SPRINT 101

Release Notes

AUGUST 27, 2026

Deployment & Smoke Testing Scheduled for:	August 27, 2026 | 4AM - 9AM PST

An issue was discovered while testing Sprint 101 items in the Production Environment. Previously, CSRs were able to schedule customer appointments on behalf of the AUD role, and those appointments would appear on the AUD Dashboard Calendar.

It was discovered that when CSRs schedule appointments, they now appear on the ESR calendar, **not the AUD calendar.**

This issue will be resolved in Sprint 102. For the time being, if any CSR users need to schedule any appointments for the AUD role, they should reach out to the CCSR.

Overview

1.) FIXED: ESR Calendar Only Displays Appointments Scheduled by the ESR

2.) ESRs Can Download ViewPoint Calendar Appointments to Add to Outlook Calendars

3.) ESRs Can Access Customer Records Through the Dashboard Map

4.) Assessment Phone Number Auto Populates When Adding Contact Person

5.) Decision Maker’s Email Auto Populates in eSign “Signer Email” Field

6.) AUD and CSR Users Able to Submit Audits That Contain Only “No Change” Line Items

7.) New Work Order Statuses: “Install Complete - Processed” and “Install Complete - Processed - No Invoice”

8.) “Is Ready for Billing” Checkbox Moved to Work Orders | Approval Section

9.) Invoicing Enhancement: New Aging Feature for Audits and Work Orders

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1.) FIXED: ESR Calendar Only Displays Appointments Scheduled by the ESR

An issue was discovered where ViewPoint calendar appointments made by the AUD role, or on behalf of the AUD Role by the CSR or CCSR, were appearing on the ESR's calendar.

This created confusion for users because there was nothing distinguishing these AUD appointments from the ESR appointments.

This issue has been resolved, and now the AUD Role's calendar appointments will only appear on their dashboards and the ESRs will only have visibility into their own calendar appointments.

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It was discovered that when CSRs schedule appointments, they now appear on the ESR calendar, **not the AUD calendar.**

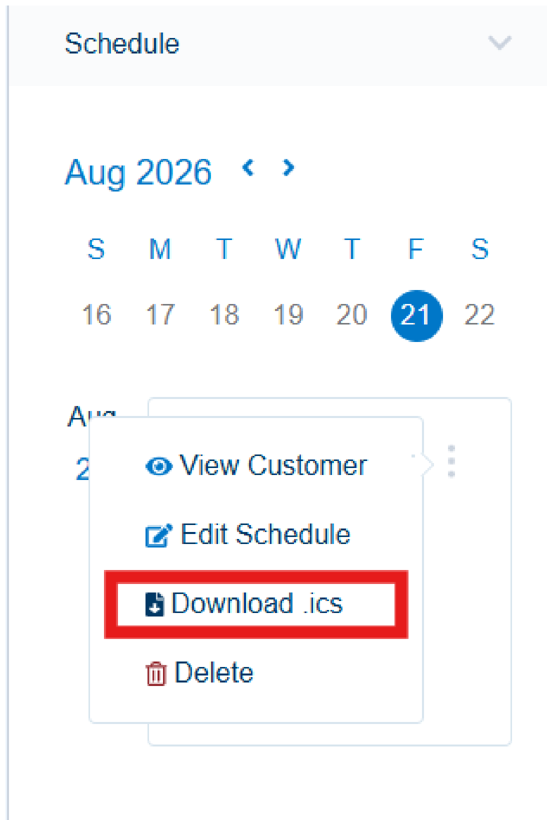
This issue will be resolved in Sprint 102. For the time being, if any CSR users need to schedule any appointments for the AUD role, they should reach out to the CCSR.

2.) ESRs Can Download ViewPoint Calendar Appointments to Add to Outlook Calendars

