

# SPRINT 95

## Release Notes

March 10, 2026

Deployment & Smoke Testing  
Scheduled for:

MARCH 10, 2026 | 4AM - 11AM PST

## Overview

- 1.) New ViewPoint Role: USD Representative
- 2.) Display Updates and Fixes Throughout the Platform:
  - UTIL & CSR: “Leads” Section now displays correct counts
  - UTIL & CSR: Leads | “Qualified” filter only displays records with uploaded CAAA
  - All Roles: New “Measure Type” Column
  - UTIL, CSR, & CCSR: Supporting Documents Workspace Enhancements
- 3.) Update to Assessment Process: “Mixed Measures” Measure Type
- 4.) Updated HPWH Survey
- 5.) “Self Audit” Renamed to “Scope Validation”
- 6.) New Audit Time Log Process
  - Select Trade Type
  - Bug Fix: AUD, CCSR, and CSR Roles are able to update Audit Dates
  - Subcontractor Audit Time Invoice Enhancements
- 7.) PAR Enhancement: PAR will generate even when an audit contains only “No Change” items

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### Overview (Continued)

8.) HPWH Projects Split into HPWH Electrical and HPWH Plumbing Work Orders

9.) Project Phase Enhancements:

- CCSR + CSR: Show-Up Dates
- CSR: “Approval” Section Moved to “Work Order” Tab
- CSR: New “Ready for Billing” Checkbox

10.) Program Documents Enhancements:

- New Supporting Document Type: Marketing Invoice
- CSR: Users can rename files
- CSR: Subcontractor drop down list allows users to make Program Documents visible to a specified subcontractor organization

11.) Invoicing Enhancement: HPWH Rec Type Cost Totals

12.) New Terms and Conditions Appear on the Following Documents:

- Customer Assessment and Audit Authorization (CAAA)
- Proposed Activity Report (PAR)
- Customer Work Authorization (CWA)
- Project Completion Form (PCF)

13.) New Prospect Statuses: “Duplicate - Do not Use,” “No Lead - DWH < 30g,” “Future Lead - DWH > 50g”

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### 1.) New ViewPoint Role: USD Representative

The USD Representative (USDR) role can access approved LAUSD-specific data and reports.



To obtain USDR permissions, please submit an Application Access Request by completing the following steps:

- Access the request form by using the link below:

[https://willdan.service-now.com/now/sow/record/sc\\_cat\\_item/152ff3542b4ea61005d5feb9f291bfea](https://willdan.service-now.com/now/sow/record/sc_cat_item/152ff3542b4ea61005d5feb9f291bfea)

- Fill in the required Application Access Request fields

## Application Access Request

\* Indicates required

### User Information

Part of an ACD request

CC

Start Date

MM/DD/YYYY



\* Requester

Department of Requester

\* User to be receiving

Organization ID of receiver

\* Requested Application Access

- Part of an ACD Request: Check this box if you are requesting access for a new user
- CC: Anyone listed here will be CC'ed on emails regarding this request
- Requester: Name of the user submitting the request
- Start Date: Fill in with the date access to the new role should begin
- Department of Requester: Will auto-populate based on what is entered in the "Requester" field
- User to be receiving: Fill in with the name of the user you are requesting the USDR role for
- Organization ID of receiver: If this is part of an ACD activation request, enter the ID for LADWP (WW.2A.20). If the user is already active within ViewPoint, this field will auto-populate with the LADWP ID
- Requested Application Access: Enter: ViewPoint (LADWP). Upon entering this information, additional questions will appear within the form

\*Requested Application Access

✕ Viewpoint (LADWP)

\*VP User Full name

\*VP Role

\*VP User Email

\*VP Organization

\*Tech Classification

\*Phone Number

Comments

- VP User Full name: Fill out with the information of the user you are requesting the USDR role for
- VP Role: Select: USDR (USD Representative) **This role has not been added to the “VP Role” drop down list. IT is working to add this new option. For the time being, please use the “Comments” section to write in a request for the USDR role.**
- VP User Email: Fill out with the information of the user you are requesting the USDR role for
- VP Organization: Type in “Willdan”
- Tech Classification: Type in “N/A”
- Phone Number: Fill out with the information of the user you are requesting the USDR role for
- Once all of these fields are filled out, click on the “Submit” button on the right

Application Access Request

Submit

*Please Note: USDR role permissions can only be granted to users within the Willdan organization.*

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## 2.) Display Updates and Fixes Throughout the Platform

- UTIL & CSR: “Leads” filters (Unsurveyed, Lead, No Lead, Qualified, and Need Follow-up) now shows correct counts

The screenshot shows a 'Leads' filter menu with the following options and counts:

- Unsurveyed (19970)
- Lead (52)
- No Lead (10932)
- Qualified (54)
- Need Follow-Up (1095)
- All (32103)

Two red callout boxes are present:

- A box on the right contains the text: "The sum of these values now add up to the 'All' filter value". Red arrows point from this box to the 'Unsurveyed', 'Lead', 'No Lead', 'Qualified', and 'Need Follow-Up' options.
- A box on the left contains the text: "These values now match". A red arrow points from this box to the 'Lead (52)' option.

The screenshot shows a table with a 'Total Assignments' column containing the value '52'. A red callout box points to this value with the text: "These values now match".

Below the table, a 'Leads' filter menu is visible with the following options:

- Unsurveyed (19970)
- Lead (52)

A red callout box points to the 'Lead (52)' option with the text: "These values now match".

The table header includes columns: Status, Assessment ID, Status Area, Status Date, Account Number, and Customer Name.

- UTIL & CSR: Leads | “Qualified” filter only displays records with uploaded CAAA

The screenshot displays a workspace interface. On the left, a 'Filters' sidebar is active, showing 'Leads' filtered to 'Qualified (55)'. The main workspace area shows a 'Total Assignments' of 55. Below this, a table lists 'Qualified' assignments with columns for Status, Assessment ID, Status Area, and Status Date.

Status	Assessment ID	Status Area	Status Date
Qualified	LA0099632.1		03/04/2026
Qualified	LA0240153.1		03/06/2026
Qualified	LA0209020.1		03/05/2026

All customer records found in this area of the Workspace will have a CAAA uploaded. Customers marked as “Qualified” without an uploaded CAAA can be found under the “Lead” filter.

