

SPRINT 102

Release Notes

SEPTEMBER 24, 2026

Deployment & Smoke Testing
Scheduled for:

SEPT. 24, 2026 | 4AM - 9AM PST

Overview

- 1.) ESR: Site Scheduling Contact can be Designated in ViewPoint to Autopopulate Fields on CAAA
- 2.) CSR, CCSR, and UTIL Workspace Enhancement: Audit Section Now Displays Audit Scheduled Date
- 3.) CSR, ESR, CCSR, AUD: Setting Audit Attempt Status Will Create a Date and Time-Stamped Note
- 4.) CSR + AUD: Enhanced Audit Measure Builder
- 5.) CSR + CCSR: Subcontractors can Invoice Retracted Work Orders
- 6.) Bug Fix: CSR Can Change Prospect Status and Prospect Status Reason from Lead to No Lead - Utility Denied

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1.) ESR: Site Scheduling Contact can be Designated in ViewPoint to Autopopulate Fields on CAAA

The “Add Contact Person” modal allows users to designate a Decision Maker and a Site Contact. Each role can be assigned to the same person or to two different people, and the selections now flow directly into the generated CAAA.

- Users will be reminded that a Decision Maker and a Site Contact need to be designated

Contact Person

Decision Maker	Site Contact	First Name	Last Name
No Rows To Show			

No decision maker has been selected

No site contact has been selected

- A new “Site Contact” column has been added to the “Contact Person” table

Contact Person

 Quick Search Results...

Decision Maker	Site Contact	First Name	Last Name
Yes	No	Decision	Maker
No	Yes	Site	Contact

- New “Site Contact” checkbox: Checking the box will make the contact details appear within the “Authorized Site Contact for Scheduling” section of the CAAA

Add Contact Person



Add Contact

* First Name:

* Last Name:

Site

Contact

* Phone Number:

Ext:

Email:

(818) 999-9999

sitecontact@test.com

* Title:

Business Manager

☐ Decision Maker

☐ Site Contact

Cancel

Save

Authorized Signer

Signature:

Printed Name: Decision Maker

Title: Business Owner

Date: 09/21/2026

Authorized Site Contact for Scheduling

Printed Name: Site Contact

Title: Business Manager

Phone: 818-999-9999

Email: sitecontact@test.com

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2.) CSR, CCSR, and UTIL Workspace Enhancement: Audit Section Now Displays Audit Scheduled Date

All of the statuses within the Audits section of the Workspace have a new column called “Audit Scheduled Date” that displays the date an auditing appointment has been scheduled at a customer site.

The screenshot shows the 'Audits' section of a workspace. On the left, there is a sidebar with a list of audit statuses: Assigned (54), Accepted (109), Rejected (15), Scheduled (55) (selected), In-Progress (48), Submitted (172), Pending Update (14), and Pending Review (42). The main area displays a summary for 'SCHEDULED (55)' with three metrics: Total Assignments (55), Total Project Value (\$0.00), and Potential kW (0). Below this is a search bar labeled 'Quick Search Results...'. A table lists audit assignments with columns for 'Audit Assignment Status', 'Audit Status', and 'Audit Scheduled Date'. The 'Audit Scheduled Date' column is highlighted with a red border, showing dates: 08/20/2026, 07/20/2026, and 09/26/2026.

Audit Assignment Status	Audit Status	Audit Scheduled Date
☐	Scheduled	08/20/2026
☐	Scheduled	07/20/2026
☐	Scheduled	09/26/2026

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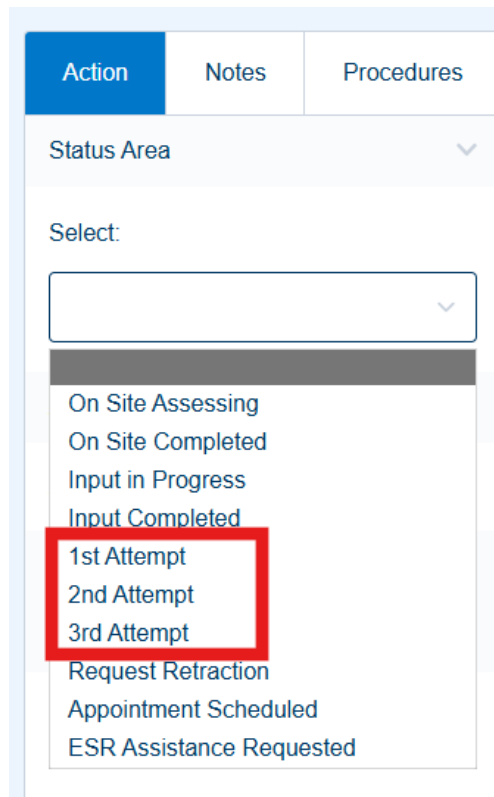
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3.) CSR, ESR, CCSR, AUD: Setting Audit Attempts Will Create a Date and Time-Stamped Note

When an auditor sets the Audit Status Area to either “1st Attempt,” “2nd Attempt,” or “3rd Attempt,” the platform will automatically generate an Audit Note that records the date and time that the auditor attempted to visit the customer site.

When an auditor sets one these Status Areas:



Action	Notes	Procedures
Status Area ▼		
Select:		
On Site Assessing		
On Site Completed		
Input in Progress		
Input Completed		
1st Attempt		
2nd Attempt		
3rd Attempt		
Request Retraction		
Appointment Scheduled		
ESR Assistance Requested		

An audit note with the date and time will automatically be generated:

Action	Notes	Procedures
Customer		>
Facility		>
Assessment		>
Audit (1)		∨
☐ Include In Scope of Work		
Tera Tolentino 09/21/2026 ⋮ 1st Attempt – 9/21 at 3:00 PM		
Work Order		>

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4.) CSR + AUD: Enhanced Audit Measure Builder

The enhanced audit measure builder makes it easier for users to enter line items while performing an audit.