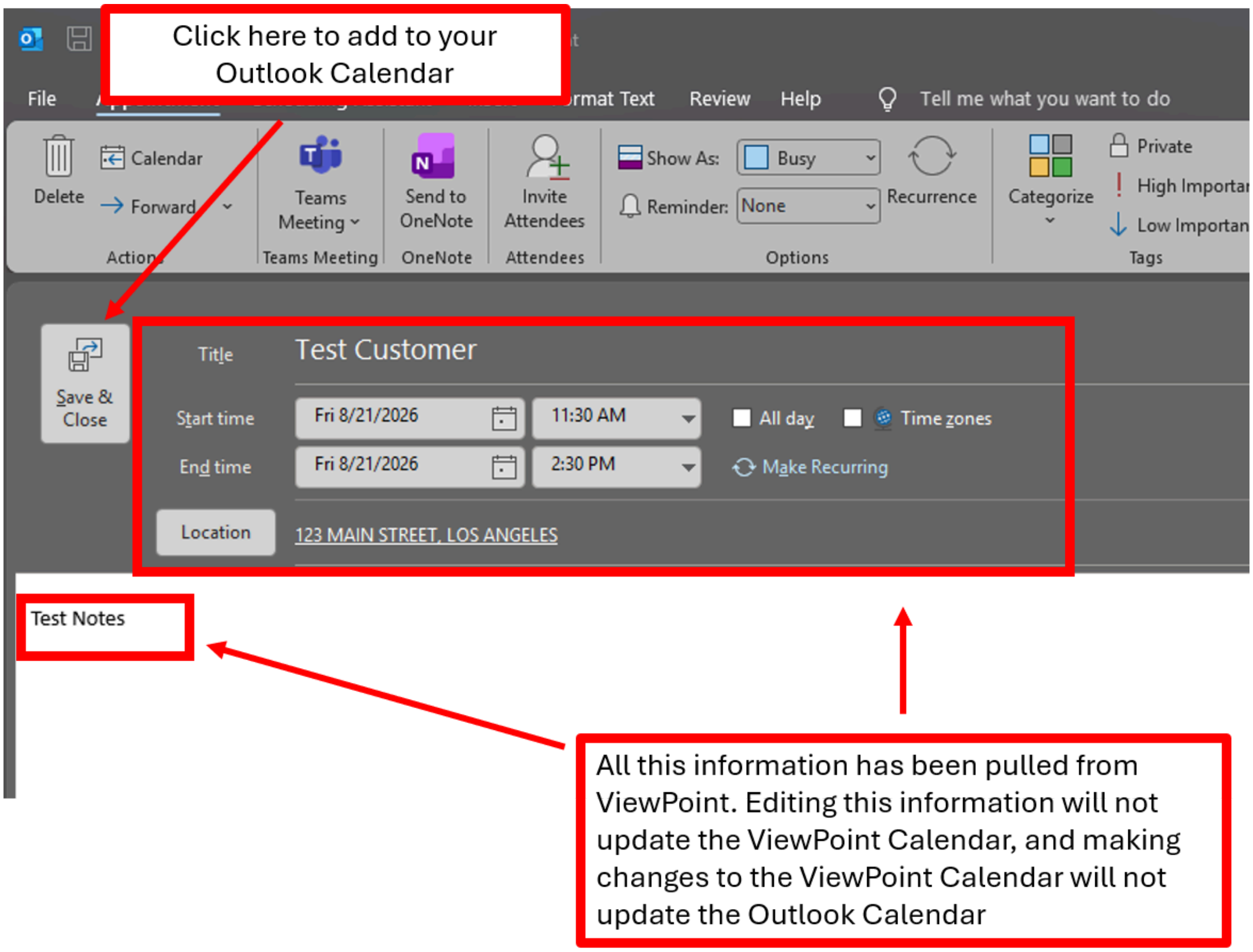
ESRs can now export their scheduled ViewPoint appointments as a calendar file (.ics) and import them directly into their Outlook calendars by following the steps outlined below:

1.) When viewing the ESR Dashboard, navigate to the “Schedule” section to the left of the map

2.) Find the appointment you want to export, expand the ellipsis menu on its card, and select “Download .ics” to download the calendar file.



3.) Open the downloaded file from your device. This will launch Outlook, where you will be prompted to add the appointment.



4.) The appointment will now appear on your Outlook calendar.

What carries over into the Outlook appointment

- **Title:** the customer name as it appears in ViewPoint (note: you may want to update this in Outlook to reflect the customer's DBA name, since ViewPoint may show the legal/registered name).
- **Location:** the site address, pulled in from ViewPoint
- **Notes:** any notes entered on the appointment in ViewPoint carry over into the Outlook appointment body.
- **Start/End time:** the scheduled appointment window.

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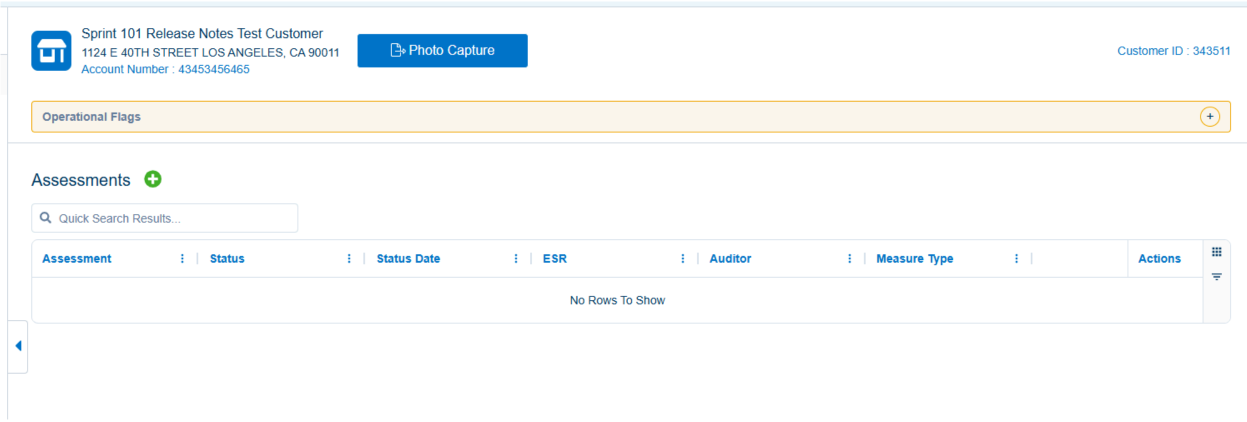
3.) ESRs Can Access Customer Records Through the Dashboard Map

Now, ESRs can access the customer records through their Dashboard Map by selecting a pin, then clicking on the customer's address (underlined and in blue).