- All Roles: New “Measure Type” Column

The new “Measure Type” column will display the measure type (Lighting/Refrigeration, HPWH, or Mixed Measures) specified during the assessment phase. It can be found within the following:

- UTIL, CSR, and CCSR Workspaces
- CSR “Assessments & Audits” search results table
- CCSR “Customer Search” search results table
- CSR + CCSR “Search & Assign” search results table
- ESR, AUD, and INST Dashboards

*Please Note: This new column will appear at the far right end at each of these displays. Users will have to scroll to the right to find it. By clicking on the column name and dragging it, users can rearrange the order in which these columns are displayed.*



*(The floating column name preceded by the diamond symbol indicates it can be moved)*

- CSR & CCSR: Supporting Documents Workspace Enhancements

Users can filter by the “Initial Approval” status for Audit and Project Supporting Documents. Filters also display counts.

#### Audit Supporting Documents

- Pending (163) ←
- Initial Approval (5)
- Approved (17) ←
- Rejected (4) ←
- Needs Revision (4) ←
- All (176)

#### Project Supporting Documents

- Pending (115) ←
- Initial Approval (5)
- Approved (28) ←
- Rejected (6) ←
- Needs Revision (7) ←
- All (137)

*Important Items to Note:*

1 – The “All” filter for both sections displays the amount of Audits or Projects that have Supporting Documents. **It does not reflect the amount of Supporting Documents that have been uploaded to the platform.**

2 – Audit Supporting Documents:

The “Initial Approval” and “Approved” counts are not correct. **A fix will be implemented in a future sprint.**

3 – Project Supporting Documents:

The “Initial Approval,” “Approved,” “Rejected,” and “Needs Revision” counts are not correct. **A fix will be implemented in a future sprint.**

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### 3.) Update to Assessment Process: “Mixed Measures” Measure Type

ESRs will find new selections available in the “Measure Type” drop down list.

Prospecting Steps ▼

\* Prospect Status:

Lead ▼

\* Prospect Status Reason:

Moving to Assessment ▼

Prospect Source:

Lead from LADWP ▼

\* Measure Type:

Lighting/Refrigeration ▼

- ASH-C Only
- Motors-Only
- Lighting/Refrigeration
- Refrigeration Combined
- HPWH-Gas(Plumbing)
- HPWH-Gas(Electrician)
- HPWH-Electric(Plumbing)
- HPWH-Electric(Electrician)
- Mixed Measures

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### 4.) Updated HPWH Survey

For Plumbing Auditors:

- At the top each page, there is a new “Display ESR Responses” check box. Checking this box will display the survey responses entered by the ESR during the assessment.

Survey View:

Display ESR Responses

#### Updated HPWH Space and Electrical Questions

- **New Question:**

Are there any room obstructions that need to be considered prior to installing a new HPWH?

EA Response:

Yes

No

- **New Follow-Up Question:** “Are there any room obstructions that need to be considered prior to installing a new HPWH?” - Selecting “Yes” will reveal questions regarding the dimensions of the obstruction. If “No” is selected, the follow up questions will not appear.

Are there any room obstructions that need to be considered prior to installing a new HPWH?

EA Response:

Yes  No

What is the volume of any major obstructions in the room?

Obstruction Length

EA Response:

Obstruction Width

EA Response:

Obstruction Height

EA Response:

- **New Question:**

How many feet to the nearest drain?

EA Response:

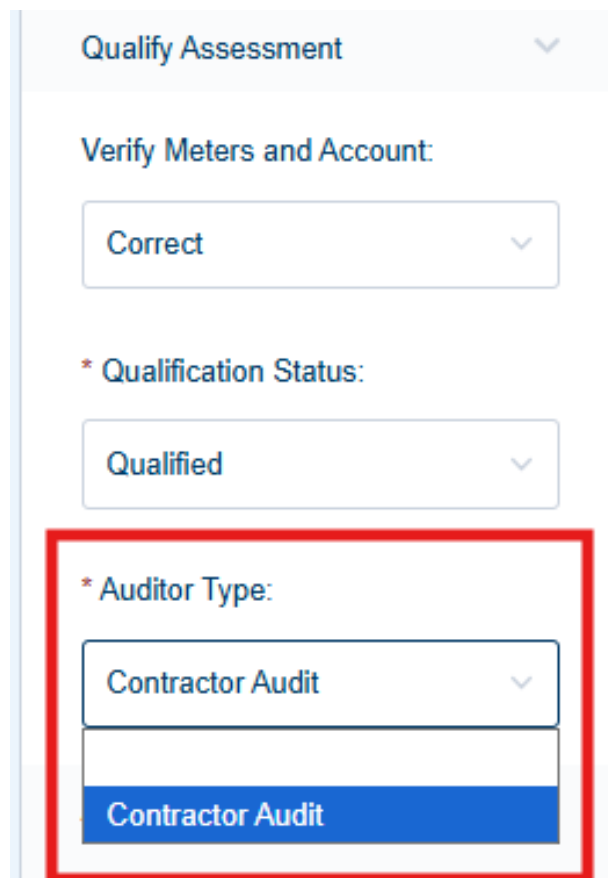
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### 5.) “Self Audit” Renamed to “Scope Validation”

When filling out an assessment, ESRs will only be able to select “Contractor Audit” from the “Auditor Type” drop down list.



The screenshot shows a form titled "Qualify Assessment" with a dropdown arrow. Below the title is the section "Verify Meters and Account:" with a dropdown menu showing "Correct". Below that is the section "\* Qualification Status:" with a dropdown menu showing "Qualified". The section "\* Auditor Type:" is highlighted with a red border and shows a dropdown menu with "Contractor Audit" selected and highlighted in blue. The dropdown menu is open, showing "Contractor Audit" as the selected option.

When reviewing an assessment, CSRs will have the ability to set the “Auditor Type” to “Scope Validation.”

Qualifying Steps ▼

Verify Meters and Account:

Correct ▼

\* Qualification Status:

Qualified ▼

\* Auditor Type:

Scope Validation ▼

Contractor Audit

Scope Validation

*Please Note: If “Scope Validation” is selected and the “Audit” button is pressed, an audit will be created and users will no longer be able to assign the customer to a subcontractor. If a customer needs to be assigned to a subcontractor **after the scope validation process has begun**, users must submit a HelpDesk ticket. The Dev Team will need to delete the existing audit before the customer can be assigned.*

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### 6.) New Audit Time Log Process

#### Trade Type

New “Trade Type” drop down lists have been added to the Audit Time Log process and are crucial to properly logging time. The new Audit Time Log process is as follows:

**Step 1:** Once a user has accessed the Audit Time Log, begin with the new “Trade Type” drop down list on the left side of the screen.

