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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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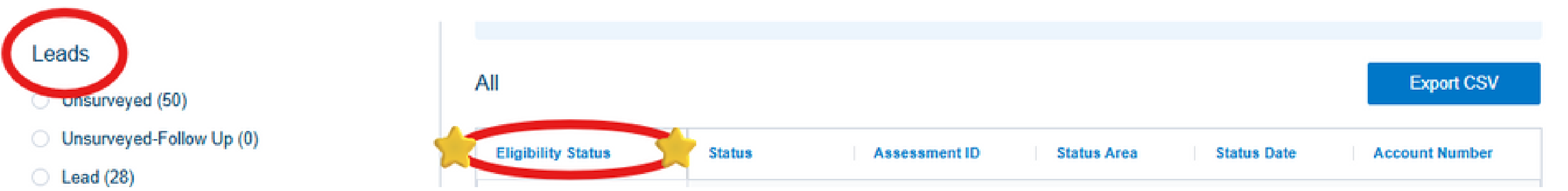

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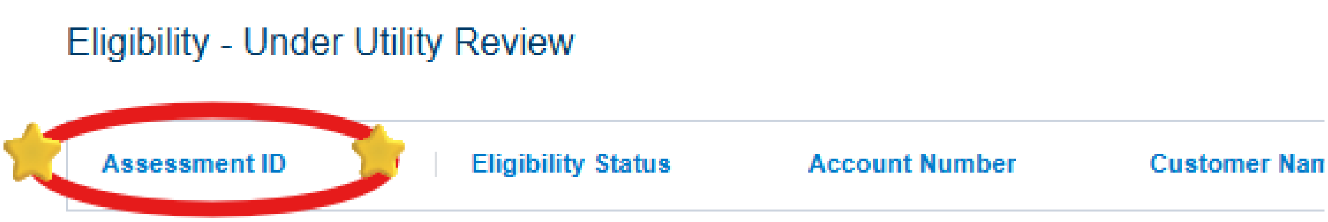

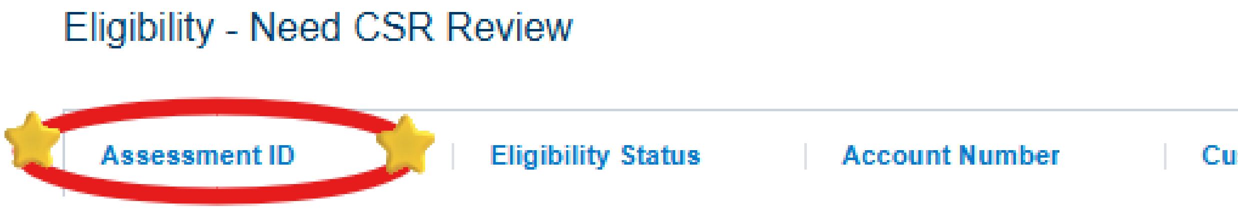

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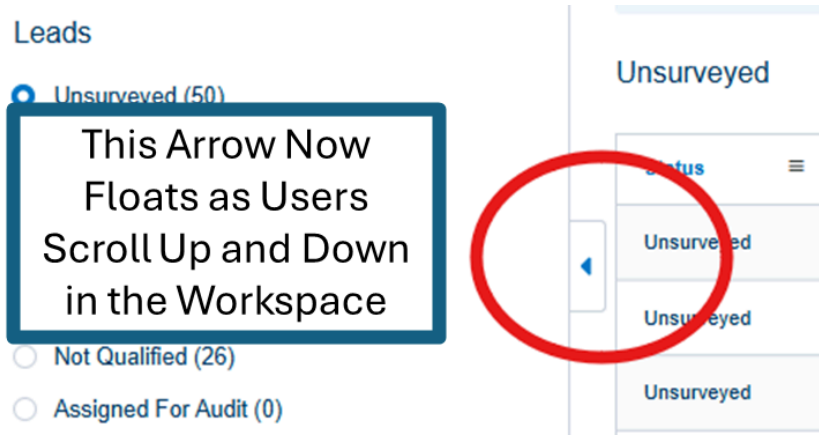