Will bring users to the "Assessment Initiation" page where they can create their assessments:



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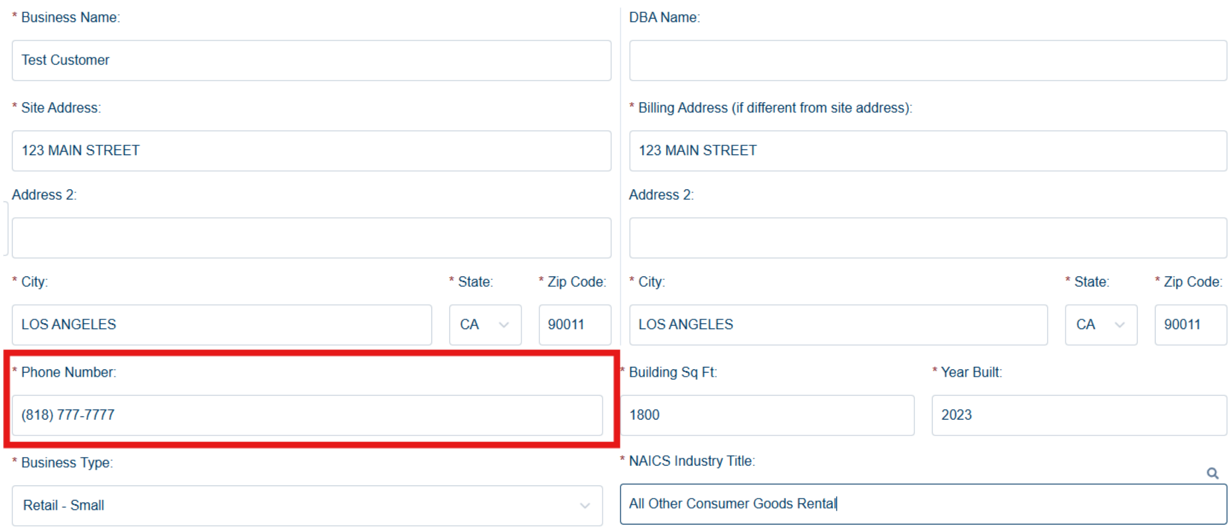
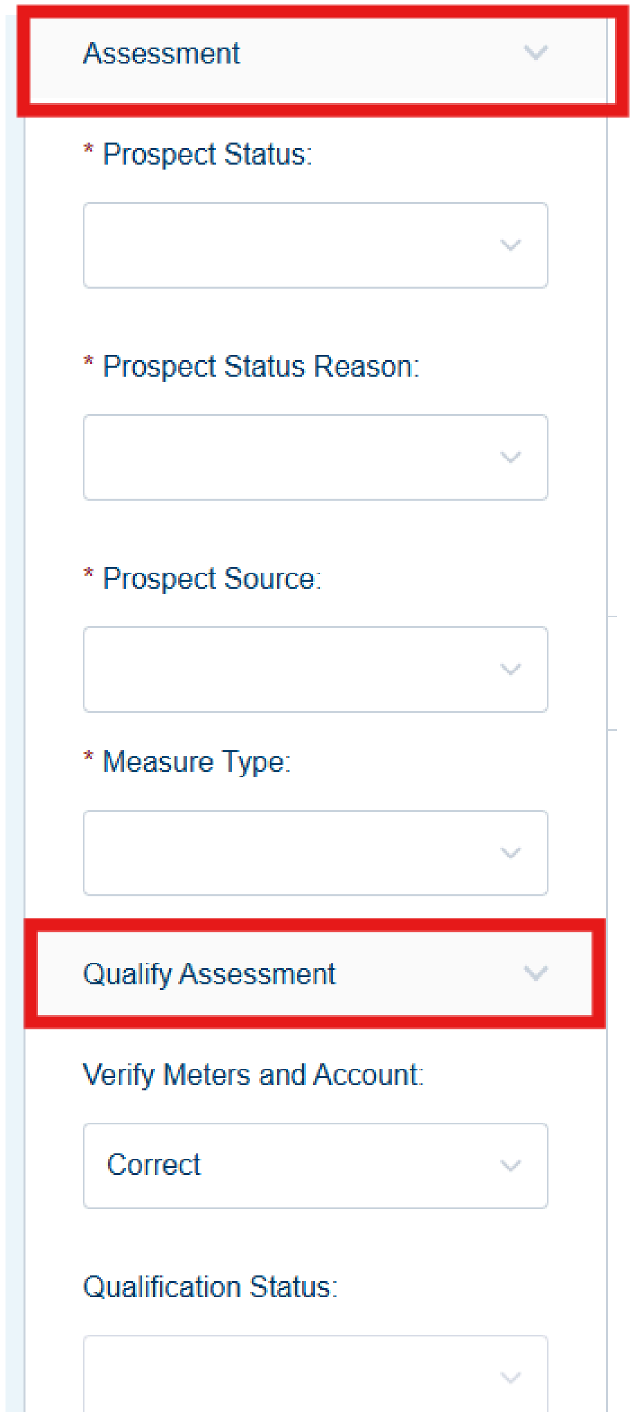
4.) Assessment Phone Number Auto Populates When Adding Contact Person