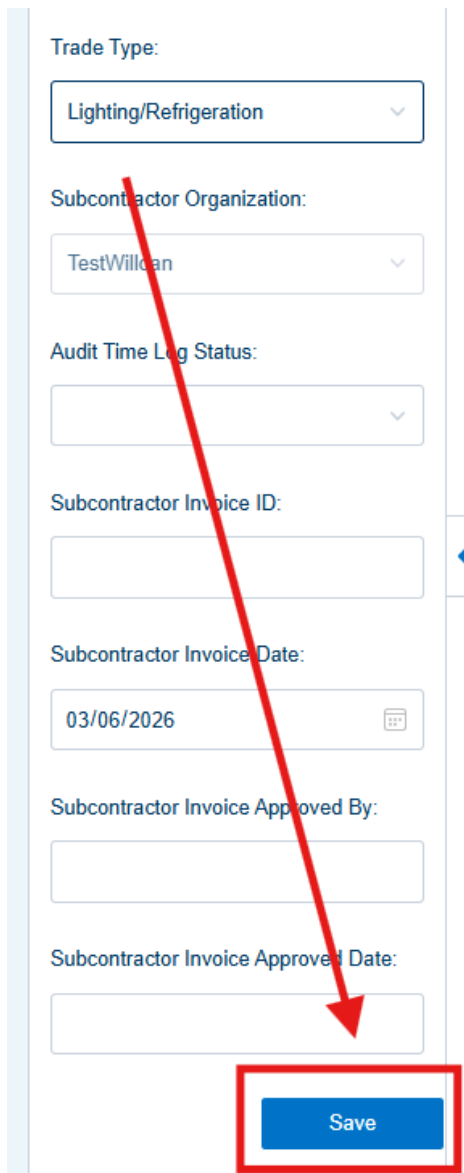
The screenshot displays the Audit Time Log interface. On the left, a sidebar menu includes 'Action', 'Notes', and 'Procedures'. The 'Trade Type' dropdown menu is highlighted with a red box and is open, showing options: Plumbing, Electrical, Lighting/Refrigeration, and Build Floors & Rooms. The main content area on the right includes a 'Status Area' with an 'Active' indicator, a 'Time Log' section with a green plus icon, and an 'Audit Fee' section with a table. The table has columns for 'Name', 'Audit Date', 'Rate Type', and 'Total Hours'. Below the table is a 'Show Up Pay' button.

- Plumbing: Select this trade type when logging HPWH audit time associated

- with HPWH-Gas (Plumbing) or HPWH-Electric (Plumbing) measure types.
- Electrical: Select this trade type when logging HPWH audit time associated with HPWH-Gas (Electrician) or HPWH-Electrical (Electrician) measure types.
  - Lighting/Refrigeration: Select this trade type when logging audit time associated with ASH-C Only, Motors, Refrigeration Combined, or Lighting/Refrigeration measure types.

*Please Note: If a selection has not been made, audit time log entries **will not appear for the AUD and CCSR roles.***

**Step 2:** After selecting a trade type, click on the “Save” button that appears below



The image shows a vertical form with several input fields. A red arrow originates from the 'Trade Type' dropdown menu, which is set to 'Lighting/Refrigeration', and points down to a blue 'Save' button at the bottom of the form. The 'Save' button is also enclosed in a red rectangular box. The form fields include:

- Trade Type: Lighting/Refrigeration
- Subcontractor Organization: TestWillcan
- Audit Time Log Status: (empty dropdown)
- Subcontractor Invoice ID: (empty text box)
- Subcontractor Invoice Date: 03/06/2026
- Subcontractor Invoice Approved By: (empty text box)
- Subcontractor Invoice Approved Date: (empty text box)

Once the “Save” button has been clicked, a “Subcontractor Invoice ID” will be generated. If users prefer a different invoice ID, this field can be edited. This field will become locked once the Audit Time Log status is set to “Subcontractor Invoice Approved”

Trade Type:

Lighting/Refrigeration

Subcontractor Organization:

TestWilldan

Audit Time Log Status:

Subcontractor Invoice ID:

1-0248719.1.LR

Subcontractor Invoice Date:

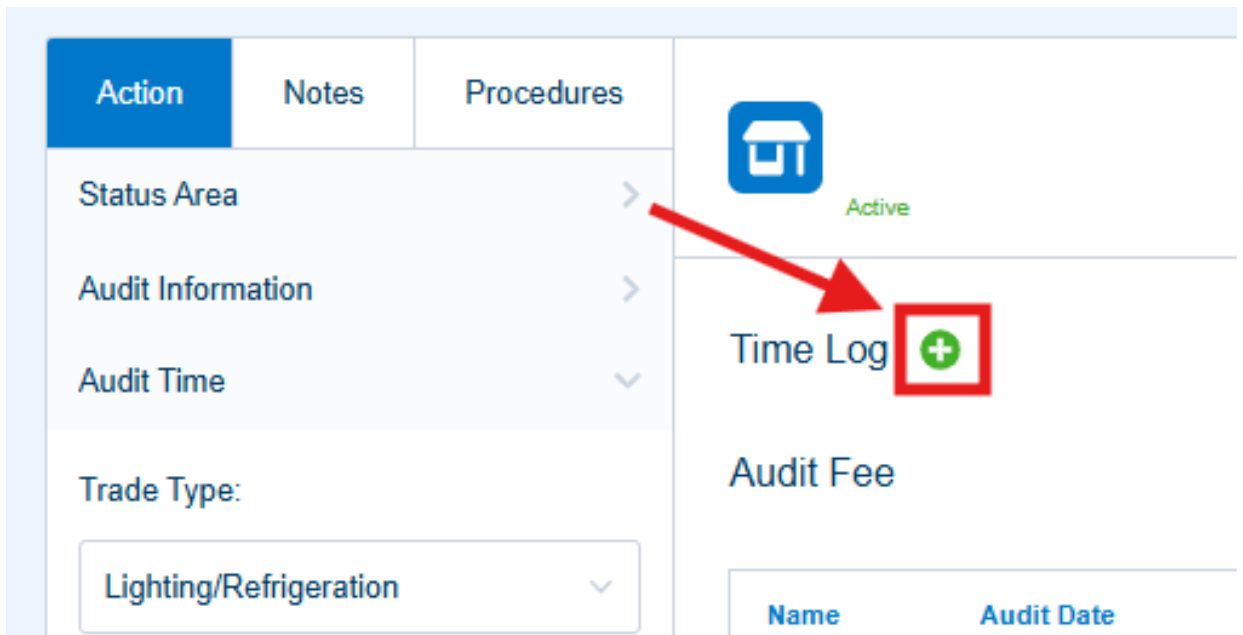
03/06/2026

Subcontractor Invoice Approved By:

Subcontractor Invoice Approved Date:

Save

**Step 3:** To access the “Add Time Log” modal click on the green “+” next to “Time Log”

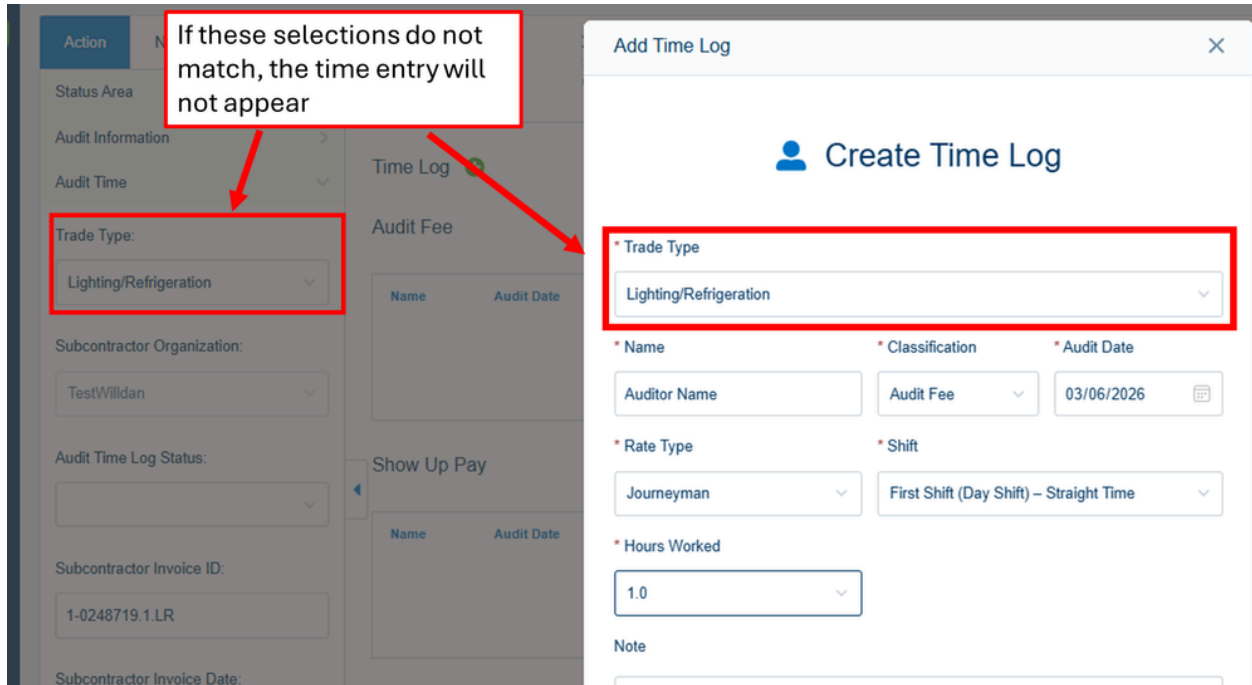


**Step 4:** Within the “Add Time Log” modal, find the new “Trade Type” drop down list, and select the trade type you are logging audit or show up time for.

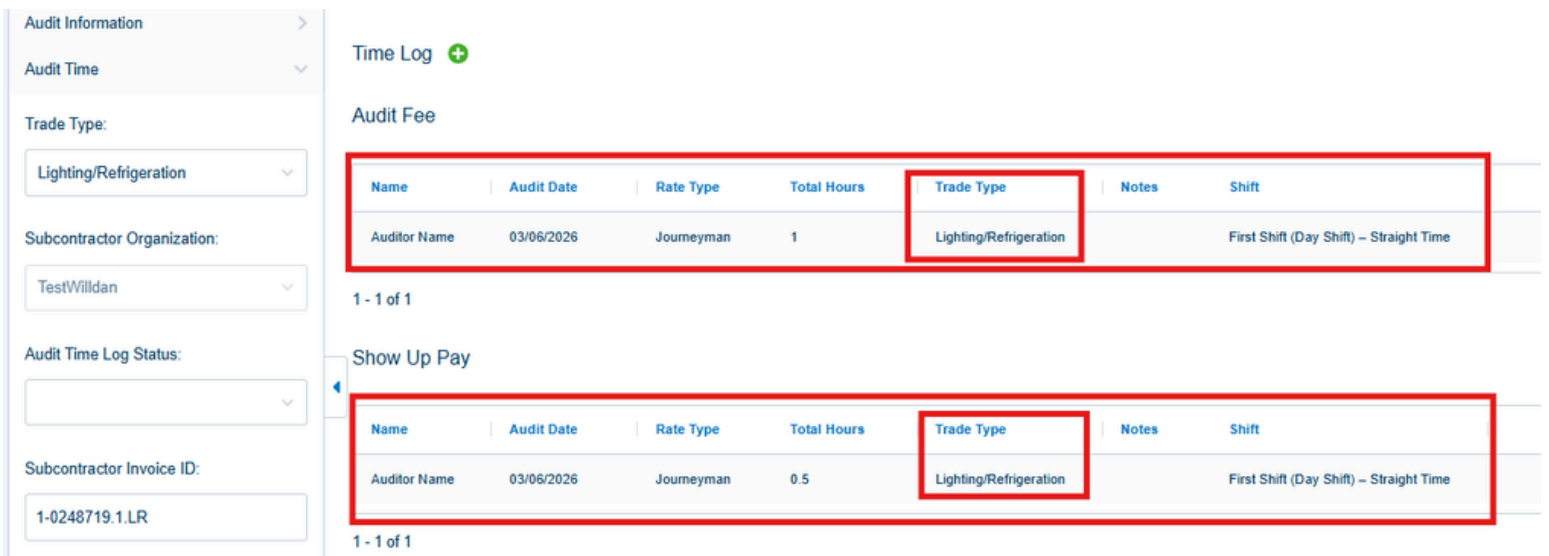
A screenshot of the 'Add Time Log' modal. The title bar says 'Add Time Log' with a close button. Below the title bar is a blue person icon and the text 'Create Time Log'. The main form area contains several fields: a dropdown menu for 'Trade Type' which is open, showing three options: 'Plumbing', 'Electrical', and 'Lighting/Refrigeration'. Below this are two more dropdown menus: 'Rate type' and 'Shift', with 'First Shift (Day Shift) – Straight Time' selected. Below these is a dropdown menu for '\* Hours Worked'. At the bottom is a text area for 'Note'. At the very bottom are two buttons: 'Cancel' and 'Save'.

Once the trade type selection has been made, fill out the remaining fields according to the previously established process and click on the “Save” button.

*Please Note: If the two “Trade Type” drop down lists do not match, the time entry will not appear in the Audit Time Log.*




**Step Five:** Once saved, time entries will appear in the “Audit Fee” and/or “Show Up Pay” tables, which now display trade type selections made within the “Add Time Log” modal



## Bug Fix: AUD, CCSR, and CSR Roles are able to update Audit Dates

The ability to click on the “calendar” icon within the “Audit Date” field and select a date has been restored. This functionality allows users to log audit time for audits that were performed on a previous day or for audits that were performed over multiple days.

