

# SPRINT 94

## Release Notes

JANUARY 27, 2026

Deployment & Smoke Testing Scheduled for:

January 27, 2026 | 4AM - 9AM PST

## Overview

- 1.) **New Power BI Reports and Dashboards to Track Sales Performance**
- 2.) **ESR Role Enhancements:**
  - New Assessment View
  - Secondary Assessments now Appear on Dashboard
- 3.) **ESR, AUD, and INST Dashboard Enhancement: Measure Type Column**
- 4.) **New Price Per Work Order Summary**
- 5.) **Separate Material Picklist and Material Credit Orders Generated for Projects with Multiple Vendors**
- 6.) **Supporting Documents Enhancements:**
  - New Initial Approval Status
  - Ability to Filter by “Status” and “Uploaded By”
  - Setting Approved Status makes Supporting Document(s) Visible to the Utility
- 7.) **Subcontractor Logos Appear on Platform-generated Audit Time Log Invoice**

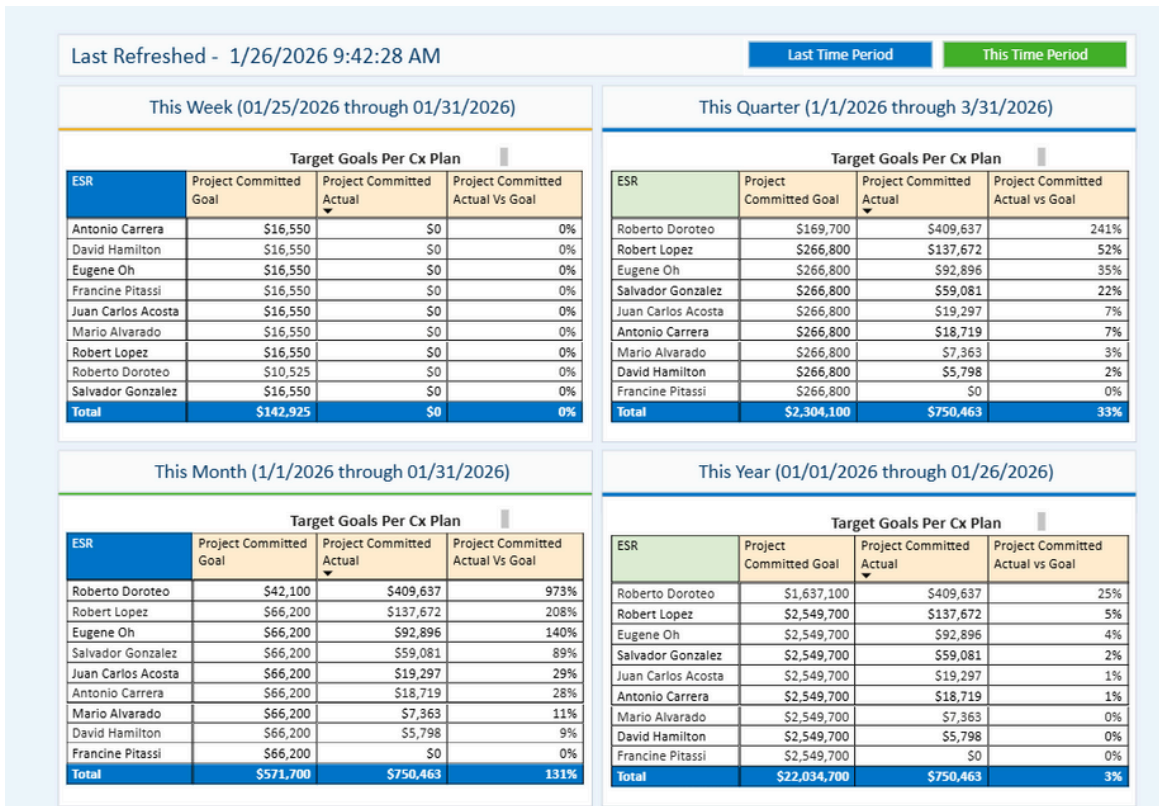
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### 1.) New Power BI Reports and Dashboards to Track Sales Performance

