

# SPRINT 91

## Release Notes

NOVEMBER 6, 2025

Deployment & Smoke Testing Scheduled for:

November 6, 2025 | 4AM - 9AM PST

## Overview

### 1.) Workspace Display Enhancements

- New “Status Date” Column Added to Audit Assigned, Accepted, Rejected, and Scheduled Status Filters
- New “Eligibility Status” Column Added to All Status Filters in the Lead Section
- New “Assessment ID” Column Added to Eligibility Section | Under Utility Review and Need CSR Review Status Filters
- Floating Workspace Navigation Arrow

### 2.) Audit Submission Separated from Subcontractor Audit Invoice Submission

### 3.) Updated Template for ViewPoint Generated Subcontractor Audit Invoices

### 4.) New Client Invoicing Features

### 5.) CSR Role Can Edit Notes

### 6.) Ability to Flag Users as an Account Manager

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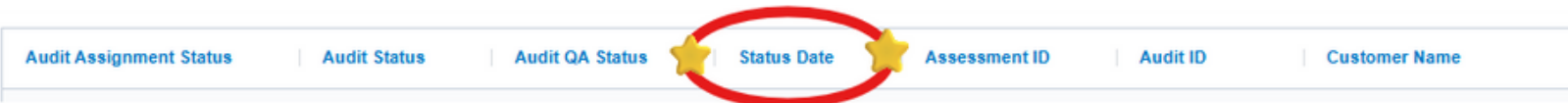
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### 1.) Workspace Display Enhancements

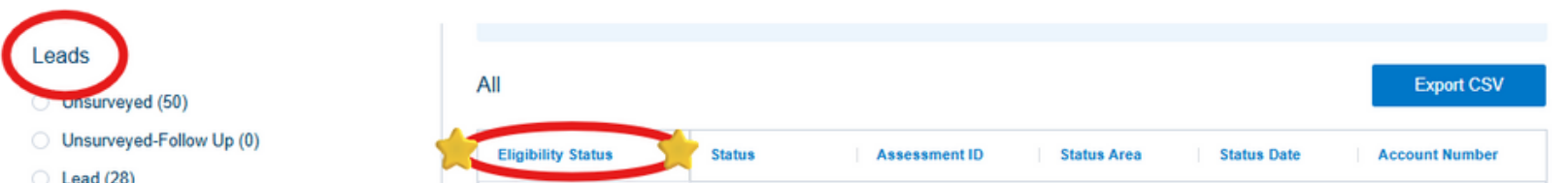
New Workspace Display Features:

- New “Status Date” Column Added to Audit Assigned, Accepted, Rejected, and Scheduled Status Filters



Audit Assignment Status	Audit Status	Audit QA Status	Status Date	Assessment ID	Audit ID	Customer Name
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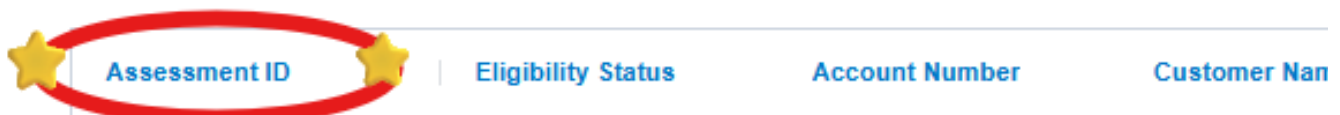
- New “Eligibility Status” Column Added to All Status Filters in the Lead Section



Leads	All	Export CSV				
<input type="radio"/> Unsurveyed (50)	Eligibility Status	Status	Assessment ID	Status Area	Status Date	Account Number
<input type="radio"/> Unsurveyed-Follow Up (0)						
<input type="radio"/> Lead (28)						

- New “Assessment ID” Column Added to Eligibility Section | Under Utility Review and Need CSR Review Status Filters

Eligibility - Under Utility Review



Assessment ID	Eligibility Status	Account Number	Customer Name
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## Eligibility - Need CSR Review

Assessment ID	Eligibility Status	Account Number	Cu
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- Floating Workspace Navigation Arrow