Add Time Log ×

 Create Time Log


\* Trade Type  
Lighting/Refrigeration

\* Name Auditor Name      \* Classification Audit Fee

\* Rate Type Journeyman      \* Shift First Shift (Day Shift) - S

\* Hours Worked 0.5

Note

\* Audit Date 03/06/2026 


March 2026 ↑ ↓

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

Clear Today

## Subcontractor Audit Time Invoice Enhancements

1.) After audits are merged, when a user re-generates an Audit Time Invoice based off an Audit Time Log that contains multiple trade types, an invoice will be generated for each trade type.

Time Log 

Audit Fee

Name	Audit Date	Rate Type	Total Hours	Trade Type	Notes	Shift
Auditor Name	03/06/2026	Journeyman	1	Lighting/Refrigeration		First Shift (Day Shift) – Straight Time
Auditor Name	03/06/2026	Journeyman	1.5	Electrical		First Shift (Day Shift) – Straight Time


1 - 2 of 2

Show Up Pay

Name	Audit Date	Rate Type	Total Hours	Trade Type	Notes	Shift
Auditor Name	03/06/2026	Journeyman	0.5	Lighting/Refrigeration		First Shift (Day Shift) – Straight Time

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Audit Time Invoice


 [Generate Documents](#)

Name	Date Created	Date Revised
LA0248719.1_Subcontractor Audit Invoice_Electrical.pdf		03/06/2026
LA0248719.1_Subcontractor Audit Invoice_Lighting/Refrigeration.pdf		03/06/2026

2.) The header spacing on the platform-generated Subcontractor Audit Time Invoice has been improved.

Example:



APPROVED CONTRACTOR FOR  
Los Angeles  Department of Water & Power

## LADWP CDI Program Invoice

<b>Subcontractor:</b>	TestWilldan	<b>Sub Amendment No:</b>	001
<b>Street Number:</b>	2401 E Katella Ave STE 300	<b>Invoice No:</b>	1-0248719.1.E
<b>City, St, Zip:</b>	Anaheim, CA 92806	<b>Invoice Date:</b>	03/06/2026
<b>Phone:</b>		<b>Willdan Project Number:</b>	LA0248719.1
<b>Bill To:</b>	Willdan Group, Inc	<b>Audit Date:</b>	03/06/2026
	800 W 6th St, Suite 940, Los Angeles, CA 90017	<b>Business Name:</b>	
		<b>Customer Address:</b>	

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	1.5	\$0.00	\$0.00
Non-ECM Total						\$0.00

*Please note, this invoice was generated from a subcontractor organization that is solely used for test purposes, which is why the Willdan logo appears in the top left corner. Each subcontractor organization's logo will appear at the top of their own invoices. Additionally, the "Business Name" and "Customer Address" fields do populate. However to protect client privacy, this information has been redacted from the example invoice presented in this document.*

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### 7.) PAR Enhancement: PAR Will Generate, Even When an Audit Contains Only “No Change” Line Items

ESRs and CSRs can still generate a PAR even when audits result only in “No Change” Proposed Activities.

Example:



#### Proposed Activity Report

Business Information  
Tera's Test Record  
John Smith  
440 E 52nd St  
Los Angeles, CA 90011  
18-777-7777  
jshn@smith.com

Project Information  
Audit ID: LA0366846.2  
Audit Date: 03/05/2026

Energy Service Rep: Tera Tolentino  
Energy Service Rep Phone: 718-989-8989

Location				Existing Condition			Proposed Activity			Install	
Row	Ref #	Item No.	Location Notes	Activity Type	Existing Condition	Existing Qty	Proposed Activity	Proposed Qty	Yes	No	
1	10391	NC	Floor 1 - Lobby	No Change	Table Lamp with Incandescent 57 Watt A19 Lamp with MED Base	12	No Change - NC test notes 2	0		N	
2	10392	NC	Floor 1 - Lobby	No Change	4 ft Recessed Parabolic Troffer with (1) 4 ft 34 Watt T12 Fluorescent BiPin Lamp with 1 Standard Magnetic Ballast	10	No Change - NC test notes 1	0		N	
3	10393	NC	Floor 2 - Office	No Change	Recessed Parabolic Troffer LED VRK 2x2ft 25W	3	No Change - NC test notes 3	0		N	
Total Existing Conditions						25	Total Proposed Activities	0			

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### 8.) HPWH Projects Split into HPWH Electrical and HPWH Plumbing Work Orders By Measure Type

During the new workflow audits are submitted then merged in a process that takes place outside of the platform. (Merging outside of the platform is a temporary solution. In the meantime, please submit merge requests to Joe Crooms and Ameha Habtu.)

Once the audits are merged, records will remain in the system, resulting in audits with a “Merged” status and a single audit with a “Submitted” status.

#### Assessments & Audits

Assessment ID	Audit ID	Status
LA0241118.1	LA0241118.1	Submitted
LA0241118.2	LA0241118.2	Merged

Users should continue with the process using the audit with the “Submitted” status.

*Please Note: Regenerate the Audit Time Invoice from the “Submitted” status audit to view the Audit Time Invoices from the merged audits.*

Once the “Submitted” status audit is committed and split into work orders, users will find that the heat pump water heater projects are split by trade type.

HPWH Plumbing Work Order Example:

The REC Type appears as “Heat Pump Water Heater,” and the Line Item Summary displays plumbing-related heat pump water heater measures.

Work Orders

Audit ID	Work Order ID	REC Type	Contractor Assigned	Status	Campaign	Measure Type
LA0285090.1	LA0285090.1.5	Heat Pump Water Heater		Ready For Assignment		Mixed Measures
LA0285090.1	LA0285090.1.3	Retrofit Lighting		Ready For Assignment		Mixed Measures
LA0285090.1	LA0285090.1.6	HPWH-Electrician		Ready For Assignment		Mixed Measures
LA0285090.1	LA0285090.1.4	Retrofit Refrigeration		Ready For Assignment		Mixed Measures

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Line Item Summary

	Base Desc	Actual Qty	Prop Qty	Proposed	Color Temp	Accessories
1	Storage Natural Gas Water Heater, 40 gal, UEF = 0.64	1	1	Heat Pump Water Heater, >= 45 to <= 55 gal, UEF = 3.75		• (1) Supply & install expansion tank (one tank per HPWH installed, as needed)
1		1				1

HPWH Electrical Work Order Example:

The REC Type appears as “HPWH-Electrician,” and the Line Item Summary displays electric measures related to heat pump water heaters.