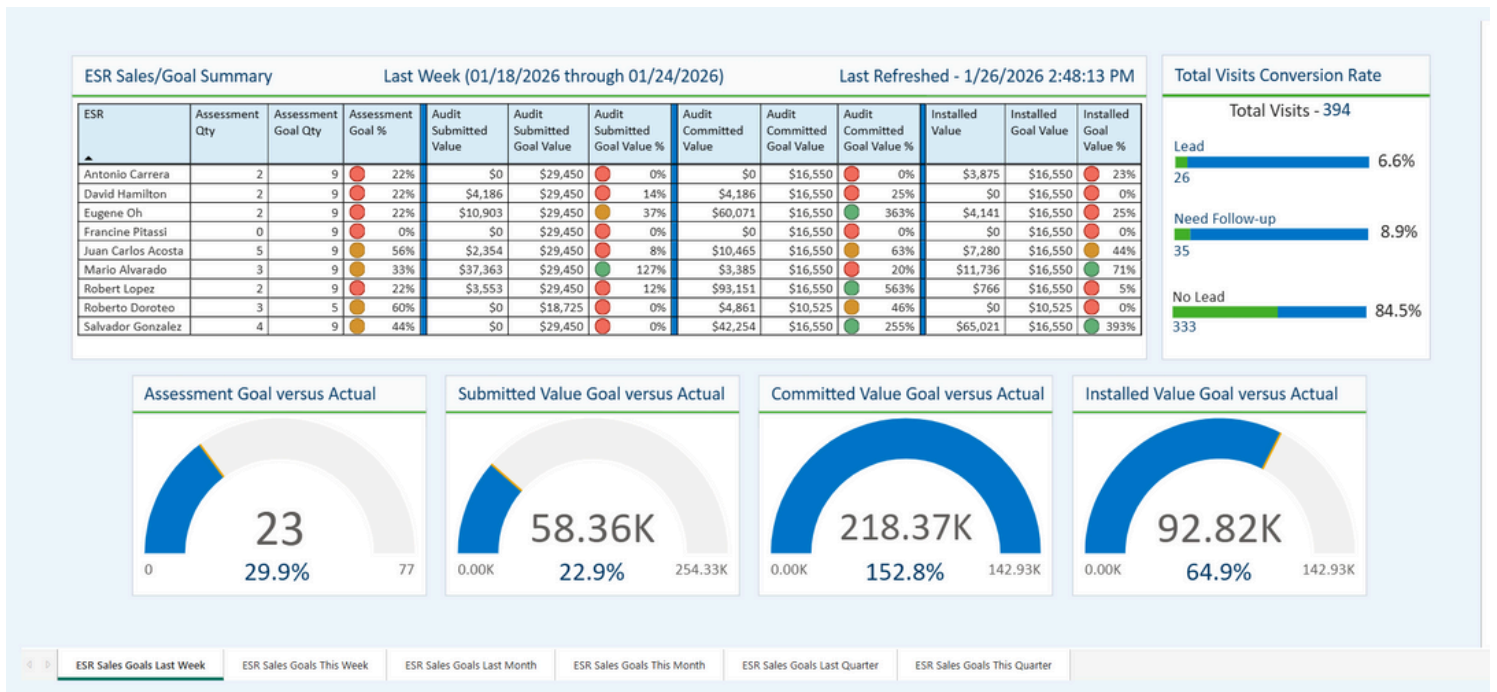
ESR Productivity Dashboard:



(Example shows UAT data, which does not accurately reflect live data)

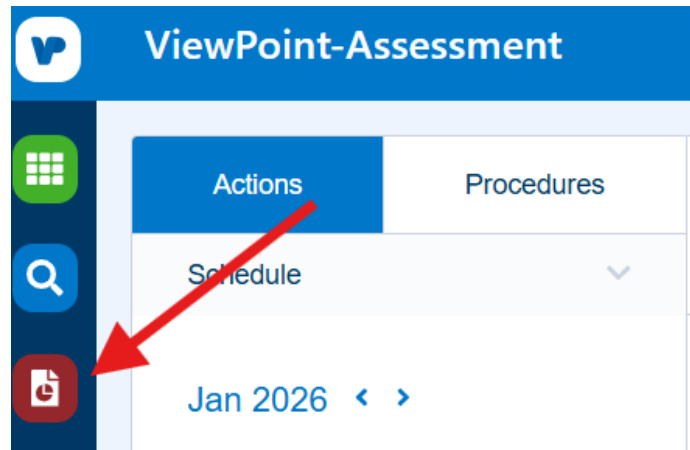
ESR Sales and Goals Dashboard:

Tabs at the bottom of the screen let users choose different time frames to view goals over a selected period.