The phone number entered in the customer site information section of the assessment now automatically populates the “Phone Number” field in the “Add Contact Person” modal if users follow the steps outlined below:

1.) Create a new assessment and fill out the Customer Site section (including the phone number field) at the top of the assessment.



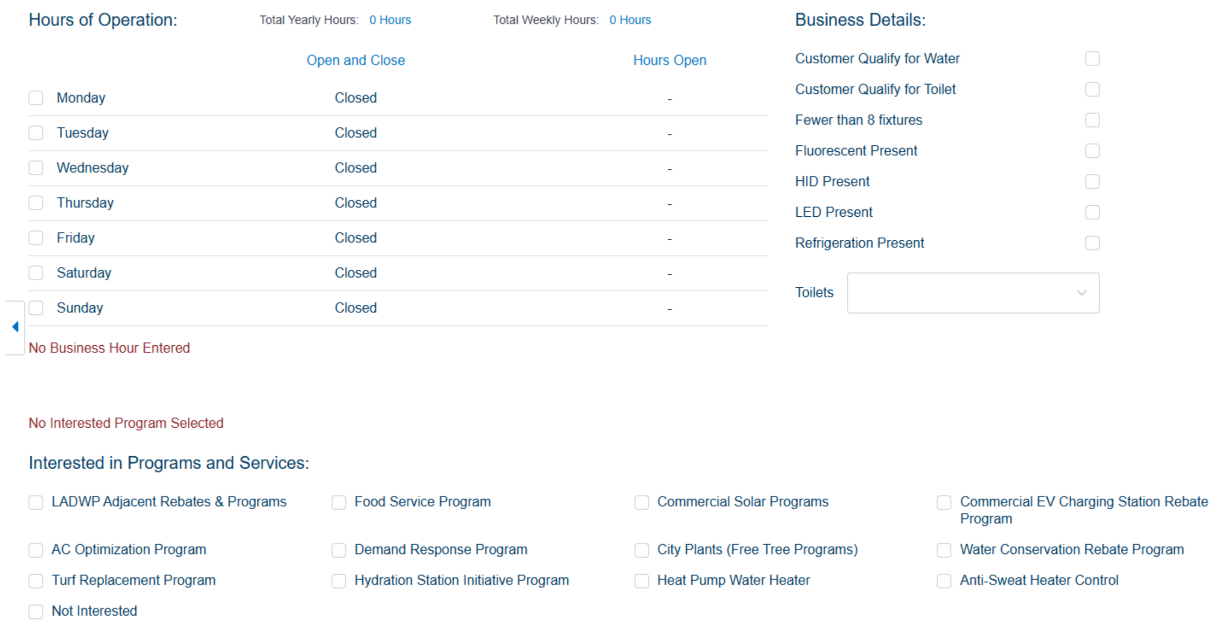
2.) Complete the required left-side panels: Assessment and Qualify Assessment



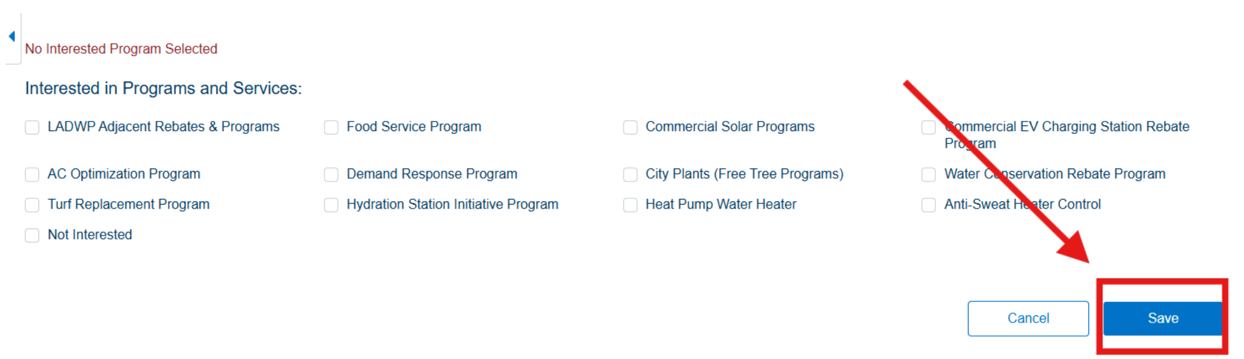
3.) Skip the "Add Contact Person" section and hold off on generating the CAAA for now

4.) Navigate to the bottom of the assessment and fill out the following sections:

Hours of Operation, Business Details, and Interested in Programs and Services.