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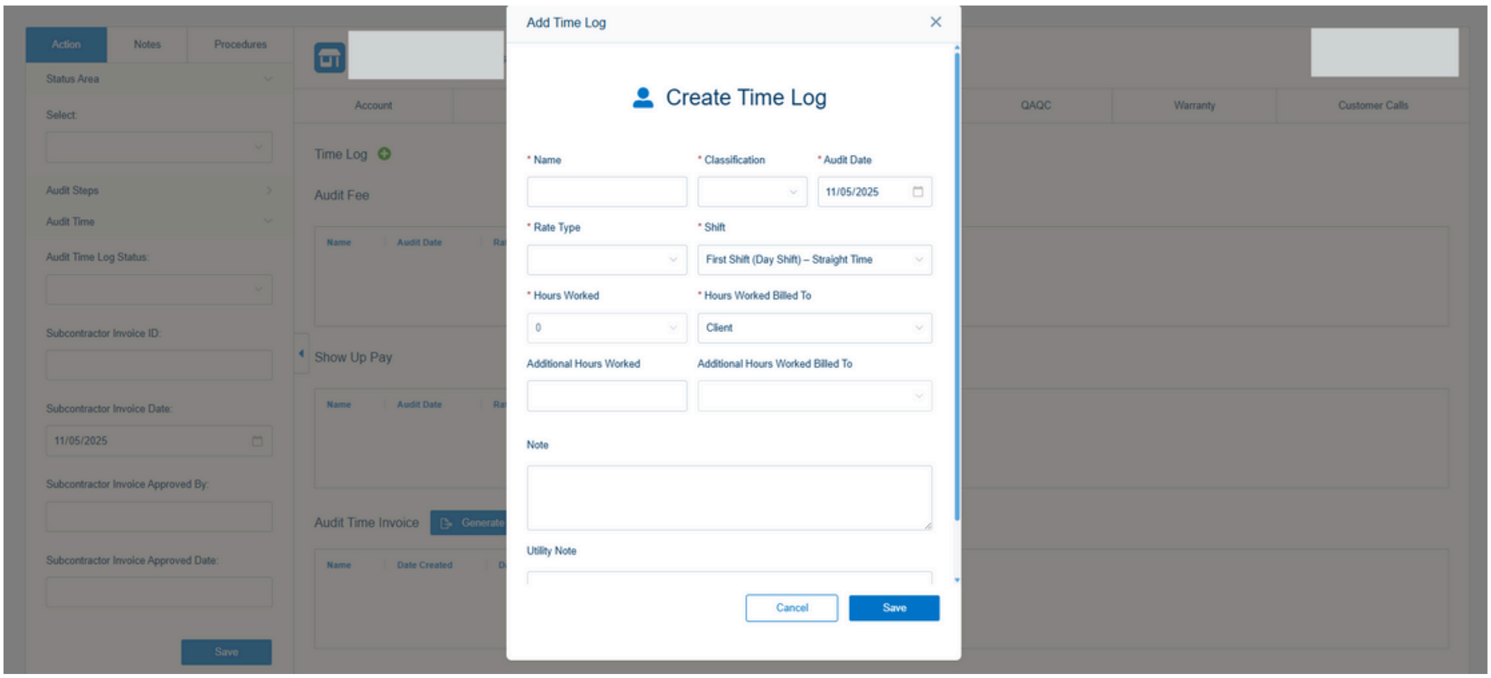
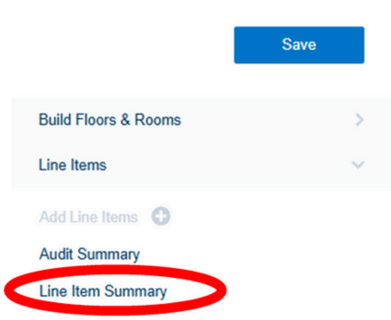
2.) Audit Submission Separated from Subcontractor Audit Invoice Submission