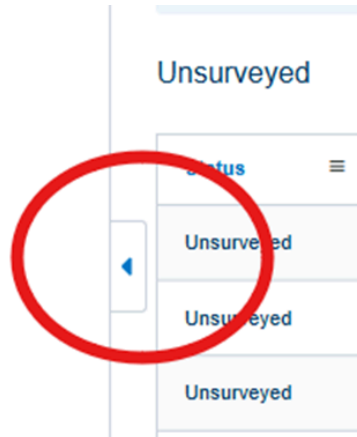
Leads

Unsurveyed (50)

This Arrow Now  
Floats as Users  
Scroll Up and Down  
in the Workspace

Not Qualified (26)

Assigned For Audit (0)



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## 2.) Audit Submission Separated from Subcontractor Audit Invoice Submission

### AUDIT SUBMISSION PROCESS

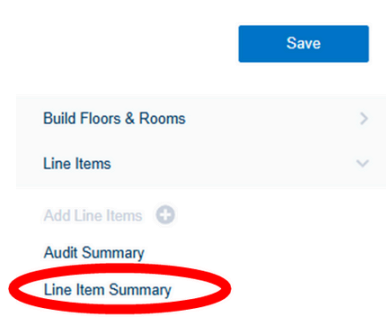
1.) After entering Line Items, Auditors will log their Audit Time

The screenshot displays the 'Add Time Log' dialog box, which is used for logging audit time. The dialog is titled 'Create Time Log' and contains the following fields:

- Name:** Text input field.
- Classification:** Dropdown menu.
- Audit Date:** Calendar icon, value: 11/05/2025.
- Rate Type:** Dropdown menu.
- Shift:** Dropdown menu, value: First Shift (Day Shift) - Straight Time.
- Hours Worked:** Dropdown menu, value: 0.
- Hours Worked Billed To:** Dropdown menu, value: Client.
- Additional Hours Worked:** Text input field.
- Additional Hours Worked Billed To:** Dropdown menu.
- Note:** Text area.
- Utility Note:** Text input field.

At the bottom of the dialog are 'Cancel' and 'Save' buttons. The background shows a blurred view of the main application interface with various tabs and data tables.

2.) Expand the Line Item Panel and click on Line Item Summary



3.) Click on Submit at the bottom of the Line Item Summary

A screenshot of the 'Line Item Summary' page in a software application. The page has a top navigation bar with tabs for 'Account', 'Assessments', 'Audit', 'Work Order', 'QAQC', 'Warranty', and 'Customer Calls'. Below this are three summary cards: 'Financial Summary', 'kWh Summary', and 'kW Summary'. The main content area is a table with the following columns: Floor, Room, Ref, Fixture Hgt, Base Qty, Base Desc, Prop Qty, Proposed, and Color Temp. The table contains four rows of data. A callout box with a blue border and white text says 'Auditors will use this Submit Button to submit their audits'. At the bottom right of the table, there is a blue 'Submit' button circled in red.

Floor	Room	Ref	Fixture Hgt	Base Qty	Base Desc	Prop Qty	Proposed	Color Temp
Exterior	Front (RIC)	116	8	1	Recessed Can with (1) 32 Watt Fluorescent Triple Tube Lamp and Electronic Ballast(s)			
Exterior	West Exterior Wall	3891	12	3	Wall Pack with (1)175 Watt Pulse Halide Mogul Base Lamp with E			
Exterior	West Exterior Wall	3892	30	5	Wall Pack with (1)1400 Watt Pulse Halide Mogul Base Lamp with E			
Exterior	South Exterior Wall	3893	12	4	Wall Pack with (1)175 Watt Pulse Start Metal Halide Mogul Base Lamp with Electronic Ballast	4	Wall Pack with 30W LED Walpack	4000K

## SUBCONTRACTOR AUDIT INVOICE PROCESS

- After the audit has been submitted and an invoice has been generated and uploaded, set the Audit Time Log Status to Subcontractor Invoice Approved and click on Submit.