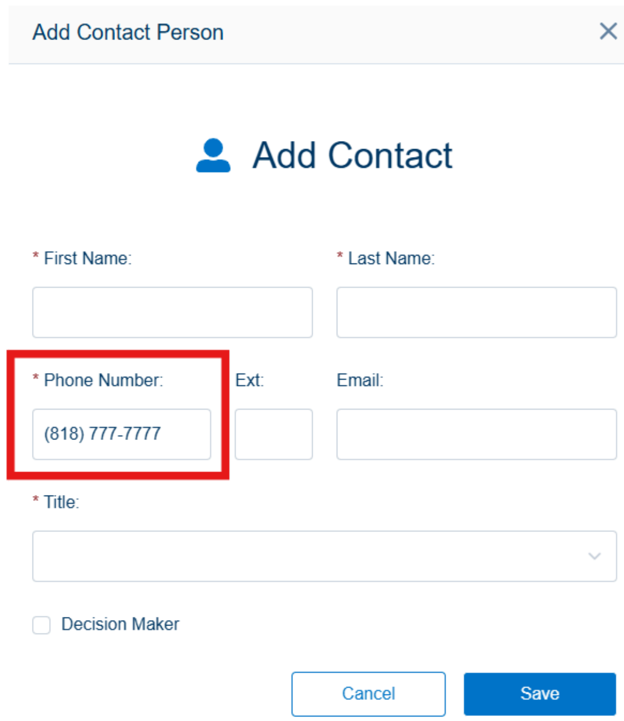


5.) Click on the “Save” button at the bottom of the Assessment Page



6.) Return to the “Contact Person” section and click the green “+” icon to open the Add Contact Person modal.

7.) The “Phone Number” field will be pre-filled with the number entered in the Customer Site section.



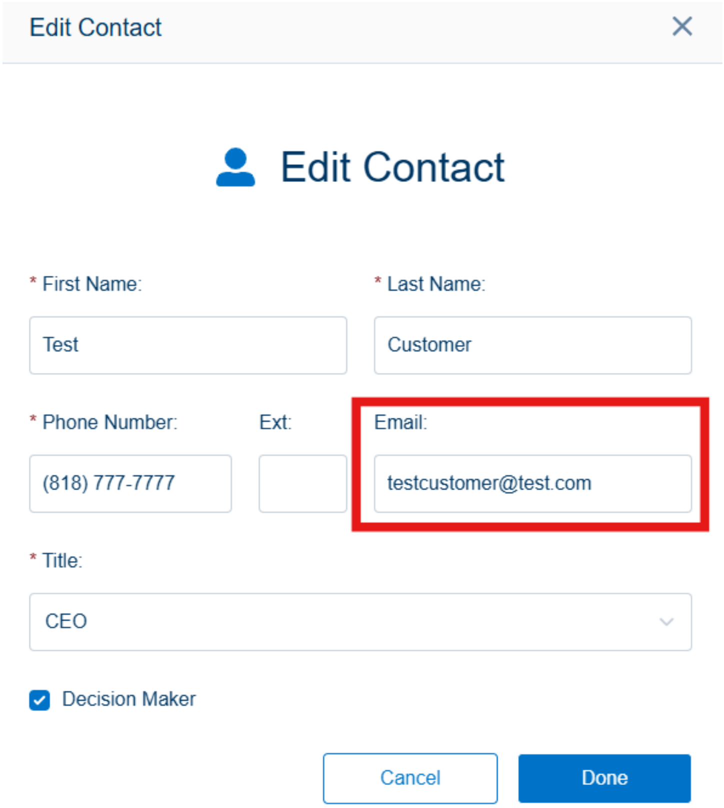
Please Note: The phone number will only auto-populate **after** the assessment has been saved. If the assessment hasn't been saved, then the phone number will not stored in the database, making it unavailable for auto-fill capabilities. Users should save their assessment progress before adding a contact person to take advantage of this feature.

Additionally, updating the auto populated phone number in the "Add Contact Person" modal will not change the phone number in the contact site information section and vice versa.