<u>AUDIT SUBMISSION PROCESS</u>

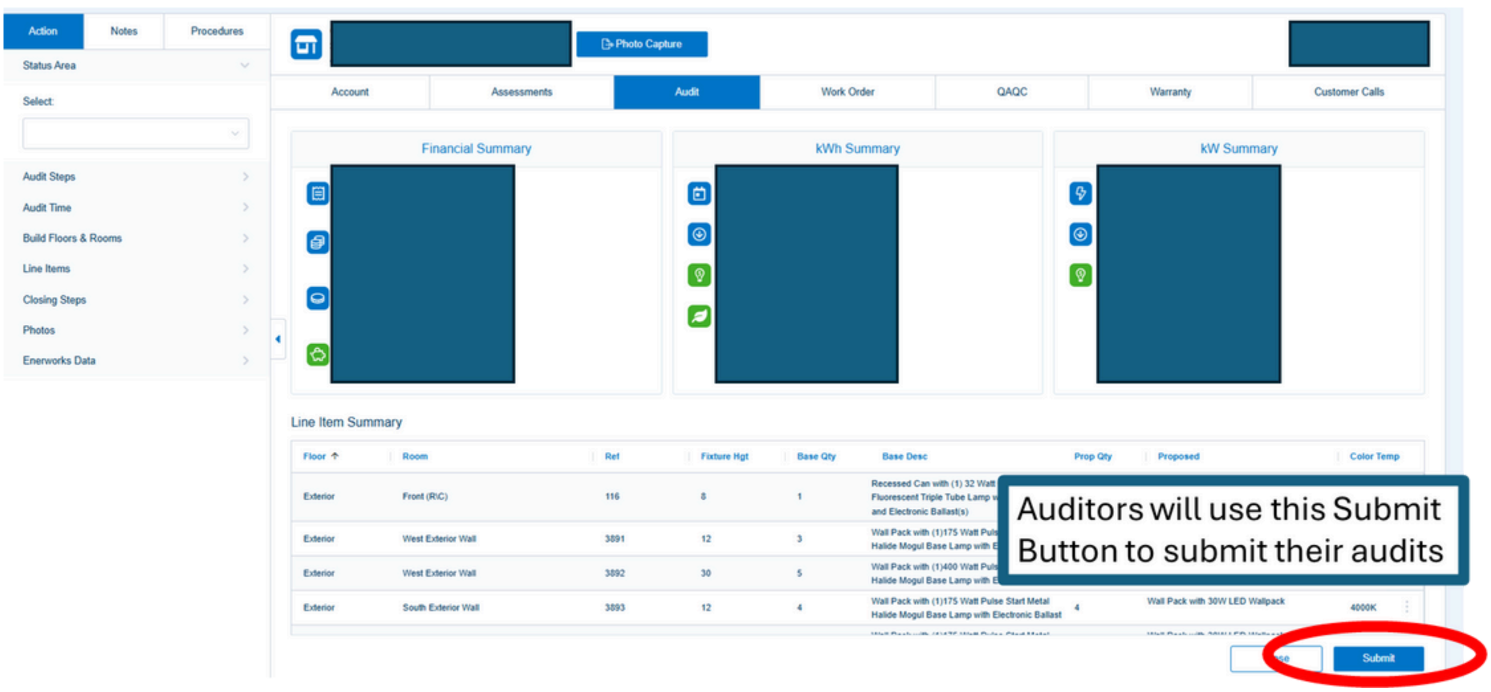
1.) After entering Line Items, Auditors will log their Audit Time



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

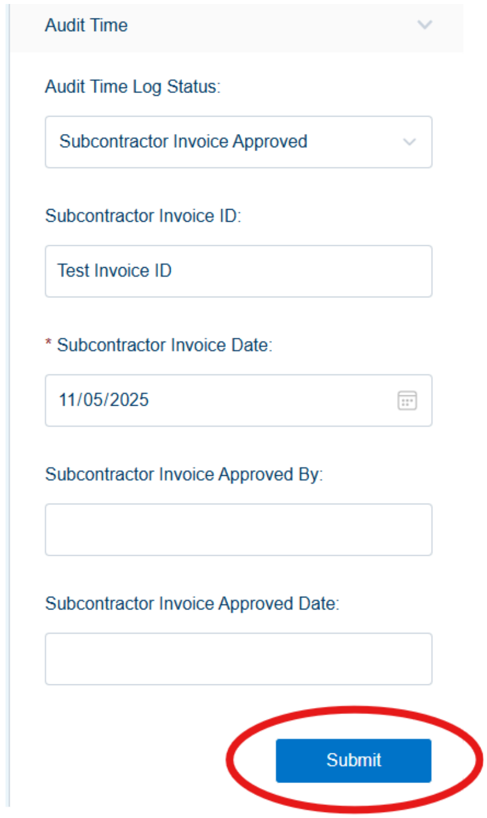


3.) Click on Submit at the bottom of the Line Item Summary



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.