Audit Time ▼

Audit Time Log Status:

Subcontractor Invoice Approved ▼

Subcontractor Invoice ID:

Test Invoice ID

\* Subcontractor Invoice Date:

11/05/2025 📅

Subcontractor Invoice Approved By:

Subcontractor Invoice Approved Date:

**Submit**

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### 3.) Updated Template for ViewPoint Generated Subcontractor Audit Invoices

- EAA renamed to NECM
- Non-ECM Subtotal renamed to Non-ECM Total

New View:

NON - ECM BILLING SUMMARY						
Line Item	Item No.	Category	Item No. & Measure Description	Quantity	Rate	Amount
NECM1	41	Audit Fee	341 - a -- Energy Assessment - Audit time per hour - Journeyman	2.5	\$0.00	\$0.00
Non-ECM Total						\$0.00

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### 4.) New Client Invoicing Features

- PAD role users now have the ability to remove records from an invoicing batch
- A Program Documents Tab that displays Subcontractor Certified Payroll, Payroll Proof of Submission, and Job Coordinator Invoices has been added to the Utility Invoice Builder
  - Note: Program Documents will only appear in this section if they have been approved by a CSR

The screenshot shows the 'Invoice Billing' interface. At the top left, there is a menu icon and the text 'Invoice Billing'. At the top right, it says 'Last Login November 5, 2025 1:58 PM'. Below this, there are filters for 'Filter by Date Range' (with a 'Select Range' dropdown) and 'Select Existing Batch ID' (with a search input). There is also an 'Invoice ID' field and an 'Invoice Date' field set to '11/05/2025' with a calendar icon, and a 'Create Batch' button. Below the filters, there are three tabs: 'Installations', 'Audits', and 'Program Documents'. The 'Program Documents' tab is highlighted with a red circle and yellow stars. Below the tabs is a table with columns: 'Approval Status', 'Document Type', 'Subcontractor Name', 'Created At', 'Description', 'Period', 'Project ID', 'Sub Invoice ID', and 'Total Sub Cost'. The table contains two rows of data.

Approval Status	Document Type	Subcontractor Name	Created At	Description	Period	Project ID	Sub Invoice ID	Total Sub Cost
Approved	Jobs Coordinator Invoice		11/05/2025	jb 3		114065.NECM.014		\$0.00
Approved	Jobs Coordinator Invoice		11/05/2025	jb a		114065.NECM.014		\$6,351.60

- Utility Users will be able to view Invoice Documents for invoices that have a populated “Billed Date” field
  - Please note, once the “Billed Date” field is populated, the invoice will be locked and un-editable.

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### 5.) CSR Role Can Edit Notes

Customer Record | Notes Tab: CSRs now have the ability to edit and delete Customer, Facility, Assessment, Audit, and Work Order Notes by clicking on the vertical ellipsis.

The screenshot shows a software interface with three tabs: 'Action', 'Notes', and 'Procedures'. The 'Notes' tab is active. Below the tabs, there are three categories: 'Customer (1)', 'Facility (6)', and 'Assessment (2)'. An 'Add Note' button with a green plus sign is visible. A note titled 'Tera Tolentino 11/05/2025' is highlighted with a red circle. A vertical ellipsis menu is open for this note, showing 'Edit' and 'Delete' options. A yellow star is placed next to the 'Edit' option. Below the highlighted note, another note is visible with the text 'CSR users now have the ability to edit and delete notes by clicking on the vertical ellipsis!'.

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### 6.) Ability to Flag Users as an Account Manager

PAD role users are now able to flag Organization Users as Account Managers.

The screenshot shows the user management interface for Willdan. The top right corner indicates the user is logged in as Tera Tolentino, a Program Administrator (PAD). The organization details are Willdan, located at 800 W 6th St, Los Angeles, CA, 90017, with Company Code 1 and Company Type Willdan. The interface has three tabs: Organization, Certifications, and Users. The Users tab is active, showing a list of users with a minus sign icon. Below the list is the 'User Information' form. The form includes fields for First Name (Tera), Last Name (Tolentino), and Phone Number ((718) 989-8989). There is also a 'Manager Name' dropdown menu. At the bottom of the form, there are three checkboxes: 'Is Manager?' (unchecked), 'Is Finance?' (checked), and 'Is Account Manager?' (unchecked). The 'Is Account Manager?' checkbox is highlighted with a red circle and two yellow stars, indicating the new feature. 'Cancel' and 'Save' buttons are located at the bottom right of the form.