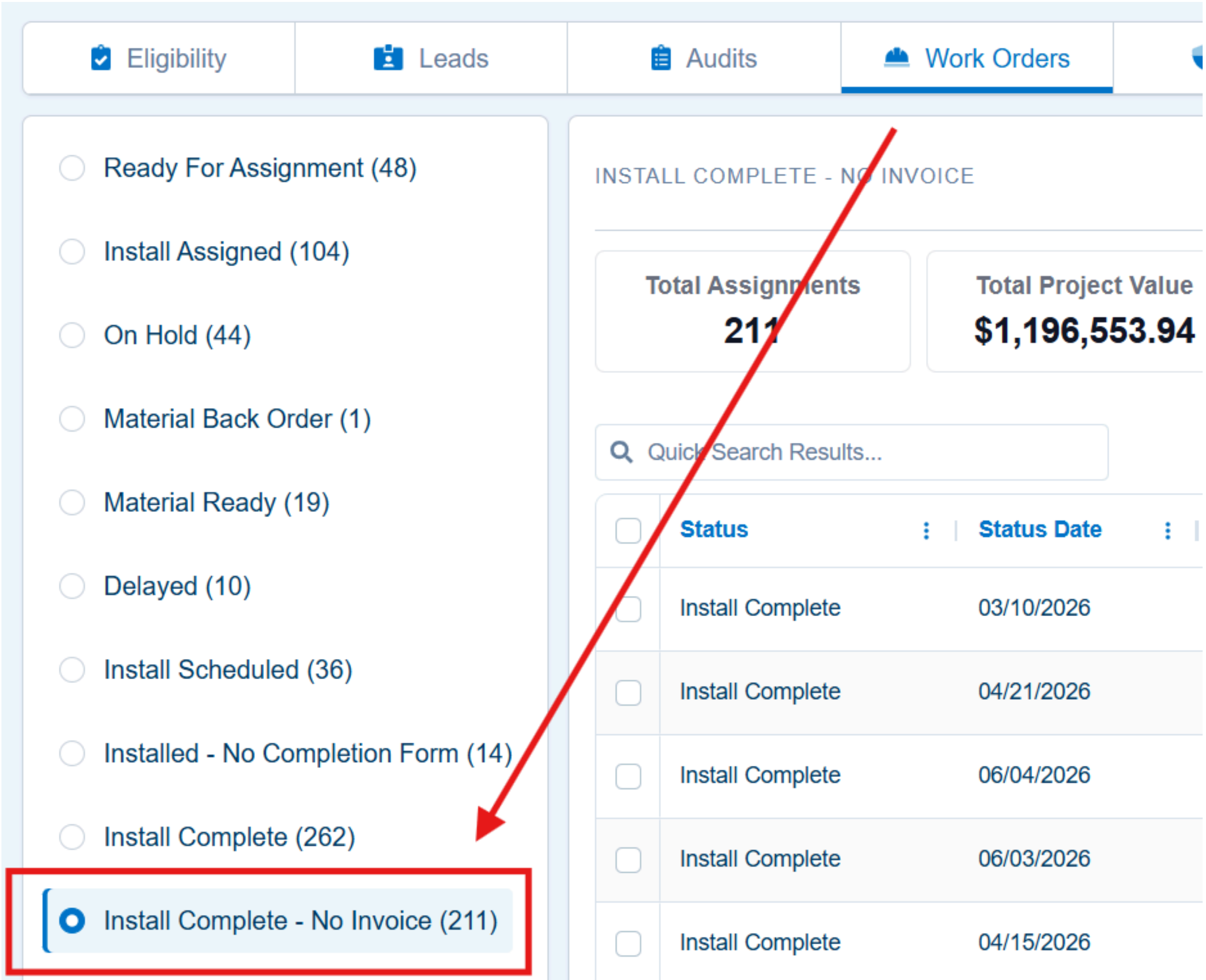


Dashboard View:



Workspace | Work Orders: New “Install Complete - No Invoice” Filter

With the new subcontractor invoicing process, CSRs and CCSRs need to distinguish which installations do not have a generated invoice. The new “Install Complete – No Invoice” filter shows installations where the subcontractor has not started generating their Viewpoint invoice.

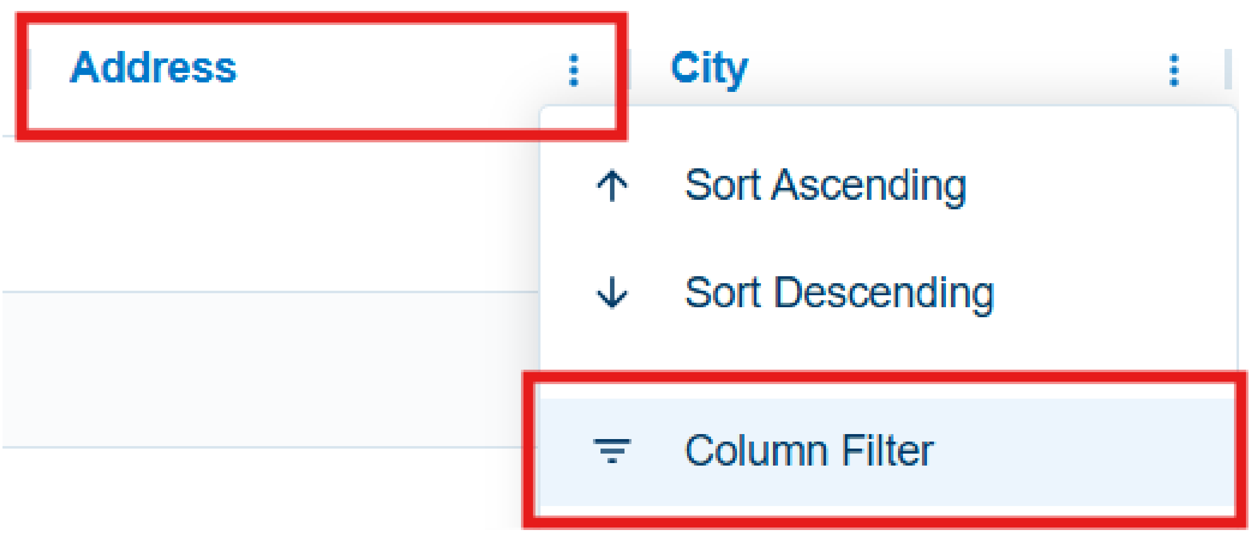

Eligibility
Leads
Audits
Work Orders
Ready For Assignment (48)
Install Assigned (104)
On Hold (44)
Material Back Order (1)
Material Ready (19)
Delayed (10)
Install Scheduled (36)
Installed - No Completion Form (14)
Install Complete (262)
Install Complete - No Invoice (211)
INSTALL COMPLETE - NO INVOICE
Total Assignments
211
Total Project Value
$1,196,553.94
Quick Search Results...
Status
Status Date
Install Complete 03/10/2026
Install Complete 04/21/2026
Install Complete 06/04/2026
Install Complete 06/03/2026
Install Complete 04/15/2026

2.) ESR Dashboard: Odd + Even Address Number Filtering Restored

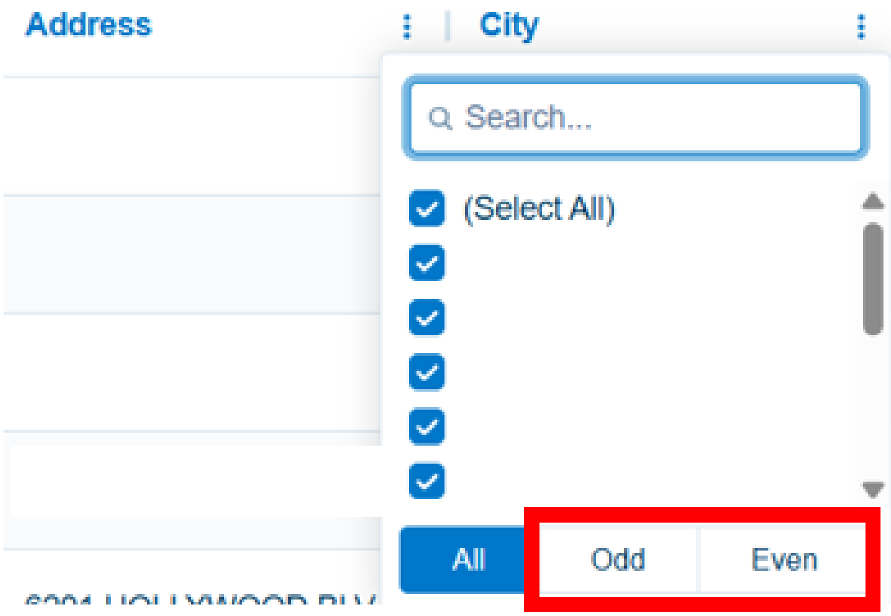
For ESRs the ability to filter records by odd or even street address numbers has been restored to the new Viewpoint tables.

How to filter by odd or even address

1. Expand the ellipsis menu next to the “Address” column header and select “Column Filter.”



2. Choose Odd or Even to display only records with odd-numbered or even-numbered street addresses.


Address
City
Search...
(Select All)
All
Odd
Even

3.) “Building Type” DDL Removed from UI

The “Building Type” dropdown, which was previously a required field when performing assessments has been removed from the “Assessment Information” page

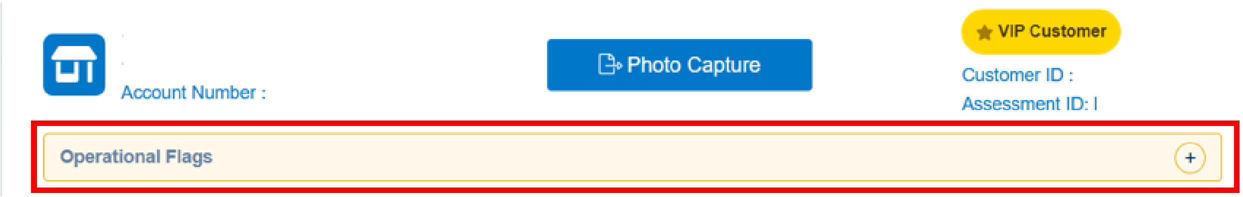
4.) Enhanced Operational Flags

Operational flags were previously located in the left side panel of the Accounts page. They have been moved into the account header at the top of the page so they remain visible no matter what phase of the workflow a customer is in. All users can add operational flags.

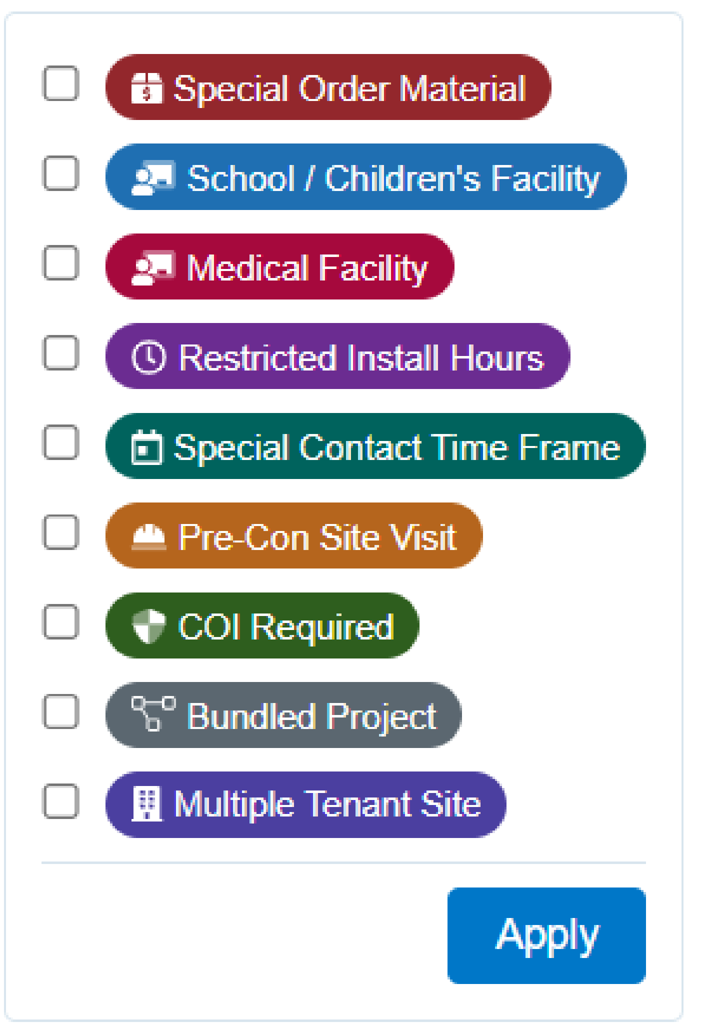
How to add an operational flag:

1. Open a customer's account record and locate the Operational Flags banner at the top of the page.

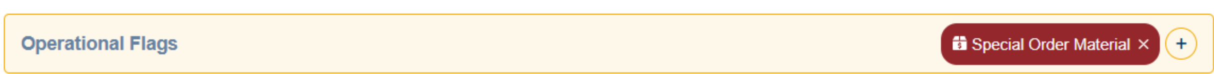
2. Click the “+” icon in the banner.