Work Orders

Audit ID	Work Order ID	REC Type	Contractor Assigned	Status	Campaign	Measure Type
LA0285090.1	LA0285090.1.5	Heat Pump Water Heater		Ready For Assignment		Mixed Measures
LA0285090.1	LA0285090.1.3	Retrofit Lighting		Ready For Assignment		Mixed Measures
LA0285090.1	LA0285090.1.6	HPWH-Electrician		Ready For Assignment		Mixed Measures
LA0285090.1	LA0285090.1.4	Retrofit Refrigeration		Ready For Assignment		Mixed Measures

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Line Item Summary

	Base Desc	Actual Qty	Prop Qty	Proposed	Color Temp	Accessories
2	Heat Pump Water Heater Electrician	2	1	Heat Pump Water Heater Electrician		• (2) Supply & install subpanel (per subpanel, maximum 1 per project, as needed)
2		2				2

*Please Note: If any changes are made to one HPWH work order, they will not be automatically reflected in the other. The CSR will have to update both projects manually.*

*For example, if an additional unit is added to a HPWH Plumbing work order, the CSR will have to update the unit quantity for the HPWH - Electrical work order.*

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### 9.) Project Phase Enhancements

#### CCSR + CSR Roles: New “Show-Up Date(s)” Feature

CCSR users will find the new “Schedule Show-Up Dates” panel within the “Work Order” tab.

CCSR View:

Action	Notes	Procedures
Scope		>
Materials		>
Measure & Accessory Labor		>
Miscellaneous Labor		>
Documents		>
Status		>
Post Install Checks		>
Financial And Savings Summary		>
Customer Information		>
Schedule Show-Up Dates		∨

Clicking on the “Schedule Show-Up Dates” panel reveals the new “Show-Up Date(s)” table

Work Orders


Audit ID	Work Order ID	REC Type	Contractor Assigned	Status	Campaign	Measure Type
LA0285090.1	LA0285090.1.3	Retrofit Lighting	Accurate Energy Services, Inc	Install Scheduled		Mixed Measures


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Show Up Date	Permit Date	Notes	Created By	Created On	Updated By	Updated On
No Rows To Show						

By clicking on the green “+” users can access the “New Show-Up Date” modal, where a show up date, permit date, and any applicable notes can be recorded.

### New Show-Up Date ✕

**Show-Up Date**  

**Permit Date**  

**Notes**

By clicking on the “Save” button, the information recorded in the modal appears

in the “Show-Up Date(s)” table. Users can edit or delete information by expanding the ellipsis menu and making the appropriate selection

Show-Up Date(s) +

Show Up Date	Permit Date	Notes	Created By	Created On	Updated By	Updated On	
03/06/2026	03/06/2026	Sprint 95 Release Notes	Tera Tolentino	03/07/2026			<a href="#">Edit</a> <a href="#">Delete</a>

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When an entry is edited, the “Updated By” and “Updated On” columns will display the name of the user who made the changes and the date changes were made.

Show-Up Date(s) +

Show Up Date	Permit Date	Notes	Created By	Created On	Updated By	Updated On	
03/06/2026	03/06/2026	Sprint 95 Release Notes!	Tera Tolentino	03/07/2026	Tera Tolentino	03/07/2026	

CSR View:

The “Show-Up Date(s)” table can be found within the “Approval” panel on the left side of the “Work Order” tab.

Action	Notes	Procedures
Scope		>
LineItem History		>
Materials		>
Measure & Accessory Labor		>
Miscellaneous Labor		>
Documents		>
Status		>
Post Install Checks		>
Financial And Savings Summary		>
Customer Information		>
Approval		▼
<input checked="" type="radio"/> Approved		
Enerworks Data		>

Set Status:

Project Status:

The approved status and date are available after a valid post inspection status is selected and all post install checks are completed

Approved

mm/dd/yyyy

Close

Save

Show-Up Date(s)

Show Up Date	Permit Date	Notes	Created By	Created On	Updated By	Updated On
03/06/2026	03/06/2026	Sprint 95 Release Notes!	Tera Tolentino	03/07/2026	Tera Tolentino	03/07/2026

1 - 1 of 1

CSR users can only view the information that appears within this table. They are unable to add, edit, or delete information.

## CSR: “Approval” Section Moved to “Work Order” Tab

Previously, CSRs had to navigate to the “QAQC” tab to mark a project as “Install Approved.” However, with the deployment of Sprint 95, the “Approved” section has can now be found on the left-side of the “Work Order” Tab

The screenshot displays a software interface with a sidebar on the left and a main content area. The sidebar contains a list of menu items: Action, Notes, Procedures, Scope, Lineltem History, Materials, Measure & Accessory Labor, Miscellaneous Labor, Documents, Status, Post Install Checks, Financial And Savings Summary, Customer Information, Approval, and Enerworks Data. The 'Approval' item is highlighted with a red box and has a sub-menu with 'Approved' selected. The main content area shows a 'Work Order' tab selected, with a table of work orders. The table has columns for Audit ID, Work Order ID, REC Type, Contractor Assigned, and Status. The table contains five rows of data. Below the table, there is a 'Set Status:' dropdown menu and a 'Project Status:' section with a date input field (mm/dd/yyyy) and a 'Notes:' field. The 'Project Status:' section is also highlighted with a red box.

Audit ID	Work Order ID	REC Type	Contractor Assigned	Status
LA0285090.1	LA0285090.1.6	HPWH-Electrician	Volt's Electric	Install Assigned
LA0285090.1	LA0285090.1.3	Retrofit Lighting	Accurate Energy Services, Inc	Install Complete
LA0285090.1	LA0285090.1.5	Heat Pump Water Heater	Volt's Electric	Install Scheduled
LA0285090.1	LA0285090.1.4	Retrofit Refrigeration		Install Assigned

*Please Note: For the “Approval” date and status to be set, the “Ready for Billing” checkbox must be marked.*

## CSR: New “Ready for Billing” Checkbox

When CSR’s set a Work Order Status to “Install Complete,” they will find the new “Ready for Billing” check box. Checking the box will allow users to mark a project as “Install Approved.”

If the “Ready for Billing” box is not checked, users cannot set the “Install Approved” status

Set Status:

**Project Status:**

The approved status and date are available after a valid post inspection status is selected and all post install checks are completed

Approved

mm/dd/yyyy

The “Ready for Billing” checkbox can be found when setting the work order status to “Install Complete.”