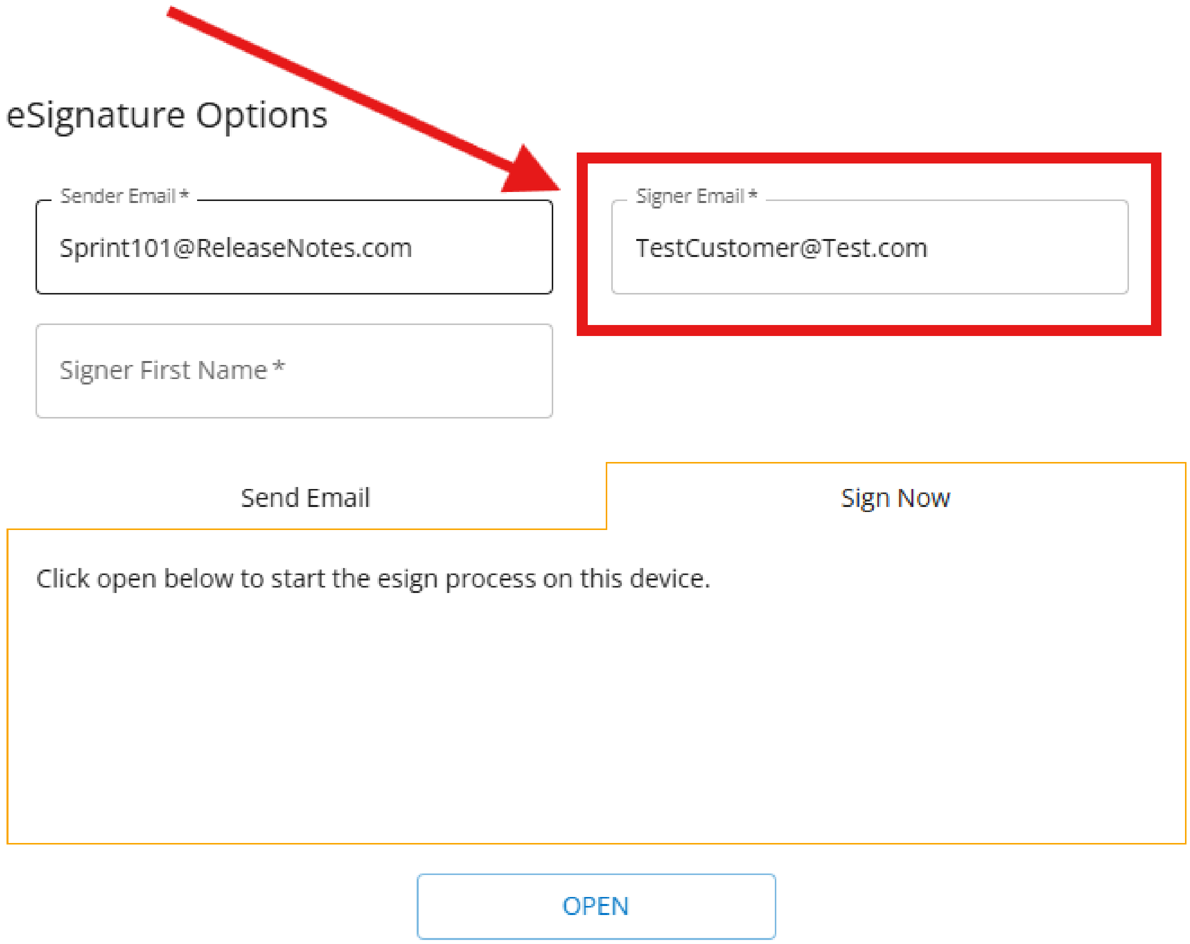
5.) Decision Maker’s Email Auto Populates in eSign “Signer Email” Field

The Decision Maker's email address entered in the Contact Person section of an assessment now automatically carries over to the “Signer Email” field in Closer when eSigning the CAAA

For the designated Decision Maker, the email addressed entered in this field:



Will now automatically populate this field:



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6.) AUD and CSR Users Able to Submit Audits That Contain Only “No Change” Line Items

The “Submit” button is now functional for audits that contain only “No Change” Line Items

Line Item Summary

Quick Search Results...

Floor	Room	Ref	Fixture Hgt	Base Qty	Base Desc	Prop Qty	Proposed	Actions
Floor 1	Hallway	16320	12	10	High Bay with (8) 50 Watt Compact Fluorescent Biax Lamps with 4 Pin Base and Electronic Ballast(s)	0	No Change	
Floor 1	Hallway	16321	12	10	Kitchen Faucet with 2.2 GPM or Greater Aerator Heated by Gas	0	No Change	
				20		0		