3. Choose one or more applicable flags, then click on “Apply”



The selected flag(s) appear in the account information section at the top of the page and remain visible throughout the workflow.



How to remove an operational flag

1. Click the “X” next to the flag.

2. Confirm the removal when prompted.

Any operational flag added to an account is also treated as a tag, so it becomes visible in the CSR/CCSR/UTIL workspace, the ESR dashboard, and the Auditor dashboard.

5.) CCSR: New Subcontractor Invoicing Process

Please Note: The following subcontractor organizations were not set up in the UAT environment and could not be tested before deployment: LMS, AIM Consulting, and Sierra Electric. When Sprint 100 was deployed into Production, invoices for these organizations could not be generated.

The deployment of Sprint 100 introduces a new feature that allows the CCSR to generate Installation, Permit Inspection, Additional Work, and Certified Payroll invoices within the ViewPoint platform.

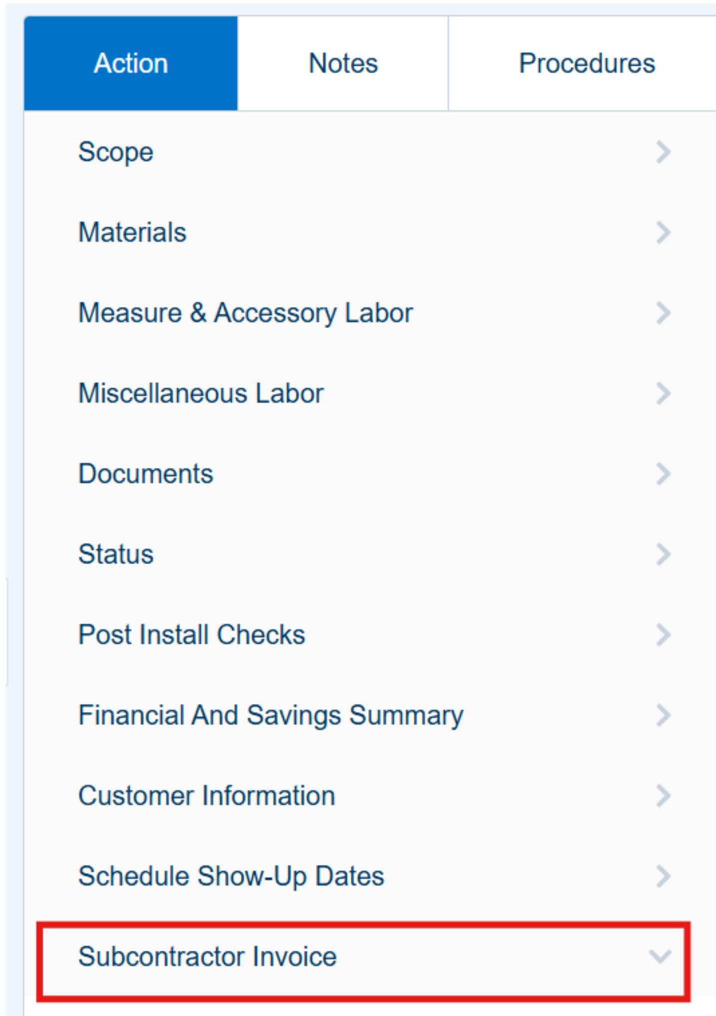
For Installation, Permit Inspection, or Additional Work invoices, the project must be in the “Install Complete” status.

Certified Payroll is not tied to an installation, so the CCSR can create these invoices at any time.

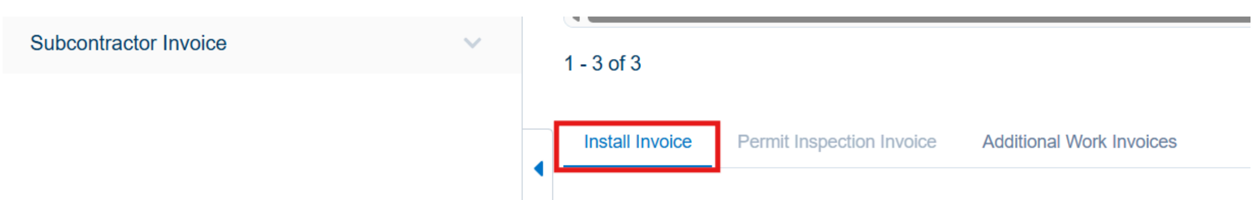
Installation Invoices

1.) When viewing the “Work Order” page, select which project to generate an invoice for

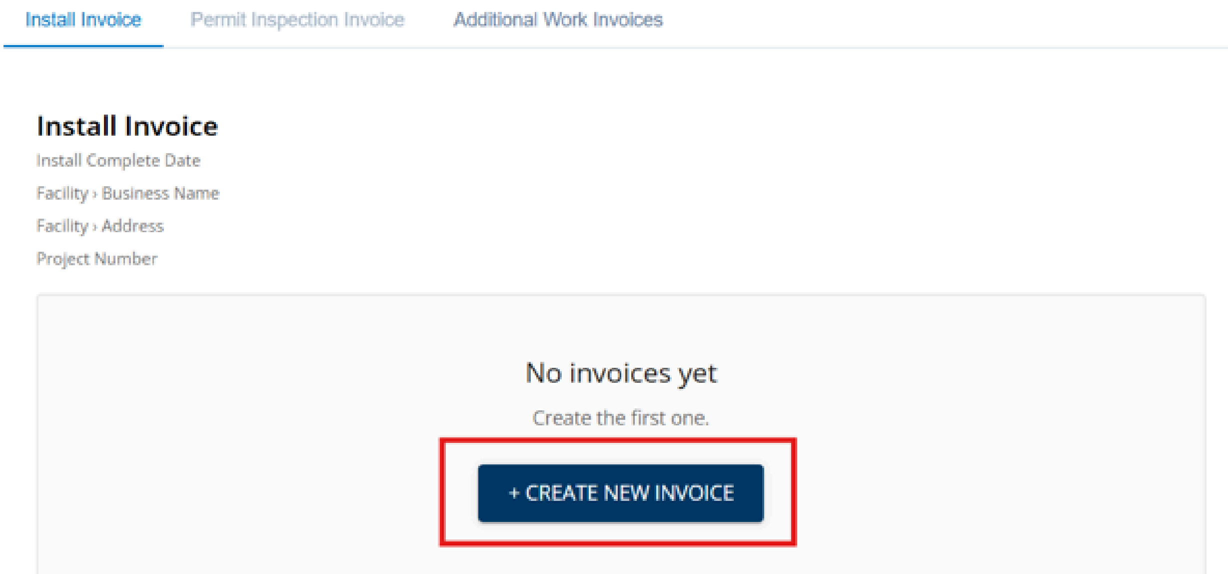
2.) From the left-hand navigation menu, click “Subcontractor Invoice”



3.) Select the “Installation Invoice” tab

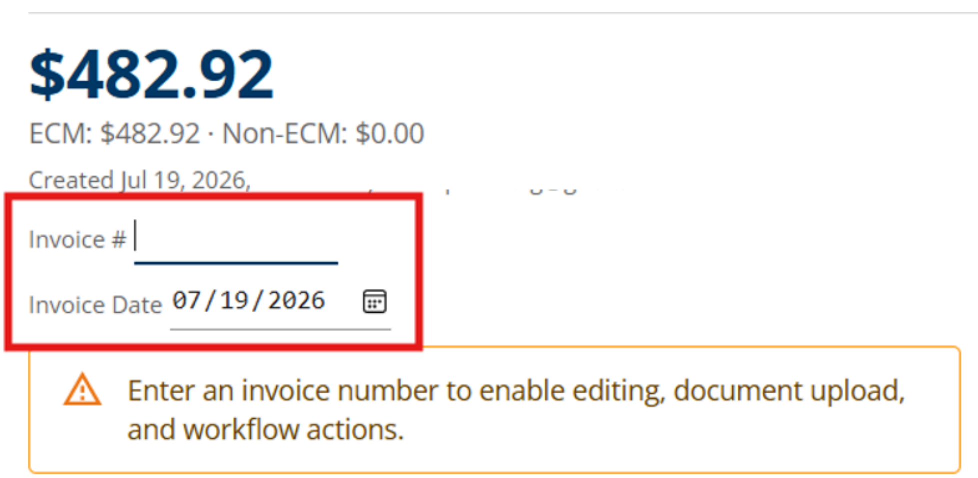


4.) Click on the “Create New Invoice” button



5.) Enter an Invoice Number. To ensure that invoice numbers are unique within a subcontractor organization, the platform automatically flags duplicate numbers. CCSRs do not need to manually track which numbers have already been used for invoicing.

6.) Set the Invoice Date.



7.) Review the “ECM Line Item” section. This section is read-only and is automatically populated from the Line Item Summary associated with the work order. If changes need to be made to the Line Item Summary, contact the

Willdan CSR so they can make the necessary adjustments. You will then have to delete the invoice and recreate it. Please see the section titled “How to Delete an Invoice” for instructions on that process.

ECM Line Items (4) From Viewpoint · read-only

Item #	Description	Qty	Rate	Amount
36	Industrial (1) 4 ft 15 Watt T8 LED BiPin Lamp(s) Type C with Dimming Driver(s)	4	$43.35	$173.40
48	Industrial (2) 2 ft 8.5 Watt T8 LED BiPin Lamp(s) with Reduced Power HE Electronic Ballast(s)	1	$49.42	$49.42
51	Industrial (2) 4 ft 15 Watt T8 LED BiPin Lamp(s) Type C with Dimming Driver(s)	4	$43.35	$173.40
51	Surface Wrap (2) 4 ft 15 Watt T8 LED BiPin Lamp(s) Type C with Dimming Driver(s)	2	$43.35	$86.70
			ECM Subtotal	**$482.92**

Non-ECM Line Items (0) + ADD LINE ITEM

No non-ECM line items yet.

8.) To invoice for costs that aren’t tied to installed measures, such as show-up pay, lift rental feels, and tombstone charges, use the “Non-ECM Line Item” section:

Non-ECM Line Items (0) + ADD LINE ITEM

No non-ECM line items yet.

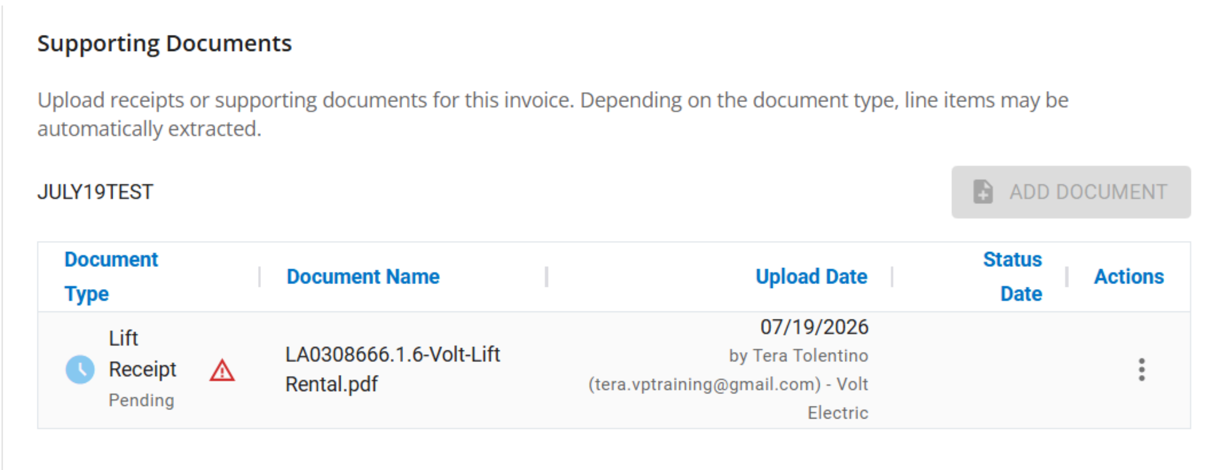
<u>How to Extract Non-ECM Fees from Supporting Documents:</u>

- Navigate down to the “Supporting Documents” microapp and click on the

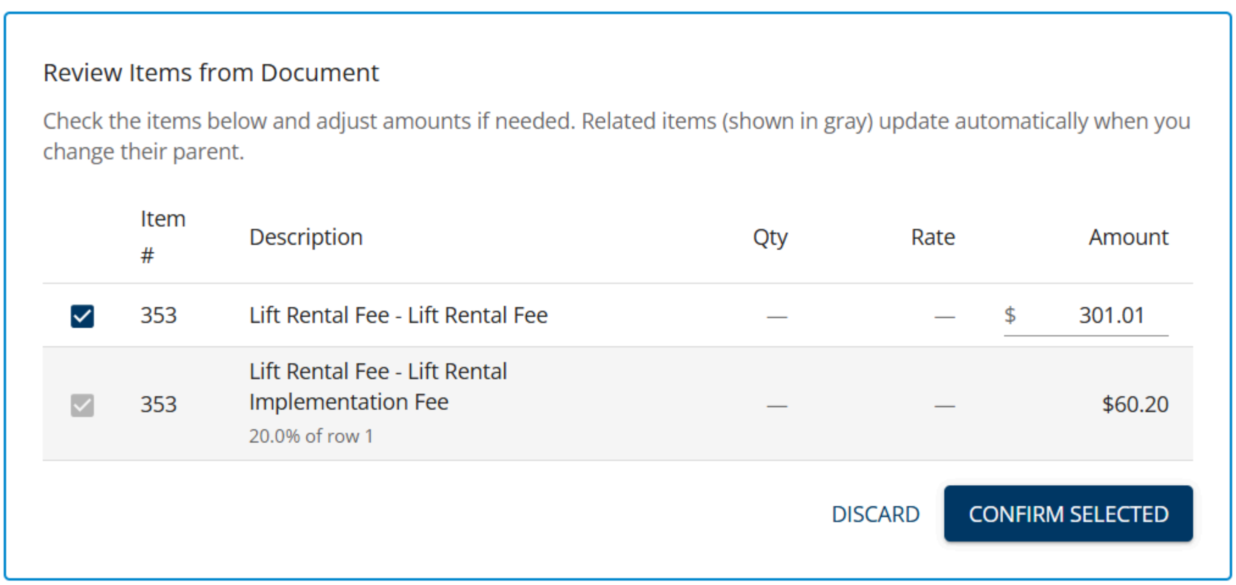
“Add Document” button to upload either a lift rental receipt or tombstone receipt

- Depending on the document type, the platform may automatically extract line items and their associated costs directly from the uploaded file.