Set Status:

**Project Status:**

- On Hold
- Material Back Order
- Material Ready
- Delayed
- Install Scheduled
- Installed - No Completion Form
- Install Complete

Post-Inspection Status:

 Is Ready For Billing

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## Release Notes

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### 10.) Program Documents Enhancements

New Supporting Program Document Type: Marketing Invoices

Add Document



File Type

CHOOSE DOCUMENT

select document type

Certified Payroll Invoice

Jobs Coordinator Invoice

Marketing Invoices

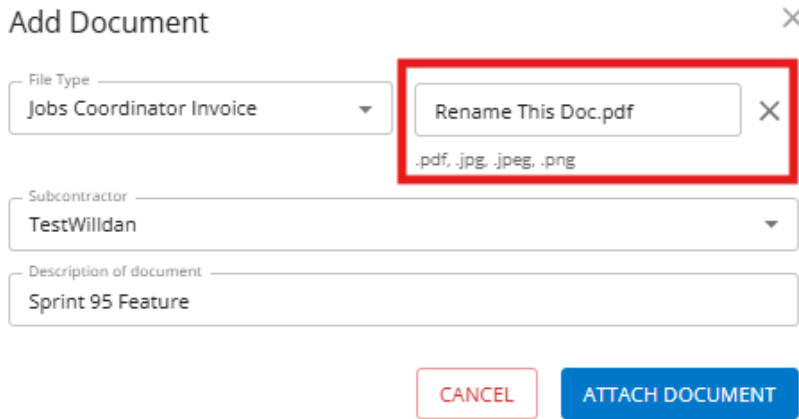
Payroll Proof of Submission

CANCEL

ATTACH DOCUMENT

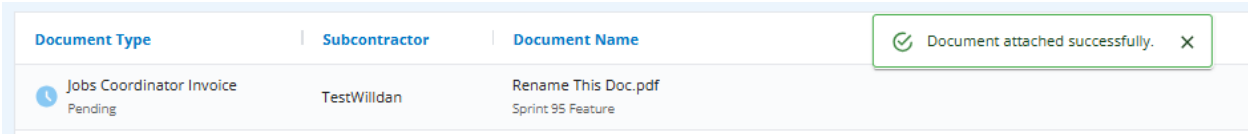
## CSR: Users can Rename Files

CSRs are able to rename Program, Audit, and Project Supporting documents by clicking in the file name field.



The screenshot shows a modal window titled "Add Document" with a close button (X) in the top right corner. It contains three input fields: "File Type" (a dropdown menu with "Jobs Coordinator Invoice" selected), "Subcontractor" (a dropdown menu with "TestWilldan" selected), and "Description of document" (a text input field with "Sprint 95 Feature" entered). A text input field for the file name, containing "Rename This Doc.pdf", is highlighted with a red rectangular border. Below this field, the text ".pdf, .jpg, .jpeg, .png" is visible. At the bottom of the form are two buttons: "CANCEL" (outlined in red) and "ATTACH DOCUMENT" (solid blue).

The new file name will be reflected within the Supporting Documents microapp.



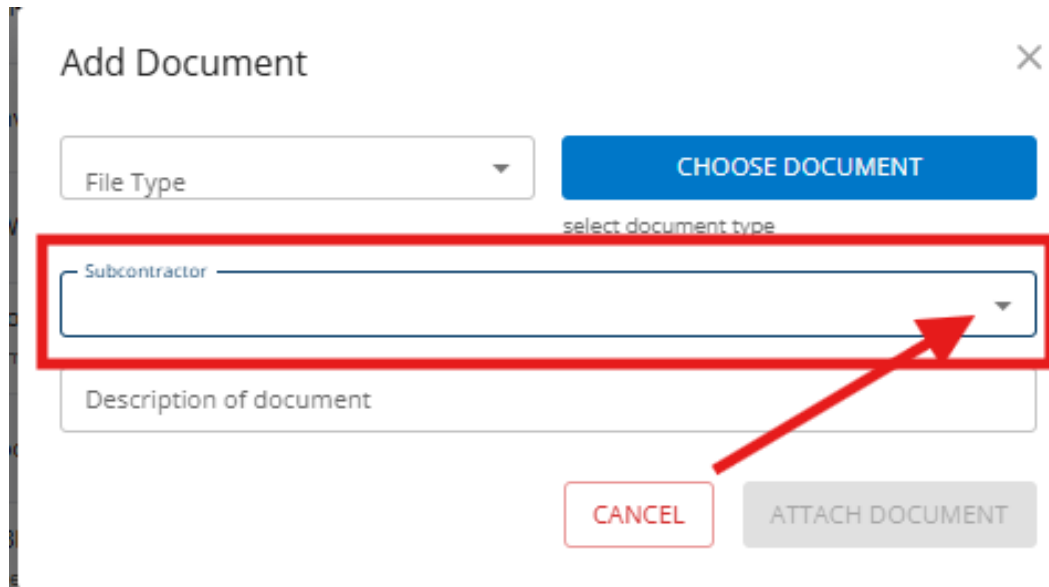
The screenshot shows a table with three columns: "Document Type", "Subcontractor", and "Document Name". The first row contains "Jobs Coordinator Invoice" (with a "Pending" status icon), "TestWilldan", and "Rename This Doc.pdf" (with "Sprint 95 Feature" as a sub-label). A green-bordered notification box in the top right corner displays a checkmark icon and the text "Document attached successfully." with a close button (X).

Document Type	Subcontractor	Document Name
Jobs Coordinator Invoice Pending	TestWilldan	Rename This Doc.pdf Sprint 95 Feature

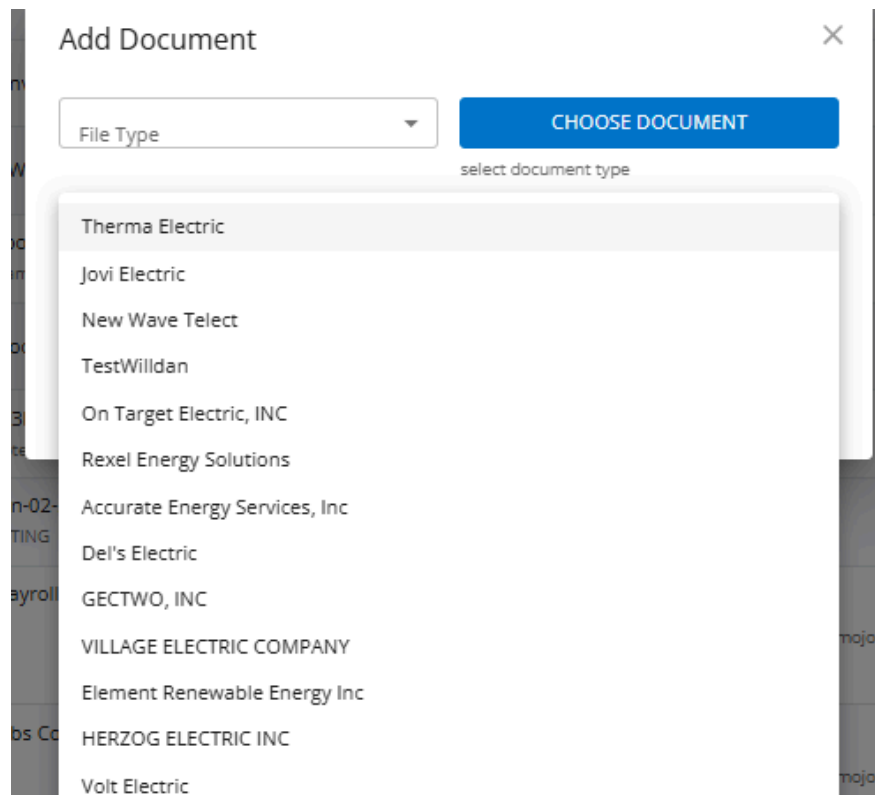
*Please Note: Deleting the file extension (eg, .pdf, .jpg, .jpeg, .png) will prevent users from renaming the file.*