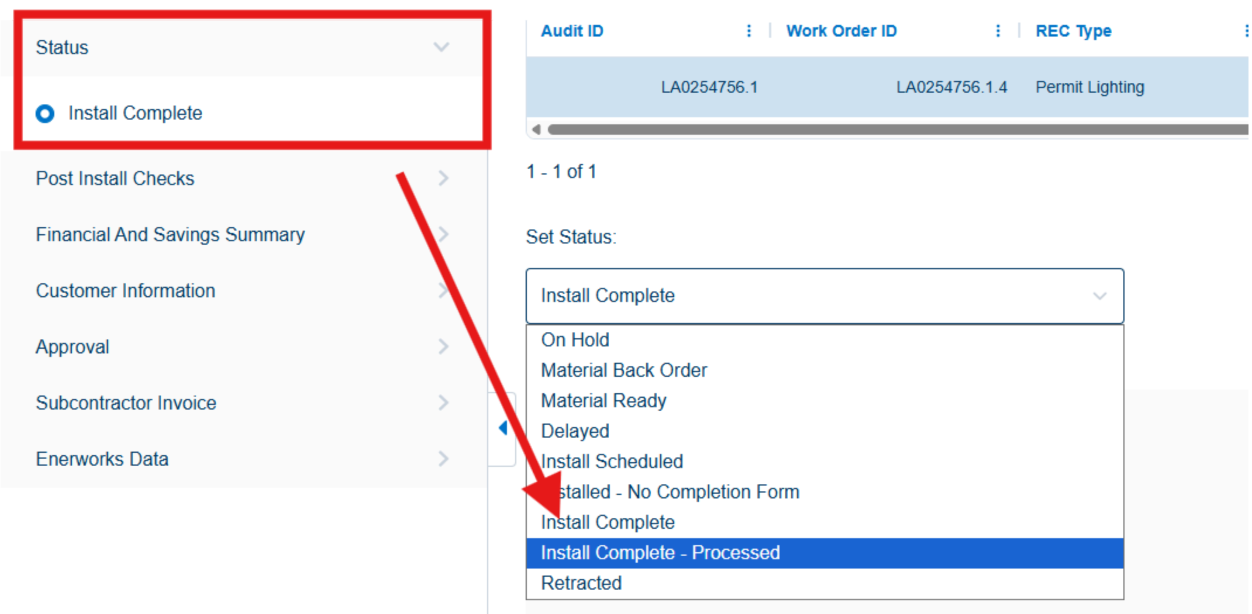
1 - 2 of 2

Close Submit

7.) New Work Order Statuses: “Install Complete - Processed” and “Install Complete - Processed - No Invoice”

Two new work order statuses have been added to help CSRs track which jobs have been reviewed and processed. They also help CCSRs track which of their work orders are ready to have invoices generated.

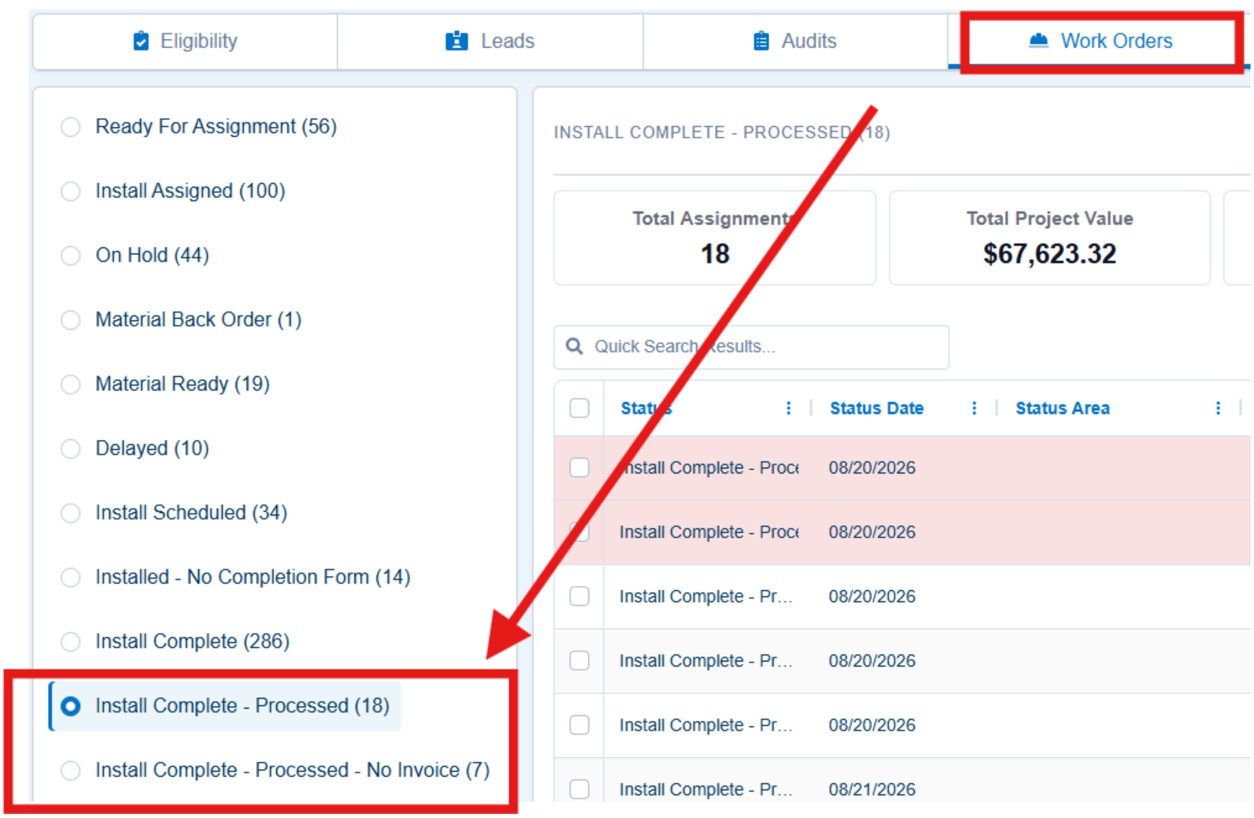
Install Complete - Processed is a status that only a **CSR** can set. This status should be set once the CSR has finished reviewing the work order, any related documents, and making adjustments to installed quantities.