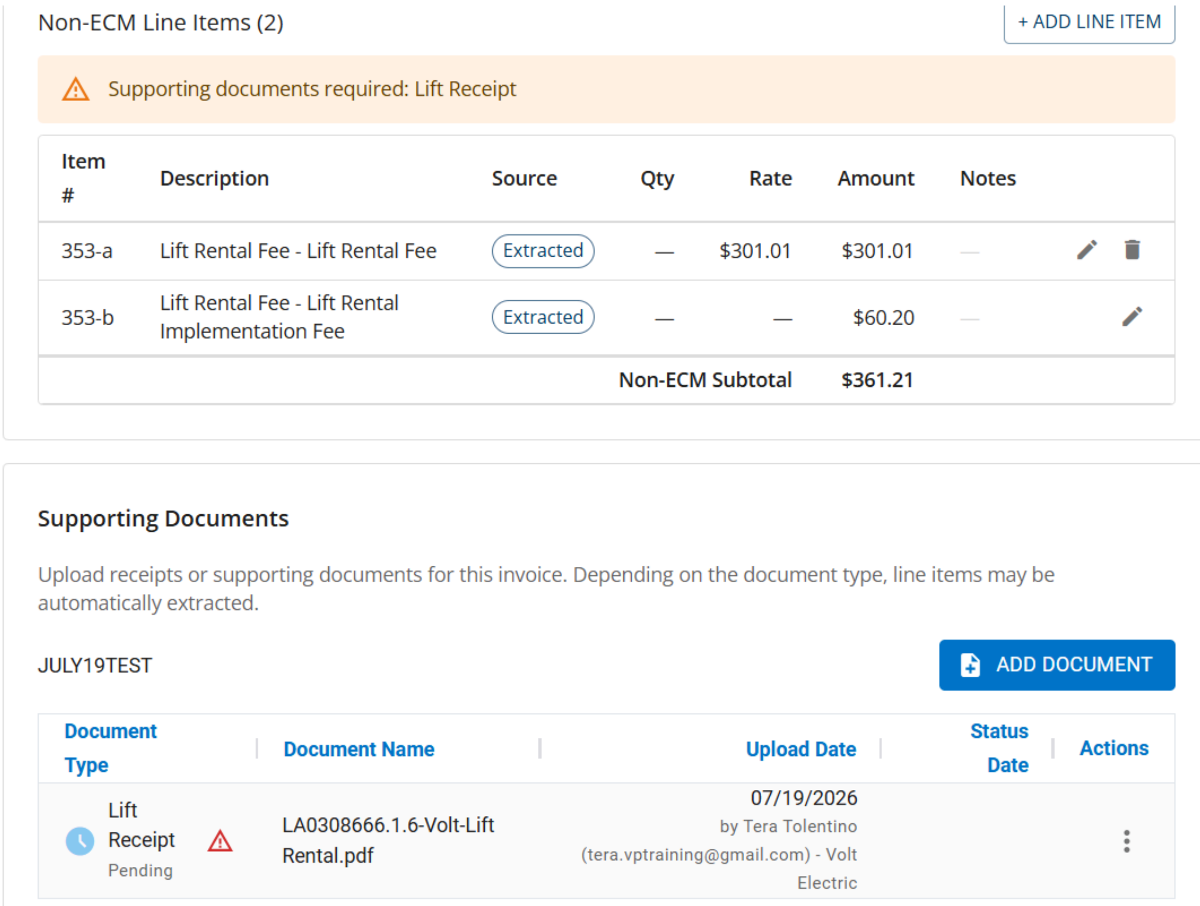
> ***Note:*** *If the platform detects a discrepancy between the project and the uploaded document — such as a different customer name or address than the one associated with the invoice — a hazard/warning icon will display. Reviewing and proceeding past this warning is at your discretion.*



- A prompt will appear above the Supporting Documents section showing the line item(s) extracted from the document, including the extracted amount and any automatically calculated fees (for example, a 20% implementation fee applied to an extracted lift rental amount).



- Review the extracted values for accuracy. Click Discard if the extracted information is incorrect, or Confirm to accept it and have the line item appear in the “Non-ECM Line Items” table

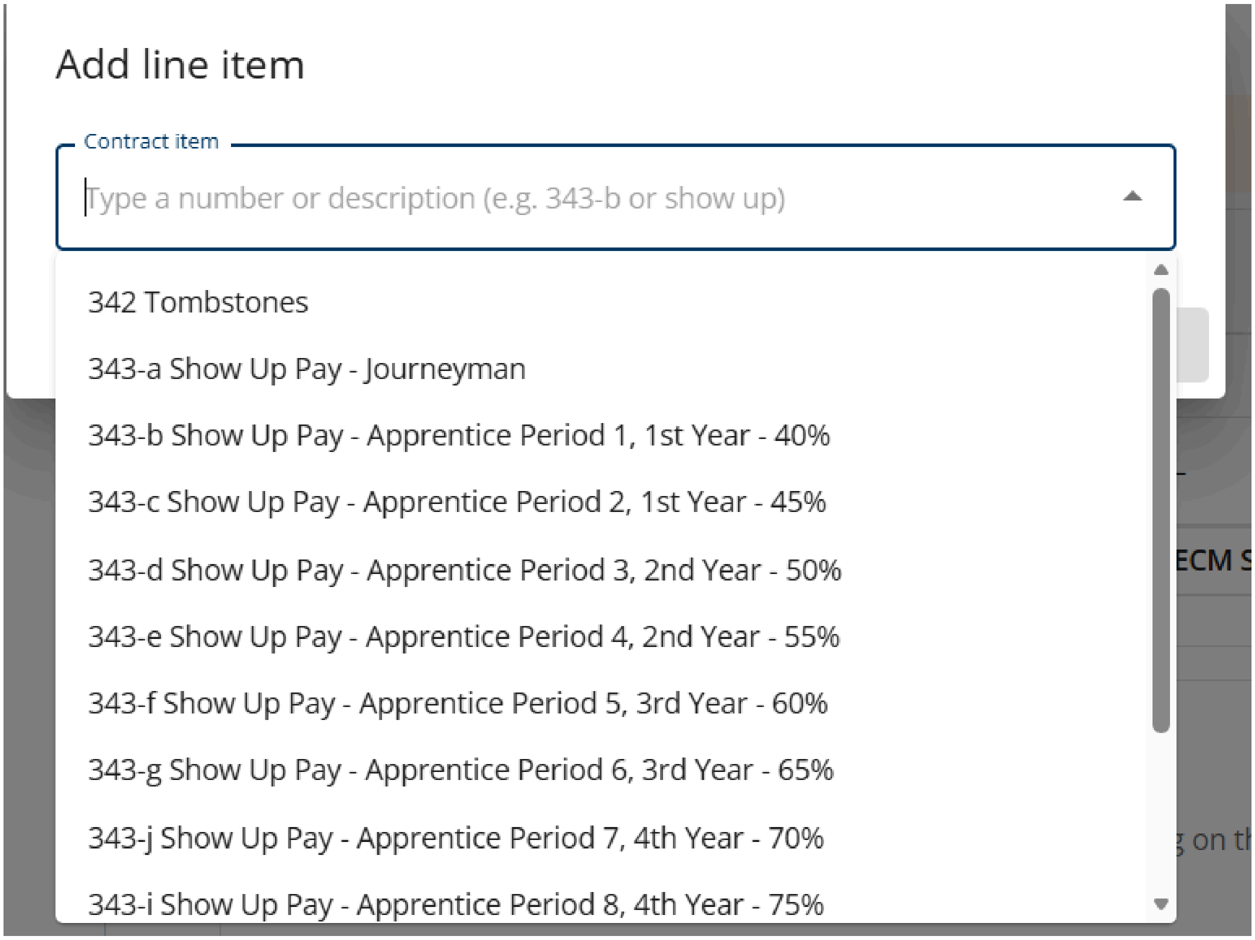


<u>How to Manually Enter Non-ECM Line Items:</u>

When invoicing for Show-Up Pay, time must be manually entered. When manually entering fees for lift rentals or tombstones, make sure to attach a corresponding supporting document

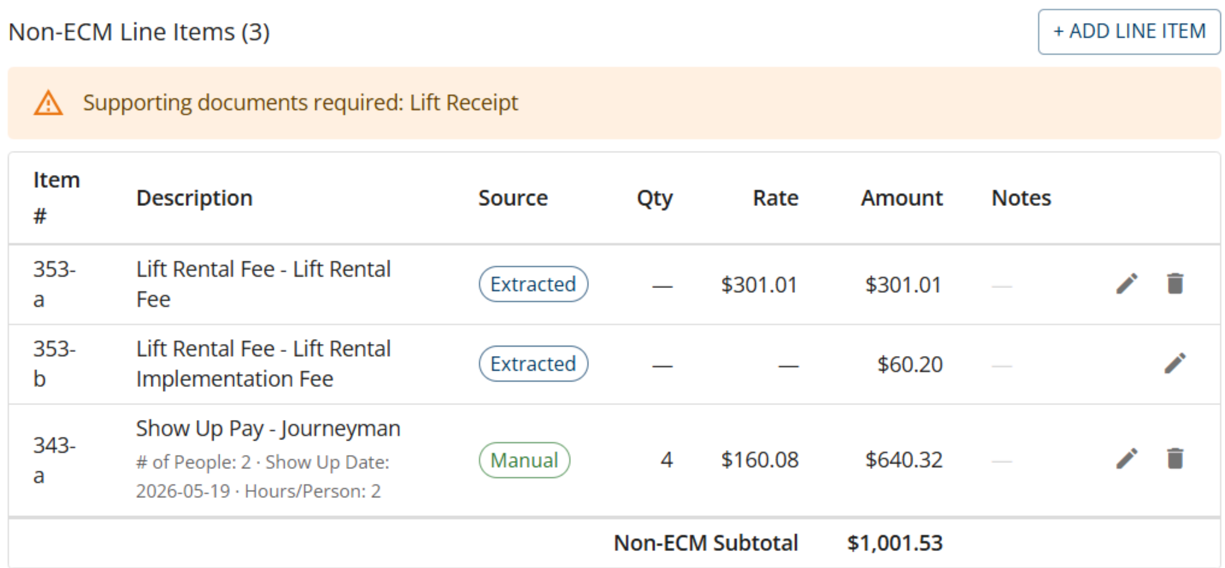
- Click on the “Add Line Item” button.

- Make a selection from the Contract Item dropdown to access the appropriate modal for invoicing hours or items.