(Example shows UAT data, which does not accurately reflect live data)

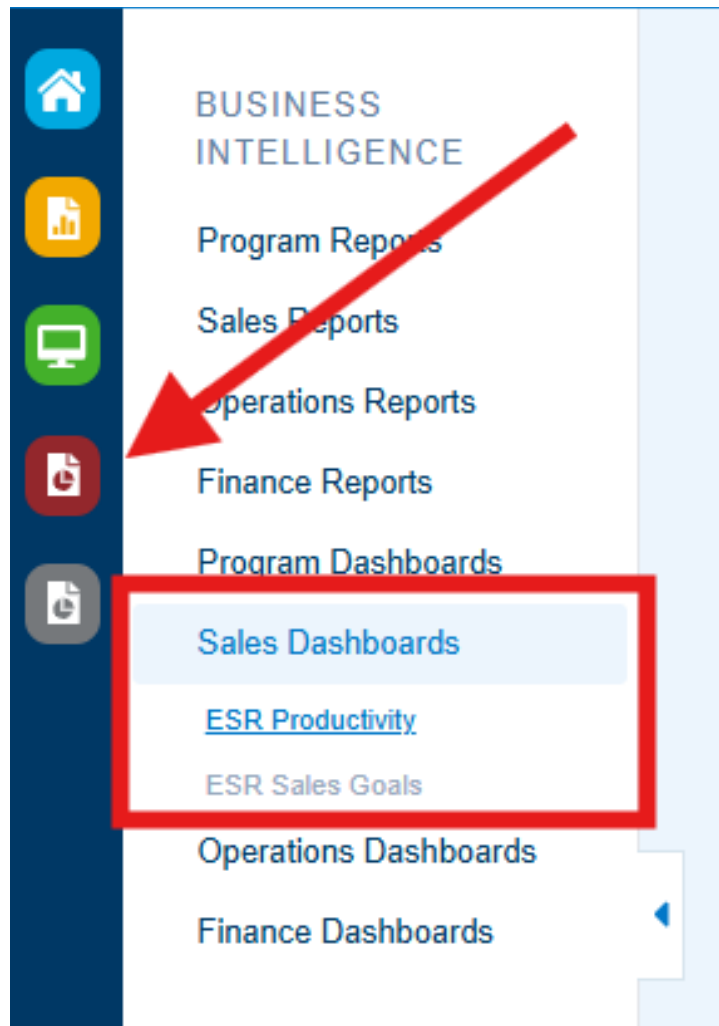
ESR Role: To access these reports and dashboards click on the maroon Power BI Reports icon in the top left



Click on "Sales Dashboards" then make a selection between the ESR Productivity and ESR Sales and Goals dashboards.



CSR + PAD Roles: To access these reports and dashboards click on the maroon Power BI Reports icon in the top left, then click on Sales Dashboards. From there, make a selection between the ESR Productivity and ESR Sales and Goals dashboards.



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### 2.) ESR Role Enhancements:

- New Assessment View

For ESRs, the “Customer Site” and “Assessment Information” pages have been combined into a single page called “Assessment Information”

Assessment Information	Audits	Work Orders	Warranty
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- Secondary Assessments now Appear on Dashboard

When a user creates multiple assessments for the same customer, the secondary assessment will appear as its own unique record within the ESR Dashboard. Previously, secondary assessments would only appear when an audit was created for that record.

[REDACTED]	COMPANY LLC	LA0331196.1	11824	[REDACTED]	BLVD
[REDACTED]	COMPANY LLC	LA0331196.2	11824	[REDACTED]	BLVD

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### 3.) ESR, AUD, and INST Dashboard Enhancement: Measure Type Column

The New Measure Type column identifies the measure associated with each record.