Once a work order has the “Install Complete - Processed” status, a subcontractor will be able to generate their installation invoices within the platform. Previously, “Install Complete” was the status that enabled invoicing – users will not be able to generate invoices when a project is in this status.

Once a work order is set to Install Complete - Processed, it will appear in two queues within the “Work Orders” section of the CSR and CCSR workspace:

- **Install Complete - Processed:** Projects a CSR has finished reviewing and processing
- **Install Complete - Processed - No Invoice:** Projects that have been processed, where the subcontractor has not created an invoice. CCSRs can use this section to track which projects they need to invoice
    - Once an invoice has been created for a job, that work order will drop out of the "No Invoice" queue and will only continue to appear in the “Install Complete - Processed” queue.



8.) “Is Ready for Billing” Checkbox Moved to Work Orders | Approval Section

The “Is Ready for Billing” checkbox used by CSRs to make a work order appear in the Client Invoice Builder has moved into the “Approval” section of the Work Order view.

Additionally, in order to check the “Is Ready for Billing” box, the project must have the “Install Approved” status.

In order to mark a project as ready for billing, navigate to the Work Orders | Approval section and follow the steps outlined below:


Set Status:
Approved
1
Set the "Approved" status
Project Status:
Approved
08/21/2026
2
Set the Approval Date
Notes:
Add a note
You have 1000 of 1,000 characters remaining
Is Ready for Billing
3
Click on the "Is Ready for Billing" checkbox
4
Click on the "Save" button
Close
Save

9.) Invoicing Enhancement: New Aging Feature for Audits and Work Orders

Sprint 101 introduces a new feature that allows UTIL, CSR, and CCSR users to track audits and installations that need to be invoiced within the allotted time windows.

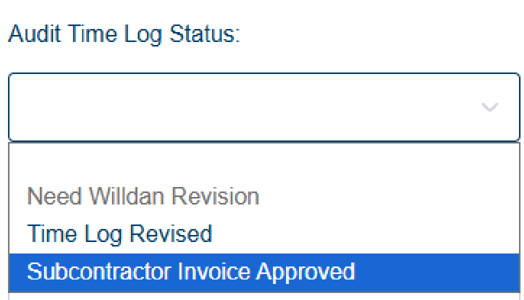
Aging warnings will appear within the workspace, where the customer records will appear with color coded warnings. Aging warnings will disappear once a project has been invoiced.

Audit Aging

Aging for **Audits** begins the on the date the audit was submitted and will as outlined below:

Role	Warning Stage (Record Highlighted Yellow)	Caution Stage (Record Highlighted Orange)	Danger Stage (Record Highlighted in Red)
CCSR	Warning Stage = Days 7–13 Since an Audit was Submitted	Caution Stage = 14 Days Since an Audit was Submitted	Danger Stage = 15+ Days Since an Audit was Submitted, Subcontractor Loses Ability to Edit Audit Time Log
CSR	Warning Stage = 45 Days Since an Audit was Submitted	*N/A*	Danger Stage = 46+ Days Since an Audit was Submitted, If an Invoice is not Submitted Within 6 Months the Audit Becomes Unbillable to the Utility

The Audit Time Log has not been converted to the new subcontractor invoicing process. Aging calculations for an audit end when the Audit Time Log Status is set to “Subcontractor Invoice Approved”



Work Order Aging

Aging for **Work Orders** begins on the date the "Install Complete" status is set. If the "Install Complete" status date changes, the aging warnings will recalculate. For work orders that are retracted or cancelled, aging is calculated based on the date those statuses are set.

Role	Warning	Caution	Danger
CCSR	Warning Stage = Days 7–13 Since a Work Order was Marked Complete	Caution Stage = 14 Days Since a Work Order was Marked Complete	Danger Stage = 15+ Days Since a Work Order was Marked Complete
CSR / UTIL	Warning Stage = 45 Days Since a Work Order was Marked Complete, Retracted, or Cancelled	*N/A*	Danger Stage = 46+ Days Since a Work Order was Marked Complete, Retracted, or Cancelled, If an Invoice is not Submitted Within 6 Months the Work Order Becomes Unbillable to the Utility

Example of how Aging Projects will Appear in the Workspace:

Quick Search Results...

Audit Assignment Status	Audit Status	Status Date	Audit QA Status	Status Area	Assessment ID	Aud	Actions
Accepted	Submitted ⚠	03/24/2026		Input Completed	LA0254562.2		
Scheduled	Submitted ⚠	03/27/2026			LA0212373.3		
Scheduled	Submitted ⚠	03/27/2026			LA0286724.1		
Accepted	Submitted	04/02/2026			LA0362594.1		
Accepted	Submitted ⚠	04/02/2026		Input Completed	LA0235974.1		
Accepted	Submitted ⚠	04/08/2026		Input Completed	LA0282217.1		
Accepted	Submitted ⚠	04/09/2026		Input Completed	LA0236556.1		
Scheduled	Submitted	04/15/2026			LA0330908.1		