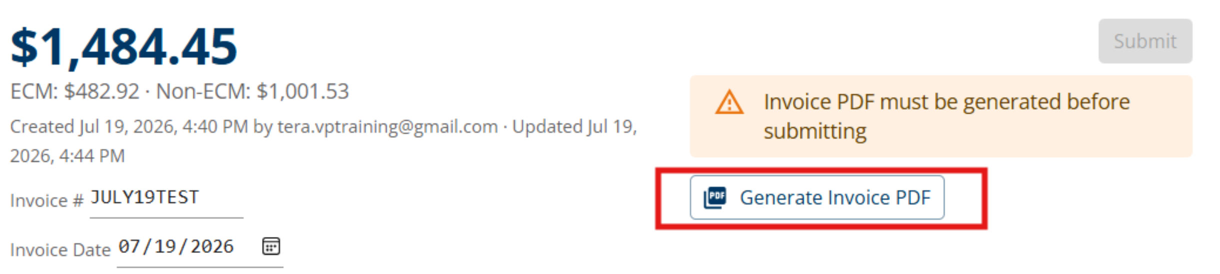


- Enter any additional notes for the line item, then click on the “Add” button

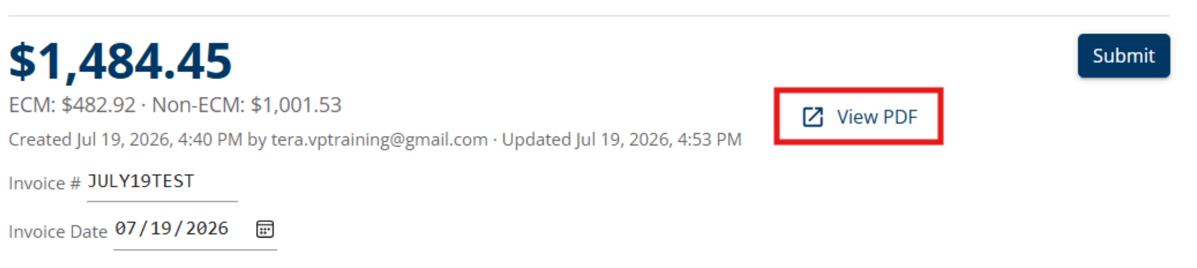
  Note: *When a Non-ECM Line item is added, the table shows the item’s description, Source (Manual or Extracted), and any notes. Use the pencil icon to edit a line item or the trash can icon to delete it.*



9.) Once the ECM and Non-ECM line items are complete and accurate, scroll up and click Generate PDF Invoice.

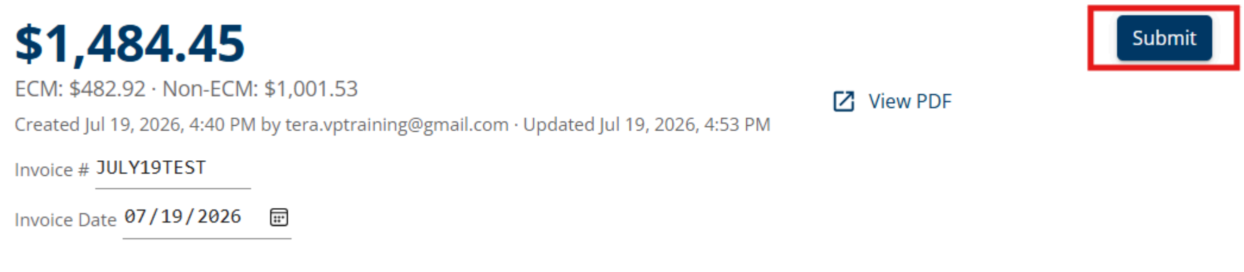


10.) After the platform finishes generating the document, click “View PDF” to review the invoice as it will appear based on the ECM line items and any Non-ECM items added.



11.) If the invoice looks correct, return to the platform window and click on the

“Submit” button.



12.) The invoice will display a purple “Submitted” badge, indicating it's now available for the Willdan team to review.

13.) If any corrections need to be made, make adjustments within the Invoice Builder and re-generate the invoice, then click on the “Submit” button

<u>Permit Inspection Invoices</u>

The process for generating Permit Inspection Invoices is similar to the the Installation Invoice process outlined above. Enter invoice details, add line items and attach supporting documents, then generate and submit the invoice PDF.

Before you begin the process of generating a Permit Inspection Invoice, make sure your work order permits have been entered in the Documents section of the work order view.

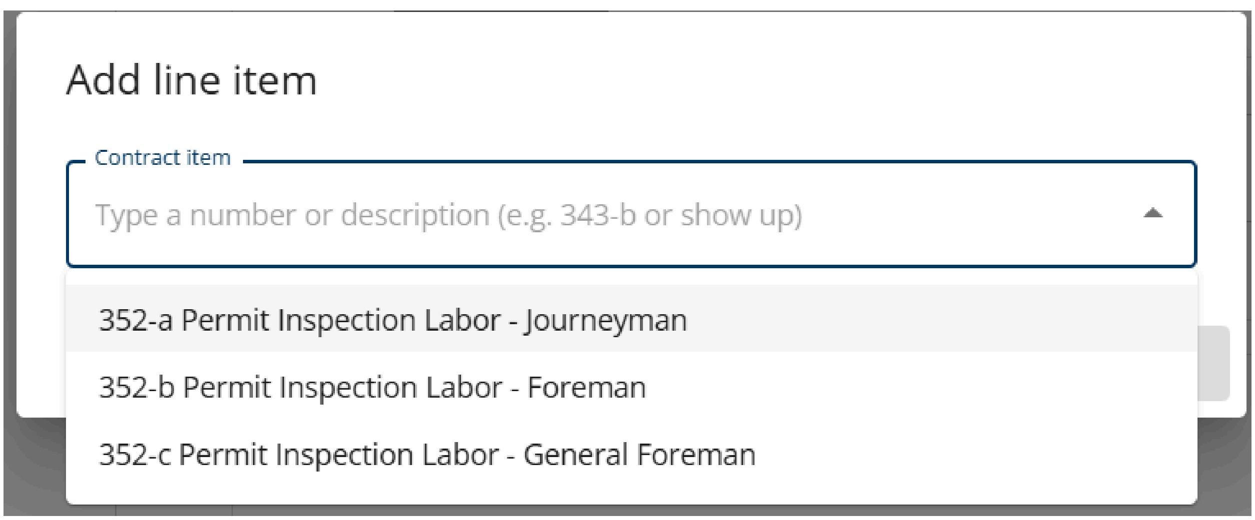
<u>Steps:</u>

1.) Navigate to the Subcontractor Invoice page and click the Permit Inspection Invoice tab, then click Create New Invoice.

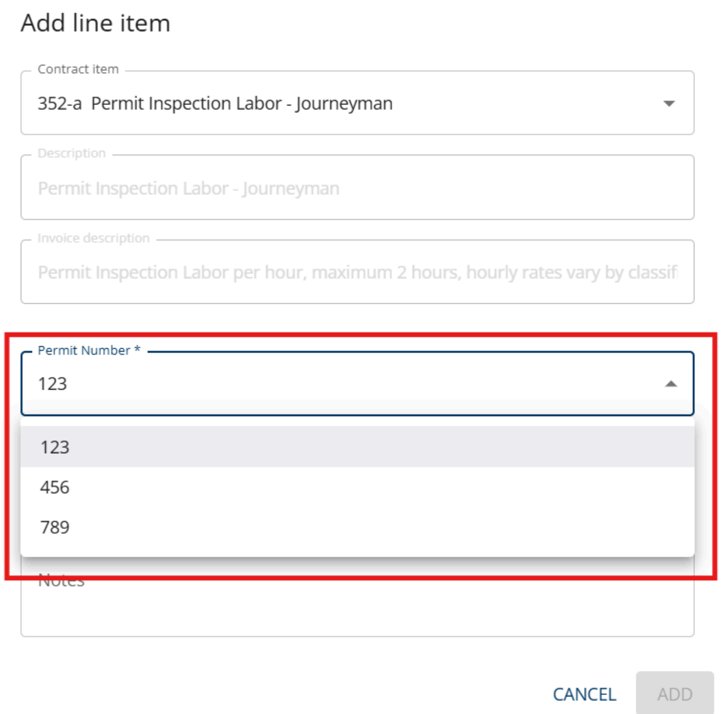
2.) Enter an Invoice Number and the Inspection Date

3.) In the Non-ECM Line Items table:

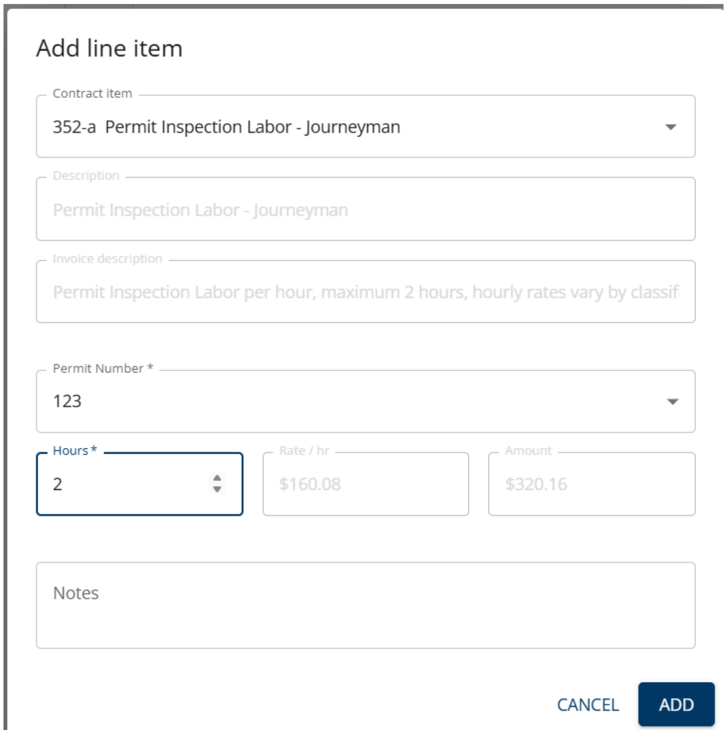
- Click on the “Add Line Item” button
- Select the classification of the person who performed the inspection (Journeyman, Foreman, or General Foreman)



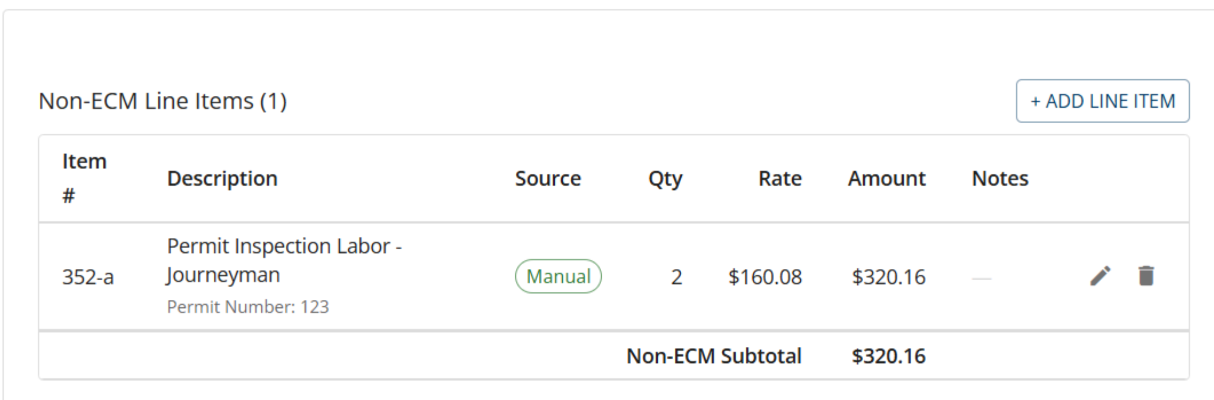
- Choose the correct permit from the “Permit Number” dropdown (If the installation has multiple permits, make sure to select the correct permit number)



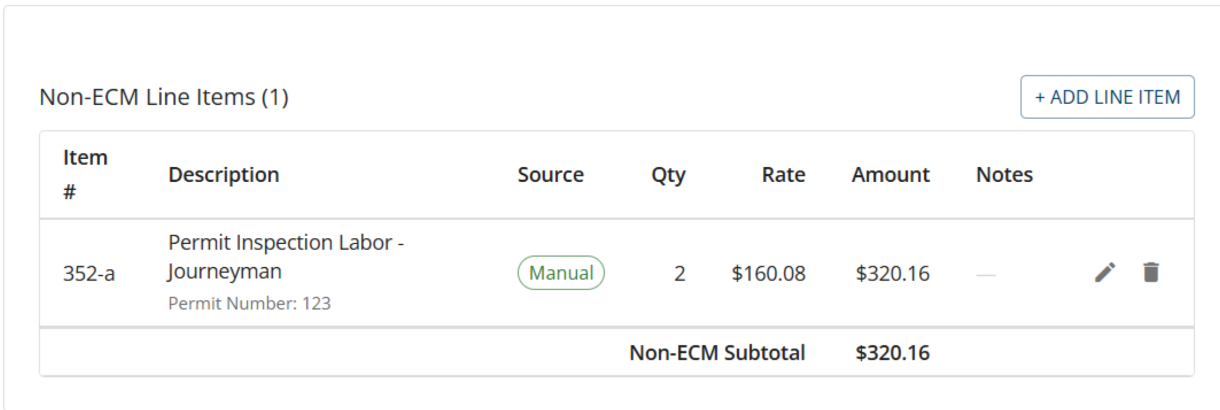
- Enter the number of hours; the rate and amount calculate automatically based on the classification and hours entered.
- Add any relevant notes
- Click on "Add"

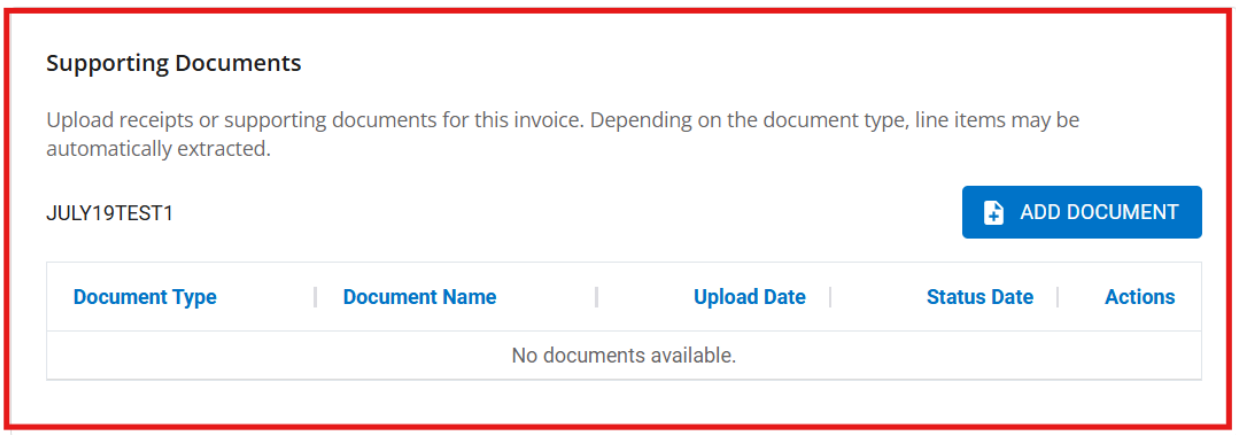


- Repeat for each permit inspection performed on the job.



