

# SPRINT 92

## Release Notes

NOVEMBER 18, 2025

Deployment & Smoke Testing Scheduled for:

November 18, 2025 | 4AM - 9AM PST

## Overview

- 1.) Workspace Display Enhancement for: Audits | Assigned, Accepted, Rejected, Scheduled Filters
  - Default Column Display: Status Date Column now appears next to Status Column
- 2.) Customer Eligibility only Editable for CSR and UTIL Roles
- 3.) Proposed Qty for “No Change (NC)” Line Items Defaults to Zero
- 4.) Audit Financial Summary Dashboard Now Displays \$/kWh Savings Information
- 5.) New Multi-Entity Micro-App allows Users to Review Invoicing Documents
- 6.) Select Batch ID Drop Down Lists Now Display Invoice ID

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### 1.) Workspace Display Enhancement for: Audits | Assigned, Accepted, Rejected, Scheduled Filters

A new default display for the Audit Assigned, Accepted, Rejected, and Scheduled Status Filters now puts the “Status Date” column next to the Status columns.

Users still have the ability to re-arrange columns as they see fit.

Audit Assignment Status	Audit Status	Status Date
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### 2.) Customer Eligibility only Editable for CSR and UTIL Roles

For CSR + UTIL Roles: Able to select options from the Eligibility Drop Down List and save.

Eligibility ▼

Initial Utility Review Complete

Utility Eligibility Notes:

Eligibility:

Under Utility Review ▼

- Pending CAAA
- Eligible
- Ineligible
- Need CSR Review
- Under Utility Review**

Eligibility Verified Date:

For ESR + CCSR Roles: Drop down list is Read Only and appears Greyed Out

Eligibility ▼

Initial Utility Review Complete

Utility Eligibility Notes:

Eligibility:

Under Utility Review ▼

Eligibility Verified By:

Eligibility Verified Date:

Save

Please note: This Eligibility Panel is not accessible to the PAD, FIN, AUD, and INST roles.

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### 3.) Proposed Qty for “No Change (NC)” Line Items Defaults to Zero

When Auditors enter a Base Condition that results in a “No Change” Proposed Activity, the Proposed Qty Defaults to 0 and cannot be edited.

The screenshot displays two sections: "Base Condition" and "Proposed".

- Base Condition:** Shows "EXIT Incandescent (1) 50W lamp" with a "Fixture Height" of 12. The quantity is set to 15.
- Proposed:** Shows "No Change" with a "Fixture Height" of 12. The quantity is set to 0.

This information is also reflected on the Scope of Work:

#### Scope Of Work

Installation Type: Retrofit Lighting

Existing Qty	Existing Condition	Proposed Activity	Proposed Qty
15	EXIT Incandescent (1) 50W lamp	No Change -	0

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### 4.) Audit Financial Summary Dashboard Now Displays \$/kWh Savings Information

For ESR and CSR Roles:

Financial Summary	kWh Summary	kW Summary
<ul style="list-style-type: none"><li>Project Price \$3,201.88</li><li>Current Annual Energy Cost \$5,782.98</li><li>New Annual Energy Cost \$1,959.48</li><li>Annual Energy Cost Savings \$3,823.50</li></ul>	<ul style="list-style-type: none"><li>Current Annual kWh 29,624.7</li><li>New Annual kWh 9,981.94</li><li>kWh Annual Savings 20,114.02</li><li><b>\$/kWh Savings \$0.16</b></li><li>CO<sub>2</sub>e Reduction (mt) 5.556</li></ul> <p><small>*mt converted from lbs **609lbs CO<sub>2</sub>e per MWh</small></p>	<ul style="list-style-type: none"><li>Current kW 3.529</li><li>New kW 1.184</li><li>kW Savings 2.345</li></ul>

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### 5.) New Multi-Entity Micro-App allows Users to Review Invoicing Documents

Steps To Review Invoicing Documents Within The Utility Invoice Builder:

- 1.) Select Installations and Audits to be Invoiced
- 2.) Enter an Invoice ID
- 3.) Create a Batch

The screenshot shows the 'Invoice Billing' interface. At the top, there is a 'Filter by Date Range' set to '10/01/2025 - 12/31/2025' and a 'Select Existing Batch ID' field. Below this, the 'Invoice ID' field contains 'RELEASENOTES92' and the 'Invoice Date' field is set to 'mm/dd/yyyy'. A 'Create Batch' button is highlighted with a red box and a circled '3'. The 'Installations (2 Selected)' and 'Audits (1 Selected)' tabs are also highlighted with a red box and a circled '1'. The 'Program Documents' and 'Invoice Documents' tabs are visible at the bottom.

- 4.) Once a Batch is Created, Approved Supporting Documents for the Selected Projects will Appear Under the Invoice Documents Tab.

The screenshot shows the 'Invoice Billing' interface with the 'Invoice Documents' tab highlighted. The 'Invoice ID' field contains 'RELEASENOTES92' and the 'Invoice Date' field is set to '11/17/2025'. Below the tabs, there is a table of 'Audit/Project Documents' with columns for Reference Number, Project Name, Document Type, Document Name, Upload Date, Status Date, and Actions.

Reference Number	Project Name
LA0248348.1	FLOWERBOB INC

  

Document Type	Document Name	Upload Date	Status Date	Actions
Audit Invoice Approved	LA0248348.1_Subcontractor Audit Invoice.pdf	11/13/2025	11/13/2025	Download

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### 6.) Select Batch ID Drop Down Lists Now Display Invoice ID

Utility Invoice Builder View:

The screenshot shows the 'Invoice Billing' interface. It includes a 'Filter by Date Range' section with a 'Select Range' dropdown. Below this are fields for 'Invoice ID' and 'Invoice Date' (with a date format 'mm/dd/yy'). A 'Select Existing Batch ID' dropdown is open, displaying a list of batch IDs: 10005, 10006, 10007, INVTEST3, and RELEASENOTES92. At the bottom, there is a message: 'Please choose an Invoice to load Documents.'

UTIL Role | Invoice Documents View (Approved Documents from Invoices with a Billed Date Appear Here):

The screenshot shows the 'UTIL Role | Invoice Documents View' interface. On the left is a navigation menu with items: HOME, Customer Calls, Customer Search, Work Order Search, Workspace, and Invoice Documents (which is highlighted). On the right, a 'Select Invoice' dropdown is open, displaying a list of invoice IDs: LAINVO324, 00011100011, TEST456, INVTEST1, and 00011.