ESR View:

Priority		Prospects		Leads			
All Assignments		Audits		Proposals			
Priority	Status	Status Date	Measure Type	Reference Number	City	Zip	Account Num
<input checked="" type="checkbox"/>	Submitted	12/19/2025	Lighting/Refrigeration	LA0295567.1	LOS ANGELES	90004	⋮
<input checked="" type="checkbox"/>	Submitted	12/22/2025	Lighting/Refrigeration	LA0295141.1	LOS ANGELES	90007	⋮
<input checked="" type="checkbox"/>	Submitted	12/29/2025	Lighting/Refrigeration	LA0223205.1	LOS ANGELES	90027	⋮
<input checked="" type="checkbox"/>	Submitted	12/29/2025	Heat Pump Water Heater	LA0223205.2	LOS ANGELES	90027	⋮

AUD View:

Ready To Audit						Scheduled	In Progress	Submitted
Status	Status Area	Measure Type	Reference Number	City	Address			
Accepted		Heat Pump Water Heater	LA0263753.2	ENCINO				
Accepted		Lighting/Refrigeration	LA0270947.1	LOS ANGELES				

INST View:

Assigned								Scheduled	Post Inspection
Status	Work Order ID	Work Order Revenue	REC Type	Measure Type	City	Zip	Address		
Install Assigned	LA0270947.2.3	\$1,394.28	Heat Pump Water Heater	Heat Pump Water Heater	LOS ANGELES	90041			

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### 4.) New Price Per Work Order Summary

A project's Financial Aid and Savings Summary page now displays a Price Per Work Order summary for all installation types.

The screenshot displays a software interface with a sidebar on the left and a main content area. The sidebar includes a menu with the following items: Status, Post Install Checks, Financial And Savings Summary (highlighted with a red box), Financial and Savings Summary (selected with a blue dot), Customer Information, and Enerworks Data. The main content area is divided into four panels: Financial Summary, kWh Summary, kW Summary, and Per Work Order (highlighted with a red box). The Financial Summary panel lists: Project Price (\$2,658.60), Current Annual Energy Cost (\$116.34), New Annual Energy Cost (\$34.90), and Annual Energy Cost Savings (\$172.50). The kWh Summary panel lists: Current Annual kWh (5,241.6), New Annual kWh (1,572.48), kWh Annual Savings (4,329.56), \$/kWh Savings (\$0.61), and CO<sub>2</sub>e Reduction (mt) (1.196). The kW Summary panel lists: Current kW (0.559), New kW (0.168), and kW Savings (0.425). The Per Work Order panel lists two entries: Price: LA0270947.2.2 (\$1,264.32) and Price: LA0270947.2.3 (\$40,858.32).

Section	Item	Value
Financial Summary	Project Price	\$2,658.60
	Current Annual Energy Cost	\$116.34
	New Annual Energy Cost	\$34.90
	Annual Energy Cost Savings	\$172.50
kWh Summary	Current Annual kWh	5,241.6
	New Annual kWh	1,572.48
	kWh Annual Savings	4,329.56
	\$/kWh Savings	\$0.61
	CO <sub>2</sub> e Reduction (mt)	1.196
kW Summary	Current kW	0.559
	New kW	0.168
	kW Savings	0.425
Per Work Order	Price: LA0270947.2.2	\$1,264.32
	Price: LA0270947.2.3	\$40,858.32

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### 5.) Separate Material Picklist, Material Change Orders, and Material Credit Orders Generated for Projects with Multiple Vendors

When there are multiple vendors, users are able to distinguish which documents correspond to which vendor by checking the Meta Data column.