4.) Upload the permit itself as a supporting document, the same way you'd upload a supporting document on an Installation Invoice. Proof should be uploaded for every permit associated with the job.

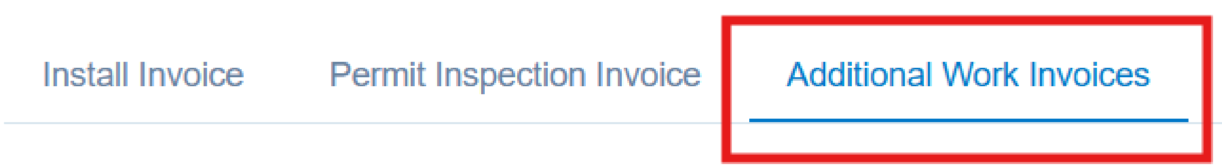




5.) Generate the PDF, review it with View PDF, and submit

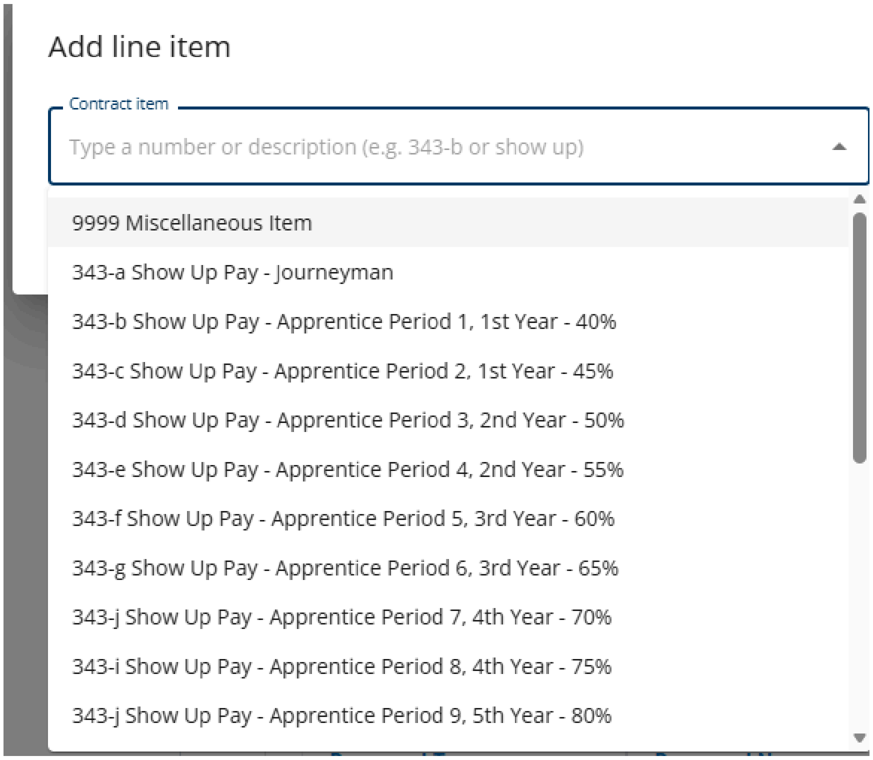
<u>Additional Work Invoices</u>

1.) Navigate to “Subcontractor Invoice” page, select the “Additional Work Invoices” tab, and click Create New Invoice.

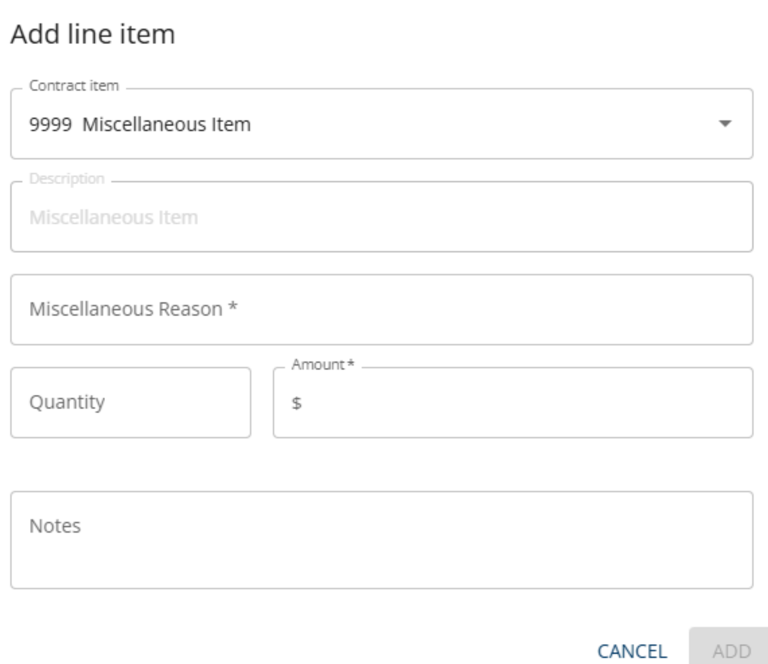


2.) Enter the Invoice Number and Invoice Date

3.) In the “Non-ECM Line Items” table, click “Add Line Item” and choose the applicable option: Miscellaneous Item, Show-Up Pay, Warranty/Service Call Labor (with the appropriate tech classification)



4.) If you select Miscellaneous Item, enter a description of what the item is (for example, additional materials that weren't shipped or otherwise covered by regular material distribution), then enter the amount and any relevant notes.



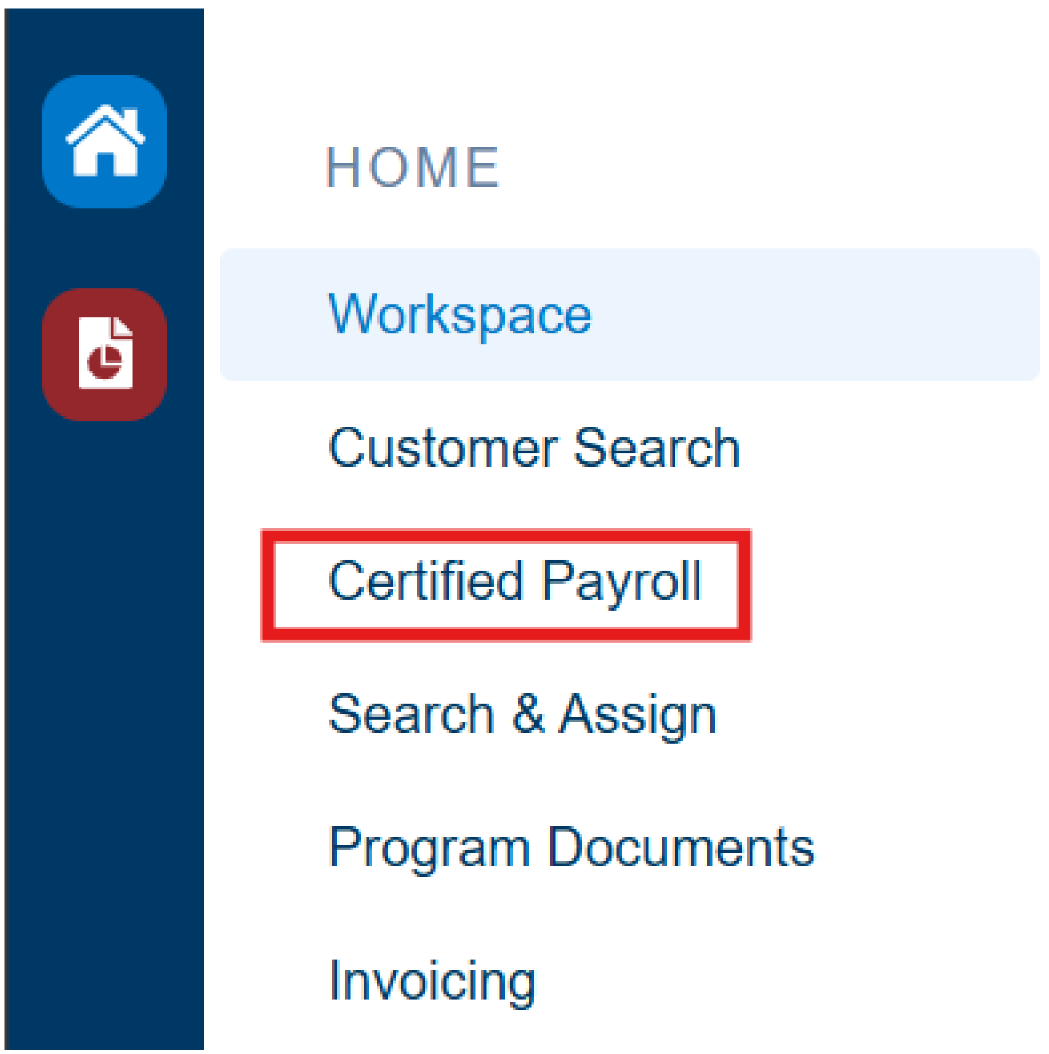
5.) Upload supporting documents for the invoice — this is especially important for "Miscellaneous Item" line items, where you'll want to attach the receipt or documentation for whatever is being invoiced.

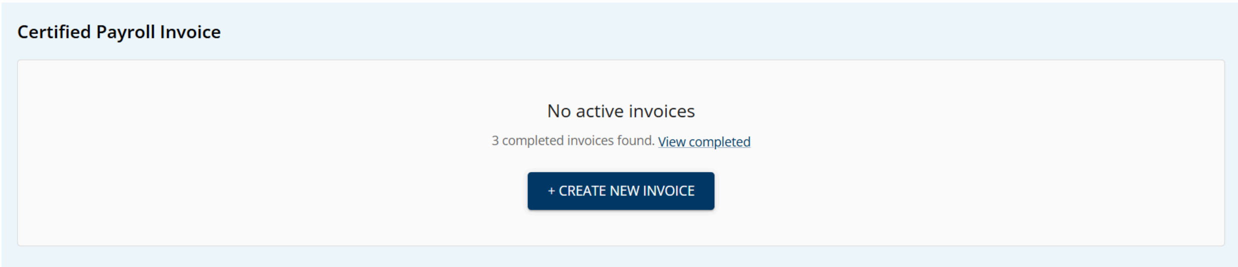
6.) Generate the PDF, review it, and submit

Certified Payroll Invoices

Certified Payroll invoices share the same generate/submit rhythm as the other three, but they start from a different part of the platform and don't depend on a work order's status.

1.) Click the Home icon in the top left after logging in, then select Certified Payroll.