Once a floor and room have been created, clicking on the “+” next to “Add Line Items” will bring users to the new audit measure builder page:

The screenshot displays the 'Audit Measure Builder' interface. At the top, it shows the company name 'ARMAN JEWELRY INC' and address '13253 MOORPARK ST SHERMAN OAKS, CA 91423'. The 'Account Number' is '1474390000' and the status is 'Active'. The 'Audit ID' is 'LA0212229.1'. Below this is an 'Operational Flags' section with a '+' icon. The main form is divided into two sections: 'Location' and 'Base Condition'. The 'Location' section includes fields for 'Floor' (Basement), 'Room' (Office), 'Ceiling Height' (12), and 'Weekly Hours' (144). It also has radio buttons for 'Air Conditioned' (selected), 'Not Air Conditioned', and 'Outdoor'. The 'Base Condition' section includes a 'Measure Type' dropdown, a 'Technology Type' dropdown, and a 'Filter' button. Below these is a message '1 already used in this audit' and a 'Selected Measure' dropdown. At the bottom, there are fields for 'Fixture Height' (12) and 'QTY' (0).

Location			
Floor	* Room	* Ceiling Height	* Weekly Hours
Basement	Office	12	144
☒ Air Conditioned ☐ Not Air Conditioned ☐ Outdoor			

Base Condition	
* Measure Type	* Technology Type
Filter Clear	
Choose a Measure Type first	
1 already used in this audit	
Selected Measure	
* Fixture Height	* QTY
12	0

Users will have the option to select a measure that they previously added:

Base Condition

* Measure Type * Technology Type

Choose a Measure Type first

1 already used in this audit

Selected Measure

4 ft Recessed Lensed Troffer with (1) 4 ft 34 Watt T12 Fluorescent BiPin Lamp with 1 Standard Magnetic Ballast

When adding a new measure that was not previously used, users should begin by making selections from the “Measure Type” and “Technology Type” drop down lists:

Base Condition

* Measure Type * Technology Type

Water
 Lighting
 Refrigeration
 Non-ECM
 Heat Pump Water Heater
 Anti-Sweat Heater Control

Choose a Measure Type first

If they need to narrow down the selections further, users should click on the “Filter” button:

Base Condition

* Measure Type * Technology Type

Showing 4421 results

Selected Measure

The "Filter Measures" modal lets users narrow down the measure list by picking values from dropdown menus, one attribute at a time. Each selection reveals a

new dropdown for the next attribute, so the list gets more specific with each choice.

Filter Measures

Narrow the measure list by attribute

Fixture Type

Any

Clear All Filters

4421 measures

4 ft Recessed Lensed Troffer with (1) 4 ft 34 Watt T12 Fluorescent BiPin Lamp with 1 Energy Saving Magnetic Ballast

4 ft Recessed Lensed Troffer with (1) 4 ft 34 Watt T12 Fluorescent BiPin Lamp with 1 Standard Magnetic Ballast

4 ft Recessed Lensed Troffer with (1) 4 ft 40 Watt T12 Fluorescent BiPin Lamp with 1 Energy Saving Magnetic Ballast

4 ft Recessed Lensed Troffer with (1) 4 ft 40 Watt T12 Fluorescent BiPin Lamp with 1 Standard Magnetic Ballast

Cancel

Apply Filters

Filter Measures

Narrow the measure list by attribute

Fixture Type

Recessed Parabolic Trof

Ballast Count

4

Ballast Power

Standard

Ballast Type

Energy Saving Magnetic

Fixture Code

Any

Clear All Filters

2 measures

4 ft Recessed Parabolic Troffer with (8) 4 ft 34 Watt T12 Fluorescent BiPin Lamps with 4 Energy Saving Magnetic Ballasts

8 ft Recessed Parabolic Troffer with (8) 4 ft 34 Watt T12 Fluorescent BiPin Lamps with 4 Energy Saving Magnetic Ballasts

Cancel

Apply Filters

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5.) CSR + CCSR: Subcontractors can Invoice Retracted Work Orders

Once a CSR has marked an installation as “Retracted,” the CCSR will be able to create an Additional Work Invoice.

Work Orders

Quick Search Results...

Audit ID	Work Order ID	REC Type	Contractor Assigned	Status	Campaign
LA0298192.1	LA0298192.1.3	Retrofit Lighting	TestWilldan	Retracted	

1 - 1 of 1

[Additional Work Invoices](#)

Additional Work Invoices

Install Complete Date Jul 6, 2026

Facility > Business Name

Facility > Address

Project Number LA0298192.1.3

0 invoices

☐ Include completed ☐ Only completed Status

No invoices yet

Create the first one.

[+ CREATE NEW INVOICE](#)

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6.) Bug Fix: CSR Can Change Prospect Status and Prospect Status Reason from Lead to No Lead - Utility Denied

During an assessment, an ESR might mark a customer as a Qualified Lead only for the Utility to deny the customer's eligibility.

Once this happens, the CSR must mark the customer as "No Lead" with the Prospect Status reason of "Utility Denied." Previously, the Prospect Status Reason would not save, but this bug has been fixed with the deployment of Sprint 102.

Users will be able to change a customer from "Lead" to "No Lead" and set the appropriate Prospect Status Reason.