Subcontractor View:

Type	Date Created	Date Revised	Meta Data
Scope of Work	01/27/2026	01/27/2026	
Material Pick List	01/27/2026	01/27/2026	Supply Patriot
Material Pick List	01/27/2026	01/27/2026	Rexel Energy Solutions
Material Change Order	01/27/2026	01/27/2026	Supply Patriot
Material Change Order	01/27/2026	01/27/2026	Rexel Energy Solutions
Material Credit Order	01/27/2026	01/27/2026	Rexel Energy Solutions

CSR View:

Type	Date Created	Date Revised	Meta Data
Scope of Work	01/27/2026	01/27/2026	⋮
Material Purchase Order	01/27/2026	01/27/2026	Supply Patriot ⋮
Material Purchase Order	01/27/2026	01/27/2026	Rexel Energy Solutions ⋮
Material Change Order	01/27/2026	01/27/2026	Supply Patriot ⋮
Material Change Order	01/27/2026	01/27/2026	Rexel Energy Solutions ⋮
Material Credit Order	01/27/2026	01/27/2026	Supply Patriot ⋮
Material Credit Order	01/27/2026	01/27/2026	Rexel Energy Solutions ⋮

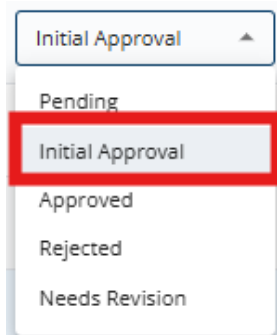
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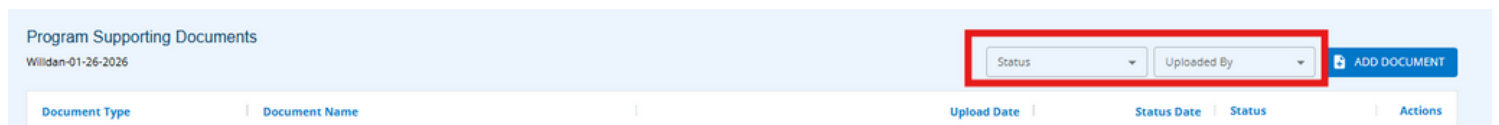
### 6.) Supporting Documents Enhancements:

- “Initial Approval” has been added to the list of possible statuses a user can select



- Ability to Filter Program Supporting Documents by “Status” and “Uploaded By”

“Status” filters Supporting Documents by their status. “Uploaded By” filters Supporting Documents by subcontractor.



- Setting Approved Status makes Supporting Document(s) Visible to the Utility

Setting the status to “Approved” will lock the Supporting Document’s status, prevent users from deleting it, and make it visible to the Utility.



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### 7.) Subcontractor Logos Appear on Platform-generated Audit Time Log Invoice

When subcontractors generate their Audit Time Invoice within ViewPoint....

Time Log +

Audit Fee

Name	Audit Date	Rate Type	Total Hours	Notes	Shift
Tera Tolentino	01/16/2026	Journeyman	4		First Shift (Day Shift) – Straight Time

1 - 1 of 1

Show Up Pay

Name	Audit Date	Rate Type	Total Hours	Notes	Shift
No Rows To Show					

Audit Time Invoice Generate Documents

Name	Date Created	Date Revised
LA0242771.1_Subcontractor Audit Invoice.pdf	01/16/2026	01/16/2026

Their logo will appear on the invoice:

Accurate Energy Services:



**Sub-Contractor Information**  
Subcontractor: Accurate Energy Services, Inc

**LADWP CDI Program Invoice**

**Invoice Information**  
Sub Amendment No: 001

Del's Electric:



Sub-Contractor Information

### LADWP CDI Program Invoice

Invoice Information

Energy Management Pros.:



Sub-Contractor Information  
Subcontractor: Energy Management Pros, Inc

### LADWP CDI Program Invoice

Invoice Information  
Sub Amendment No: 001

GECTWO Inc.:



Sub-Contractor Information  
Subcontractor: GECTWO, Inc

### LADWP CDI Program Invoice

Invoice Information  
Sub Amendment No: 001

New Wave Telect:



Accelerating the Transmission of Intelligence

Sub-Contractor Information  
Subcontractor: New Wave Telect

### LADWP CDI Program Invoice

Invoice Information  
Sub Amendment No: 001

Volt Electric:



Sub-Contractor Information  
Subcontractor: Volt Electric

### LADWP CDI Program Invoice

Invoice Information  
Sub Amendment No: 001