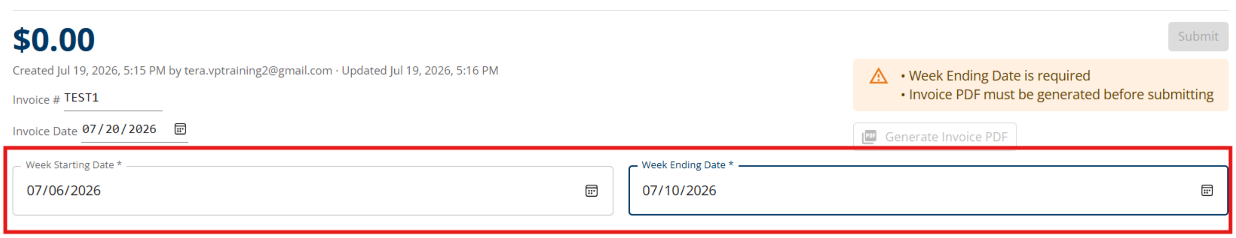




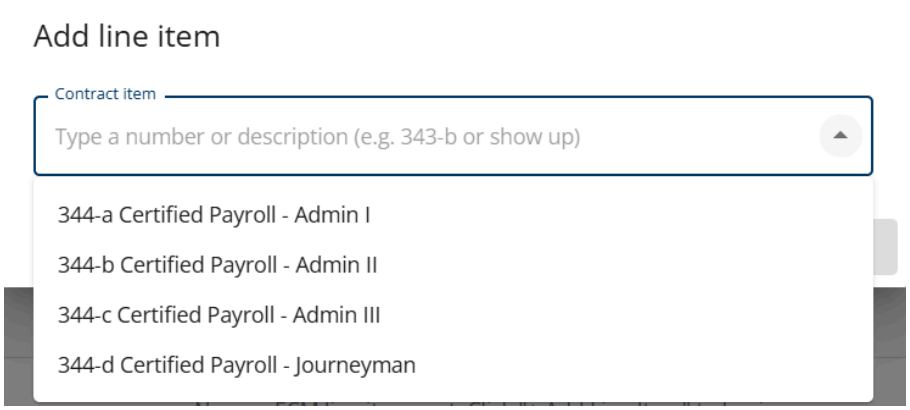
Note: From here, you can click the “View Completed” link to view all invoices you've already submitted or have in progress

2.) Click “Create New Invoice”, then enter the Invoice Number and the Invoice Date you'd like to appear on the generated document.

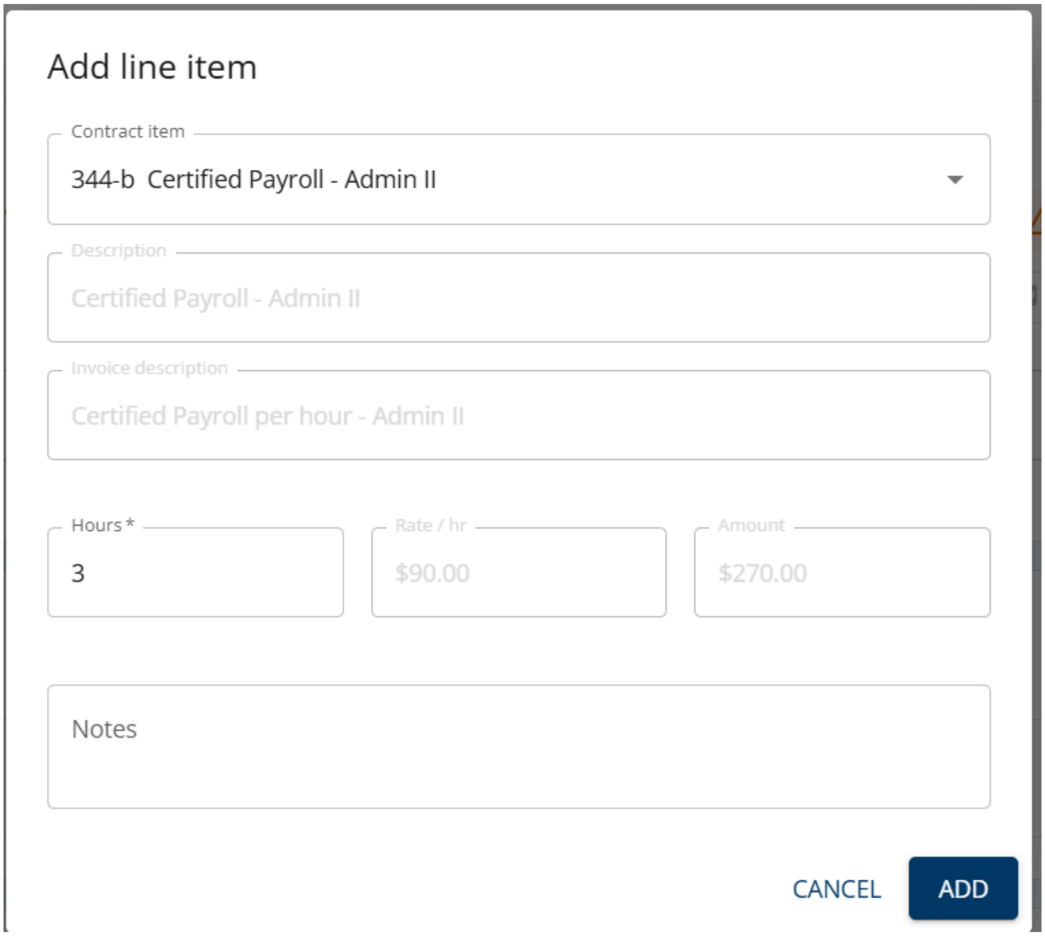
3.) Enter the Week Starting and Week Ending dates for the week the certified payroll work was performed either by typing them in or using the calendar date picker.



4.) In the “Non-ECM Line Items” table, click “Add Line Item”, select “Certified Payroll”, and choose the applicable classification (Admin 1, Admin 2, Admin 3, or Journeyman).

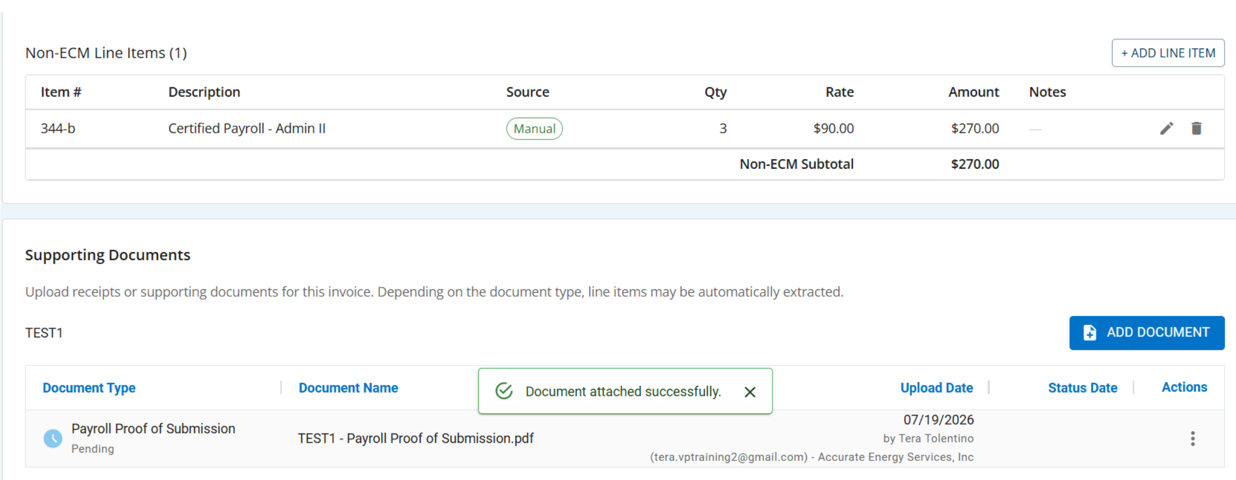


5.) Enter the number of hours spent doing Certified Payroll, and the platform will calculate the amount automatically based on the classification's rate.



6.) Add any applicable notes.

7.) Upload a supporting document backing up the payroll invoice

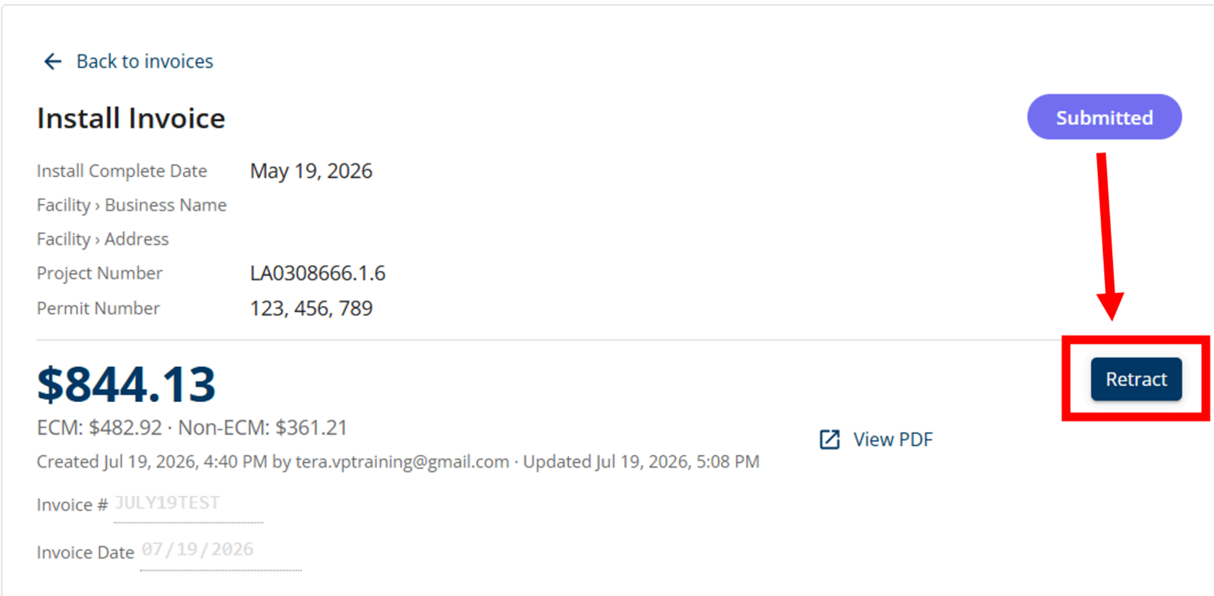


8.) Review the line items and supporting documents, generate and review the PDF, then submit

Making Changes After Submission

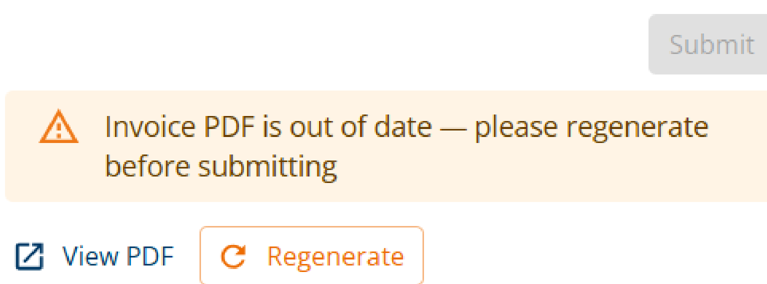
Follow the steps outlined below if a change is needed after an invoice has been submitted

1.) Click on the "Retract" button.



2.) Make the necessary changes

3.) The previously generated PDF will no longer match the updated information, and users will be prompted to regenerate it. Click "Regenerate"



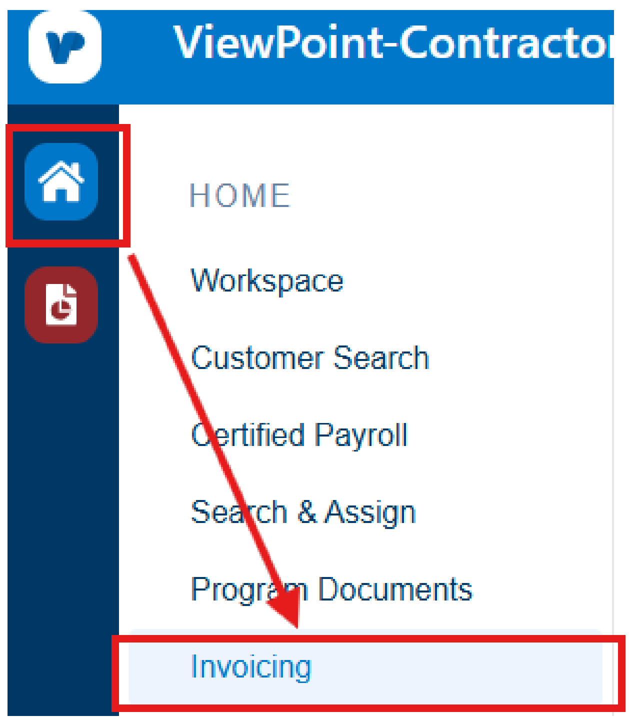
4.) Review the newly generated PDF and click on the “Submit” button to resubmit the corrected invoice.