## CSR: “Subcontractor” drop down list allows users to make Program Documents visible to a specified subcontractor organization

The “Add Document” modal features a new “Subcontractor” drop down list. Expand the list by clicking on the arrow. Selecting a subcontractor organization will grant them visibility to the uploaded document.



The screenshot shows the "Add Document" modal window. At the top left is the title "Add Document" and a close button (X). Below the title is a "File Type" dropdown menu with a downward arrow, and a blue button labeled "CHOOSE DOCUMENT". Below the "File Type" dropdown is the text "select document type". The "Subcontractor" dropdown menu is highlighted with a red rectangular box, and a red arrow points to its downward arrow. Below the "Subcontractor" dropdown is a text input field labeled "Description of document". At the bottom of the modal are two buttons: "CANCEL" and "ATTACH DOCUMENT".



The screenshot shows the "Add Document" modal window with the "Subcontractor" dropdown menu expanded. The list of subcontractor organizations is displayed below the dropdown arrow. The list includes:

- Therma Electric
- Jovi Electric
- New Wave Telect
- TestWilldan
- On Target Electric, INC
- Rexel Energy Solutions
- Accurate Energy Services, Inc
- Del's Electric
- GECTWO, INC
- VILLAGE ELECTRIC COMPANY
- Element Renewable Energy Inc
- HERZOG ELECTRIC INC
- Volt Electric

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### 11.) Invoicing Enhancement: HPWH Rec Type Cost Totals

When Heat Pump Water Heater installations are invoiced, they appear as a single item on the Utility Invoice builder, where Plumbing and Electric installations are bundled

Installations (1 Selected)		
Billed Sub Total: \$0.00		
Total Billed Installations and Audits: \$0.00		
Tracking Number	Project Cost	Activity
LA0285090.1	\$80,718.51	Heat Pump Water Heater

The “Audit” tab of the Utility Invoice Builder now displays a “Trade Type” column

Invoice ID:  Invoice Date:

Installations		Audits		
Billed Sub Total: \$0.00				
Total Billed Installations and Audits: \$0.00				
<input type="checkbox"/>	Subcontractor Invoice No	Trade Type	Subcontractor Invoice Approved Date	Subcontractor Name
<input type="checkbox"/>	1-0369845.1.P	Plumbing	03/05/2026	TestWilldan
<input type="checkbox"/>	1-0369843.1.LR	Lighting/Refrigeration	03/05/2026	TestWilldan
<input type="checkbox"/>	1-0369845.1.LR	Lighting/Refrigeration	03/05/2026	TestWilldan
<input type="checkbox"/>	1-0369843.1.LR	Lighting/Refrigeration	03/05/2026	TestWilldan
<input type="checkbox"/>	1-0203045.1.E	Electrical	03/05/2026	Volt Electric

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## 12.) New Terms and Conditions

New Terms and Conditions Appear on the Following Documents:

- Customer Assessment and Audit Authorization (CAAA)
- Proposed Activity Report (PAR)
- Customer Work Authorization (CWA)
- Project Completion Form (PCF)

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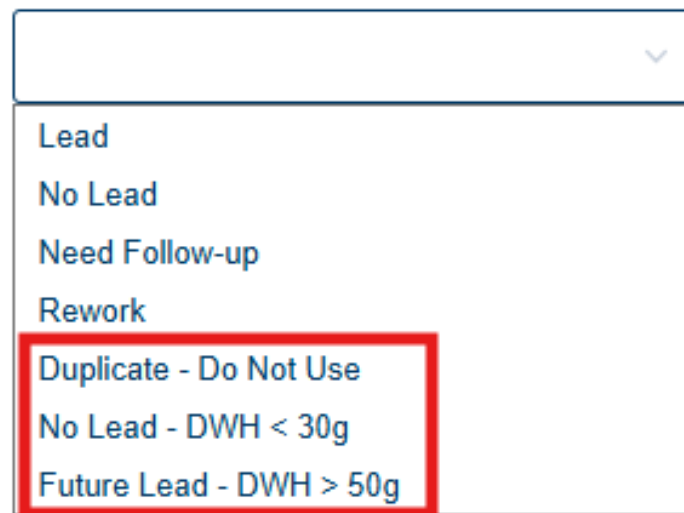
## Release Notes

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### 13.) New Prospect Statuses: “Duplicate - Do not Use,” “No Lead - DWH < 30g,” and “Future Lead - DWH > 50g”

There are 3 new Prospect Statuses:

\* Prospect Status:



Lead
No Lead
Need Follow-up
Rework
<b>Duplicate - Do Not Use</b>
<b>No Lead - DWH &lt; 30g</b>
<b>Future Lead - DWH &gt; 50g</b>

*Please Note: customers with this status are not easily identified within the Workspace or search results tables because they appear as “Unsurveyed.” This new status is only visible when users click into a customer record, then click into the assessment.*

*View from CSR “Assessments & Audits” search results table:*

<input type="checkbox"/>	Reference Number	Status
<input type="checkbox"/>	LA0316099.1	Unsurveyed

View from CSR Customer Record:

Account
Assessments

### Assessments & Audits +

Assessment ID	Audit ID	Status
LA0316099.1		Unsurveyed

Viewing the “Assessments” tab is the only place users can see this status:

Action
Notes
Procedures

Prospecting Steps

Photo C

\* Prospect Status: 03/09/2026

Assessments

Duplicate - Do not Use

Assessment Information +

*Additionally, customers with this status appear as “Unsurveyed” on the ESR dashboard.*