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	341	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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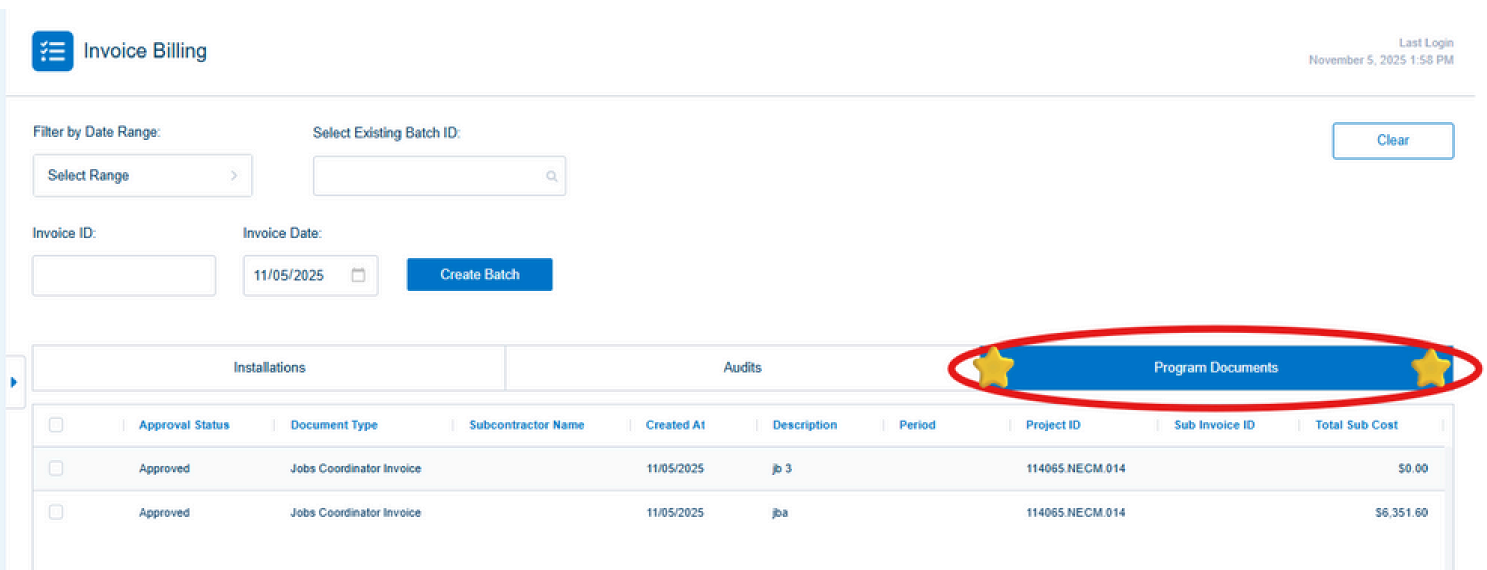
4.) New Client Invoicing Features

- 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



- 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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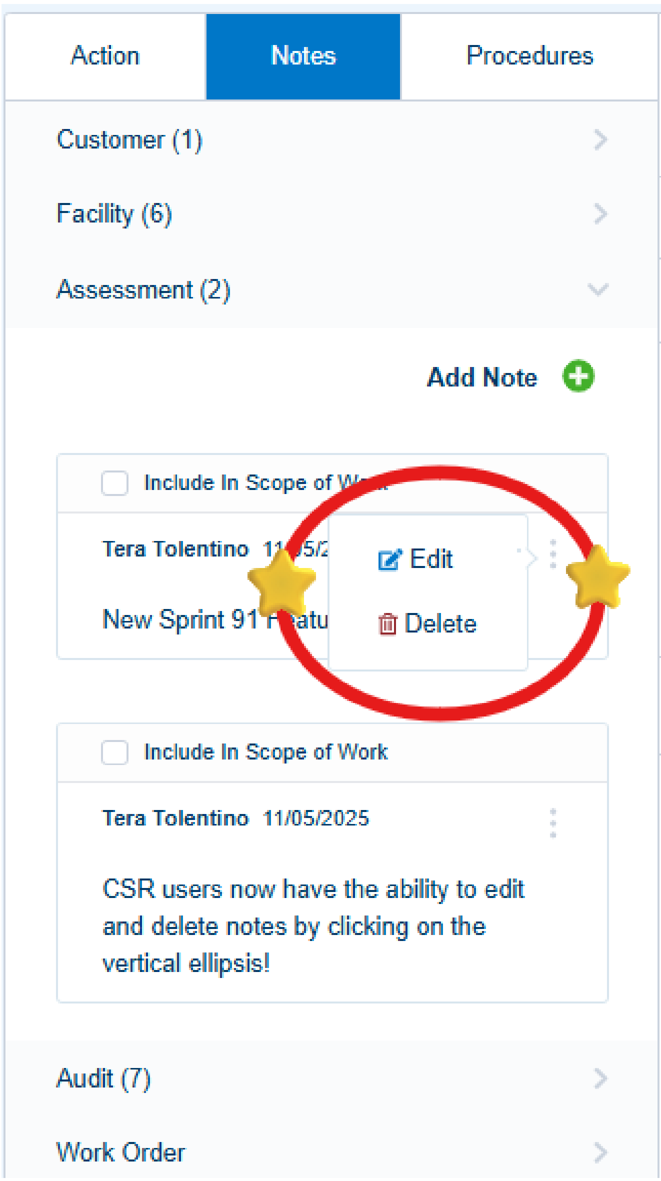
5.) CSR Role Can Edit Notes

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.



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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.