<u>New “Invoices” Page Allows CCSRs to Track Invoice Statuses</u>

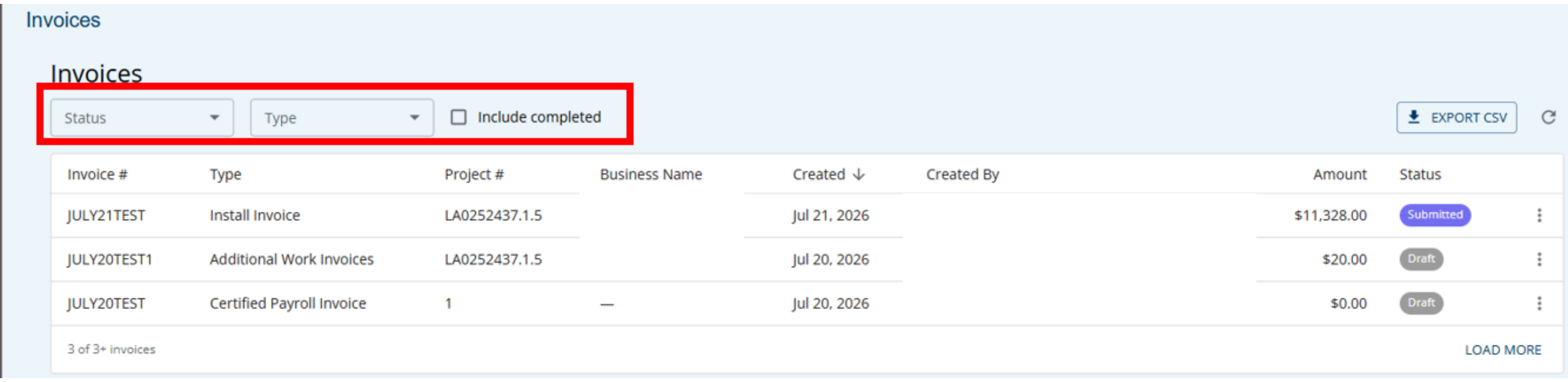
The new Invoices page gives subcontractors full visibility into every invoice they've generated or submitted, along with its current status in the review process. Subcontractors should visit this page to see if any invoices need revising or have been denied.

Please Note: Invoices **<u>cannot</u>** be deleted or revised from this page. Please see the section below for instructions on how to delete invoices.

1.) To access the “Invoices” page, click on the “Home” Icon and select “Invoicing”



2.) The Invoices page displays all invoices generated using the new subcontractor invoicing process. Records can be sorted by status or invoice type



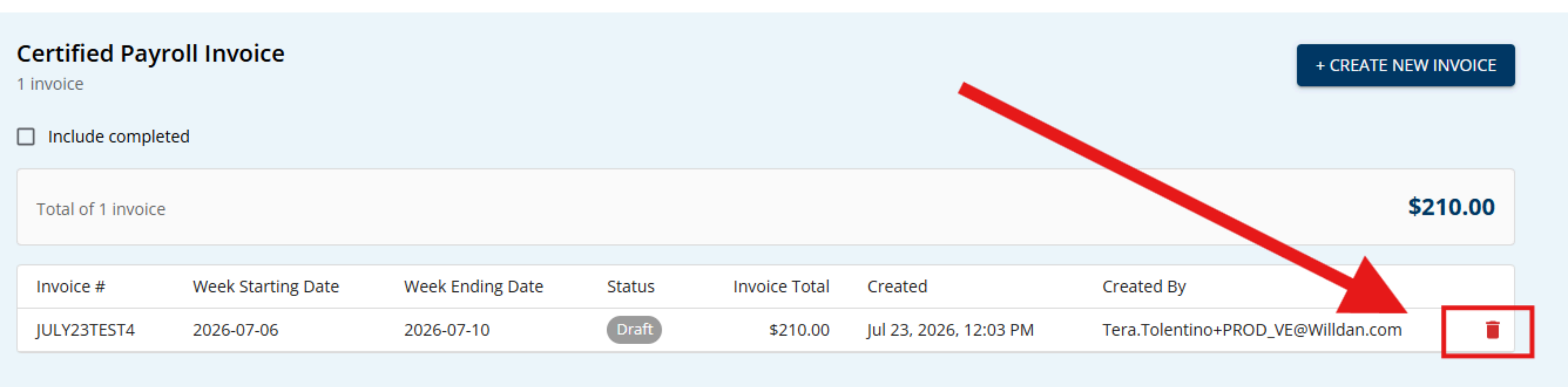
How to Delete an Invoice

1.) To delete an invoice, navigate to the screen where the invoice was originally generated and view the invoice details page.

- For Installation, Permit Inspection, and Additional Work Invoices – return to the specific work order's page.
- For Certified Payroll Invoices – return to the Certified Payroll Invoicing page.

2.) After correctly accessing the invoice details pages, retract the invoice and click on "<-- Back to Invoices" in the top left corner

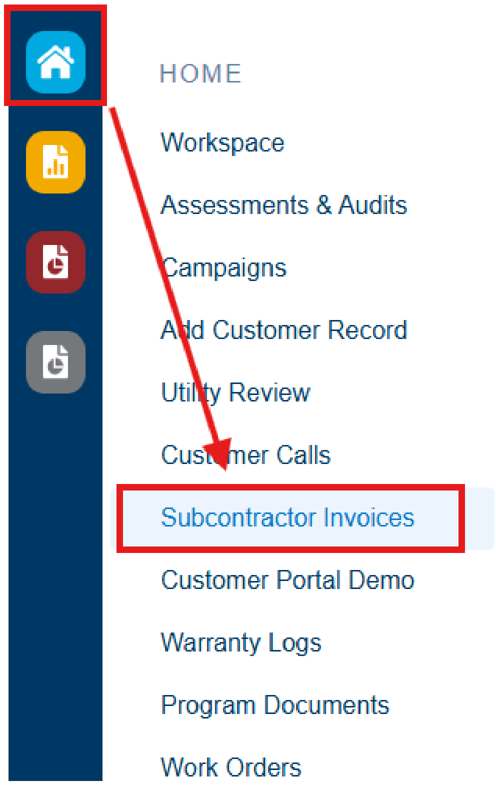
3.) Once you have accessed the Invoices table, click on the trash icon next to the invoice you would like to delete



6.) CSR: New Subcontractor Invoice Approval Process

To review, process, and approve subcontractor installation, permit inspection, additional work, and certified payroll invoices using the new ViewPoint-based invoicing process, follow the steps outlined below.

1.) From the home screen, click the Home icon and click on Subcontractor Invoices.

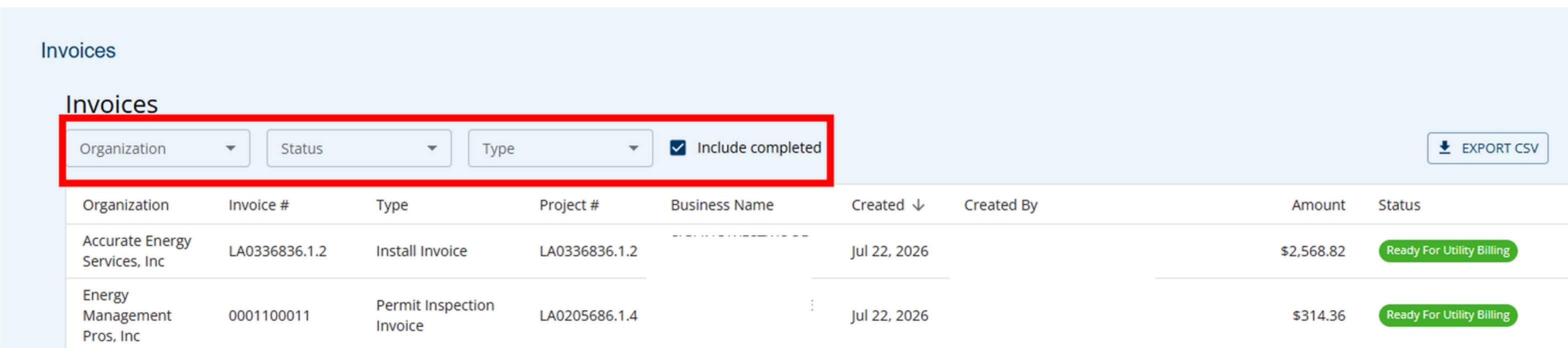


The table on this page displays all invoices that have been submitted and are currently in the process of being reviewed.

Use the following filters to organize the list of invoices:

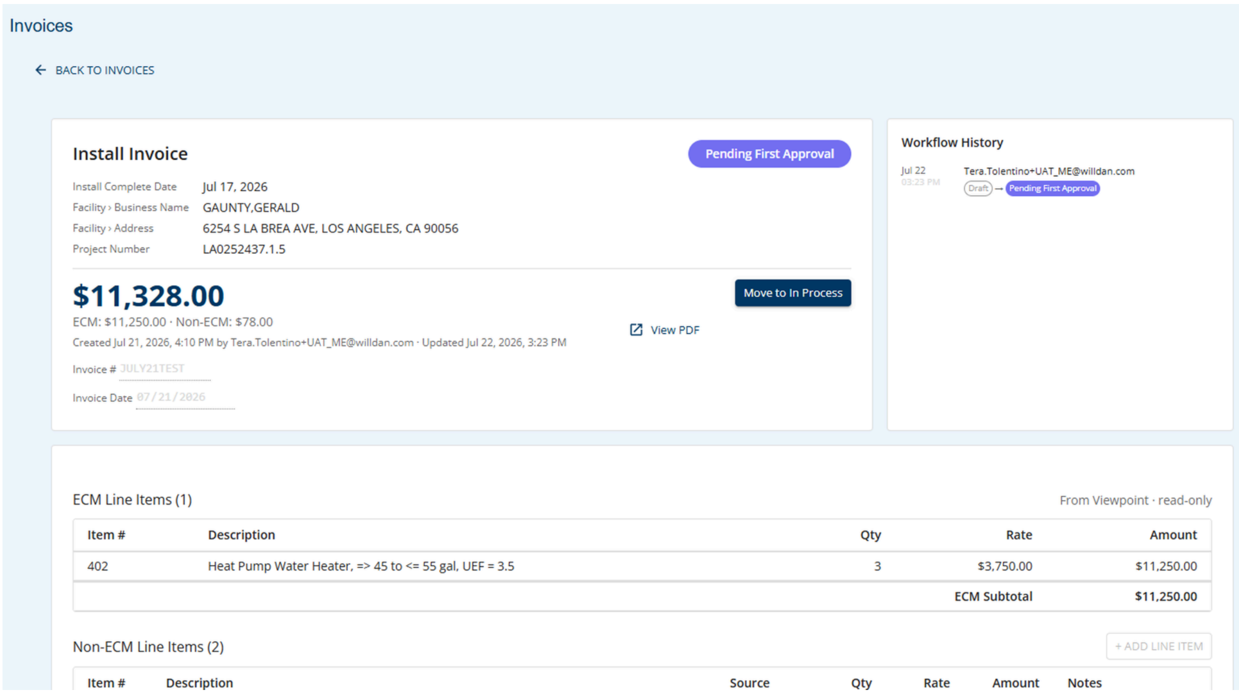
- Organization drop-down list
- Status of the invoice
- Review status of the invoice
- Type of invoice

Note: To see invoices that have already been approved for billing, select the Include Completed checkbox. This will display everything that has been processed and is ready for utility billing.



2.) After a subcontractor submits an invoice, it appears with a status of Pending First Approval. Click the invoice you would like to review to open the invoice detail window and begin the review process.

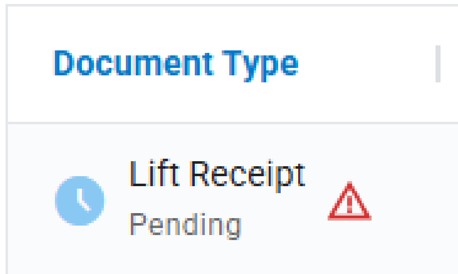
Invoice Detail Window:



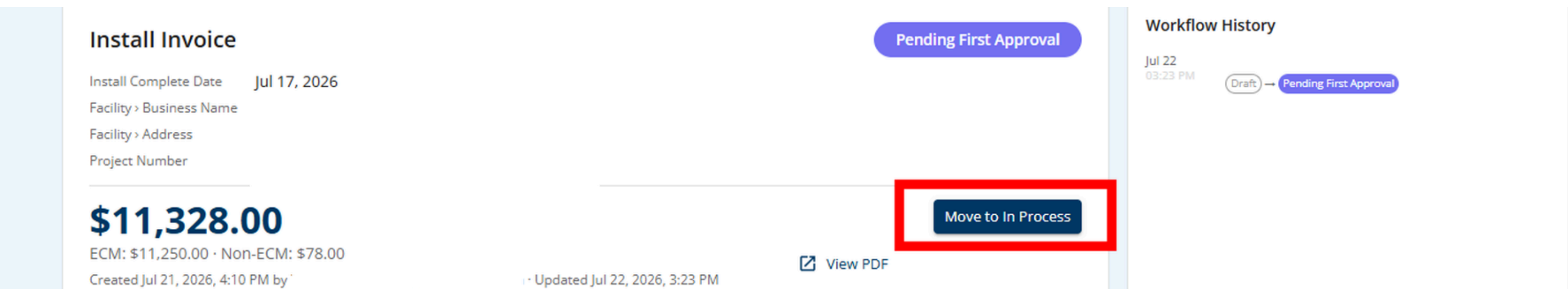
In the invoice detail window, you can review:

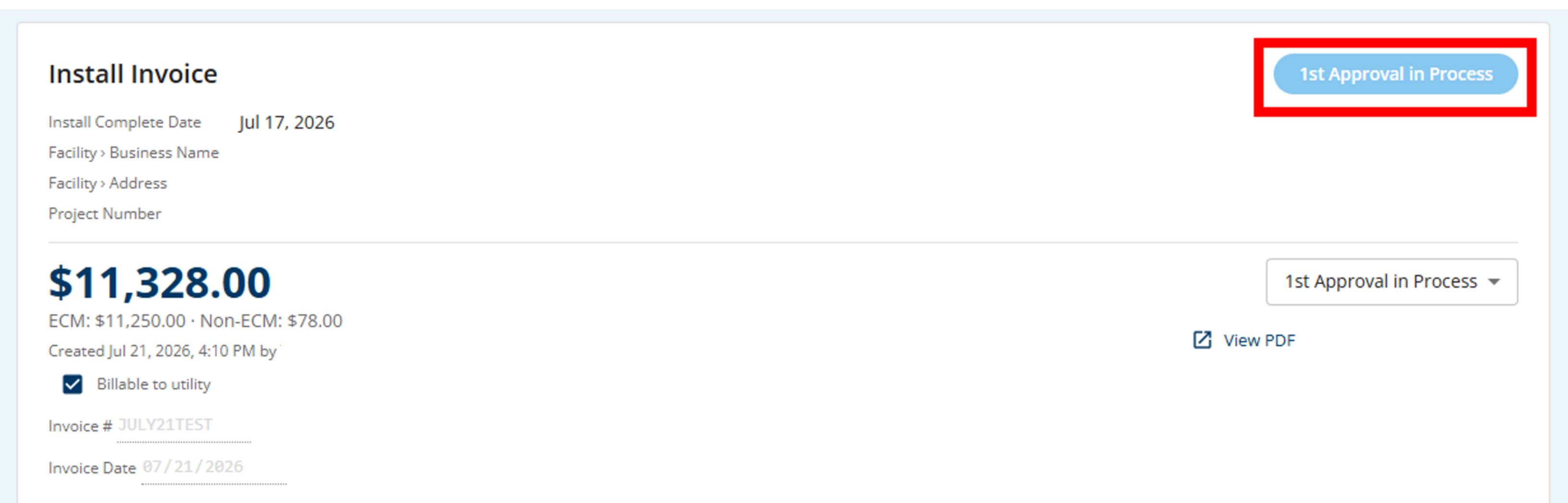
- The project number (reference this for the review)
- The PDF generated by Viewpoint — click View PDF to open it
- The ECM line items table, pulled from the work order line item summary
- The non-ECM line items, which show whether each item was extracted from a supporting document or entered manually
- The Supporting Documents micro-app, where you can view documents uploaded by the subcontractor

Note: If there is a discrepancy between what the subcontractor uploaded and the known information about the installation, a hazard symbol will appear to flag the discrepancy. Example:



3.) Click Move to In Process to formally begin the review. This changes the invoice status to First Approval – In Process.





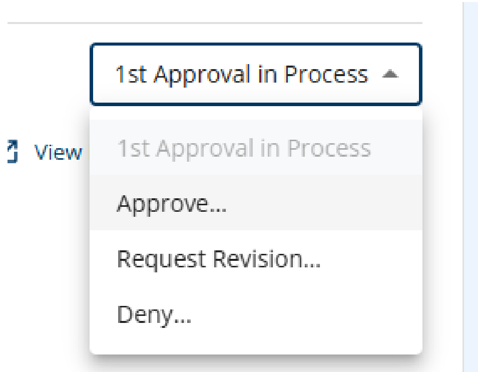
4.) After beginning the review process and reviewing the invoice details, users have three options:

- Approve — escalates the invoice to the next phase of review

- Request a Revision — sends the invoice back to the subcontractor so they can make changes, regenerate, and resubmit it

- Deny –

Note: A comment is required whenever you select Request a Revision or Deny.



4.) Selecting Approve from the drop down list means the invoice has passed the first round of review and will escalate the invoice to a second round of review and approval. The cost of the project dictates what tier of approval is required:

1st Tier Approval: Under $100K

2nd Tier Approval: Greater than or Equal to $100K, Less than $500k

3rd Tier Approval: Greater than or Equal to $500K

5.) Regardless of which tier of approval an invoice requires, the second review will have the following options:

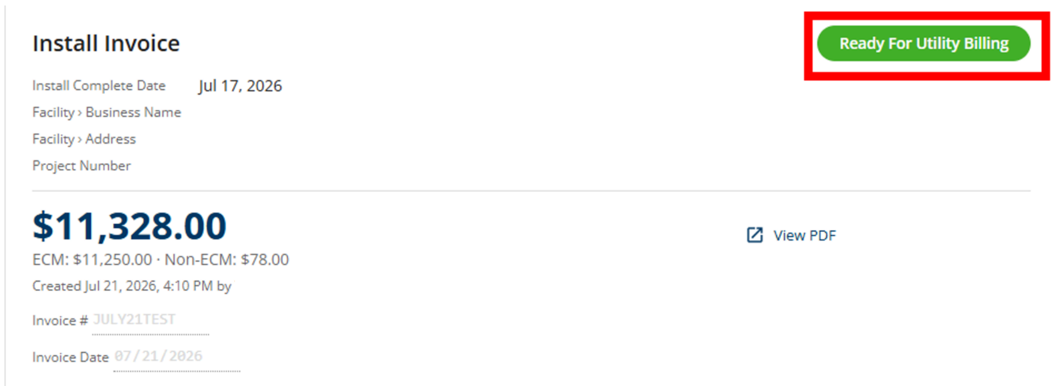
- Approve — Mark the invoice as Ready for Utility Billing
- Request a Revision — sends the invoice back to the subcontractor so they can make changes, regenerate, and resubmit it
- Deny

6.) Approving the invoice after the second round of review will mark it as Ready for Utility Billing. The invoice will appear in the Utility Invoice Builder when:

- The Work Order status is set to Install Approved

Work Order ID	REC Type	Status
LA0369922.1.4	Retrofit Lighting	Ready For Assignment
LA0369922.1.3	Permit Lighting	Install Complete
LA0369922.1.7	HPWH-Electrician	Install Approved

- The invoice is marked as Ready for Utility Billing using this new process



Note: Marking an invoice as Approved during its second review cannot be undone

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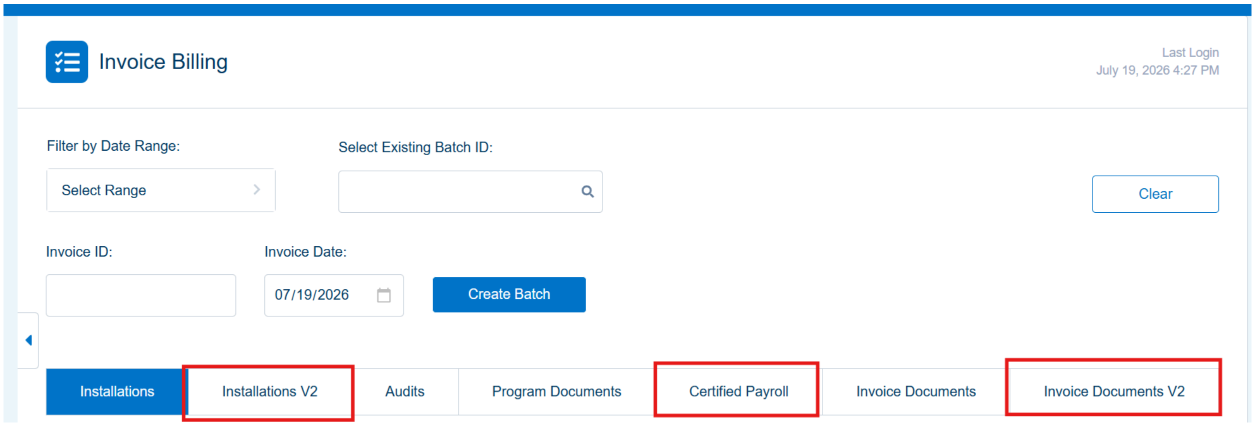
Release Notes

JULY 23, 2026

7.) FIN: Utility Invoice Builder Now Supports the New Subcontractor Invoice and Approval Process

The Utility Invoice Builder now includes three additional tabs:

- Installations V2
- Certified Payroll
- Invoice Documents V2



These tabs display invoices that have been generated using the new ViewPoint-based subcontractor invoicing and approval system.

The Original “Installations” and “Invoice Documents” tabs remain and display invoices and documents that progressed using the old process. Over time, these tabs will be phased out in favor of their V2 counterparts.

The “Audits” and “Program Documents” tabs will remain in the Utility Invoice Builder until these aspects of the workflow are converted to the new invoicing process.

How to create an invoice batch:

The process to create invoice batches and mark them as billed remains the same, and users can create batches that contain records across all tabs, regardless of how they were processed.

1.) Open the Invoice Billing screen and enter a date range.

2.) Review the lists of projects. Things to note about records displayed in the “Installations V2” tab:

- Rows with a checkbox on the far left and a side caret have a generated invoice that has cleared all approval levels and are ready to be included in a utility invoice.

- Rows without a checkbox are still in the approval process — click on the side caret next to a record to see where the job stands.

	› LA0281685.1.7
	› LA0202606.1.4

- Records that are missing a check box AND a side caret do not have a submitted invoice

	LA0202338.1.5	LA0202338.1
	LA0339590.1.3	LA0339590.1
	LA0339590.1.4	LA0339590.1

3.) Select the checkboxes for the items you want to bill.

4.) If applicable, repeat this process for the Certified Payroll tab — items the “Draft” status cannot be selected; items marked Ready for Billing can be checked. The Certified Payroll records will appear based on the week Certified Payroll services were performed – not the date it was submitted

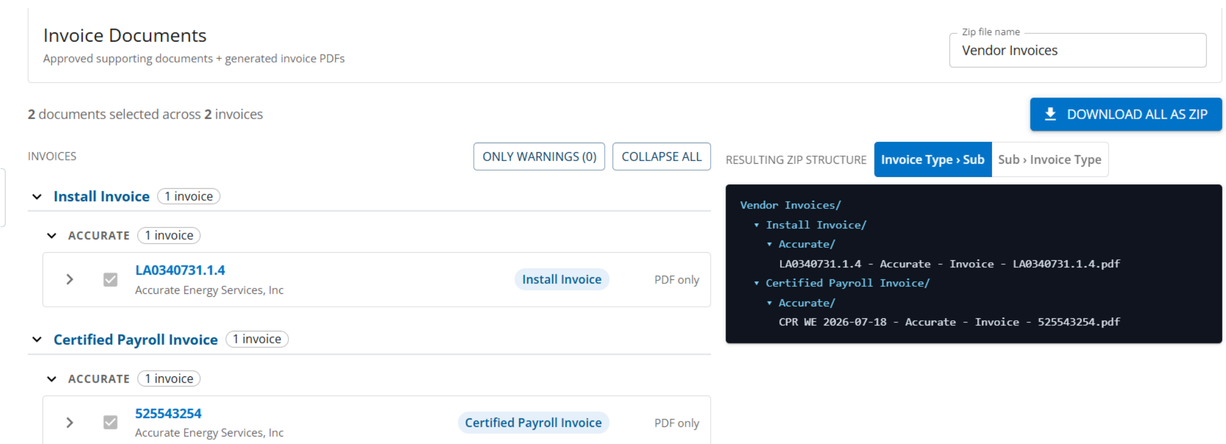
Subcontractor Invoice ID	Subcontractor Invoice Date	Invoice Status	Week Starting Date	Week Ending Date
JULY23TEST4	07/23/2026	ReadyForBilling	07/06/2026	07/10/2026
JULY23TEST4	07/23/2026	Draft	07/13/2026	07/17/2026
july23test4	07/23/2026	ReadyForBilling	07/13/2026	07/17/2026

Note: Audits and Program Documents have not yet been converted to the new subcontractor invoicing process, so those continue to follow the existing process. **Users must create one invoice for projects that were processed**

using the old system and another invoice for projects processed using the new system. Projects from both invoice processing systems cannot be combined on the same Utility Invoice.

5.) Enter the Invoice ID and click on the “Create Batch” button

6.) Use the “Invoice Documents V2” tab to view the invoice documents that have been generated and approved using the new subcontractor invoicing process



Please Note: The following issues were discovered and these enhancements to the Utility Invoice Builder did not pass User Acceptance Testing

Item #1: When creating a batch that included items from the old “Installations” tab and the new “Installations V2” tab – the job from the old “Installations” tab disappears once the batch is created

Item #2: Jobs from the new “Installations V2” tab appear in both the old “Invoice Documents" tab and the new "Invoice Documents V2” tab. Since it was generated using the new system, it should only appear in V2.

Item #3: Discovered during smoke testing in PROD – installations that were marked as Install Approved using the old process, but do not have a corresponding Supporting Document uploaded will appear in the “Installations V2” tab. Once these projects have their documents uploaded in the Supporting Documents Section – they will be properly displayed in the “Installations” tab