

SPRINT 98

Release Notes

MAY 12, 2026

Deployment & Smoke Testing
Scheduled for:

MAY 12, 2026 | 4AM - 9AM PST

Overview

- 1.) CSR + CCSR Roles: Ability to Add Schedule Dates and Notes to an Audit Prior to Auditor Assignment
- 2.) AUD Dashboard Enhancement: New “Building Sqft” Column
- 3.) CSR + ESR Roles: New “Ready for Proposal” Audit Status
- 4.) UTIL + CSR Roles: New Benefit-Cost Ratio Review Process and Workspace

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1.) CSR + CCSR Roles: Ability to Add Schedule Dates and Notes to an Audit

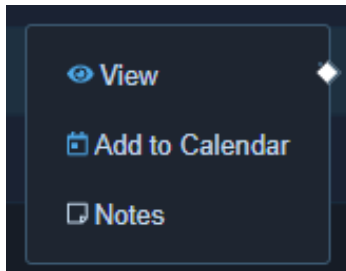
Once a subcontractor organization accepts an audit assignment, the CSR and CCSR roles are now able to add schedule dates and notes to that job. Users can enter this information even if an auditor has not been assigned by the CCSR.

How to Add Schedule Dates and Notes to an Audit as a CSR or CCSR:

1.) Once the CCSR accepts the assigned auditing job, navigate to the Workspace | Audits, and click on the “Accepted” queue.



2.) Pull up the record that needs schedule dates and/or notes added, expand the ellipsis menu, and select either “Add to Calendar” or “Notes”



3A.) Selecting “Add to Calendar” will bring up the scheduling modal. Fill out the date, time, and optional notes field with any relevant information you’d like to share with the subcontractor.

A "Add to Calendar" modal form. At the top, it says "Add to Calendar" with a close button (X). Below that is a calendar icon and the text "Add to Calendar". The form contains the following fields:

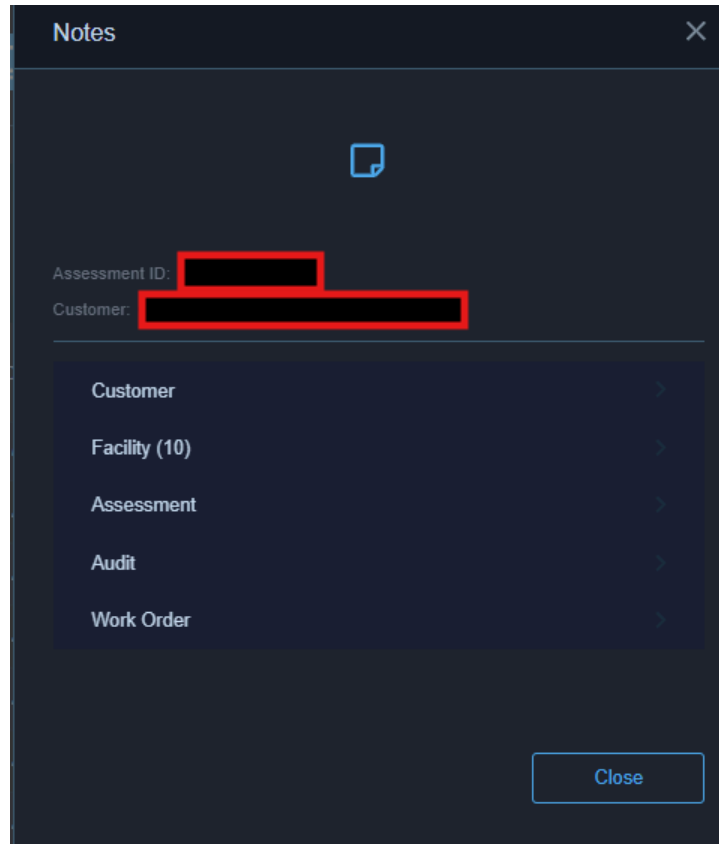
- * Schedule Date: A text input field containing "05/07/2026" with a calendar icon on the right.
- * Start Time: A time selection field containing "03:29 PM" with a clock icon on the right.
- * End Time: A time selection field containing "03:29 PM" with a clock icon on the right.
- Note: A large text area for entering notes.

At the bottom, there are two buttons: "Close" and "Save".

Once you click on “Save” the record will then move to the “Scheduled” queue within the Audits section of the workspace.



3B.) Selecting “Notes” will bring up a modal that allows users to add or check Customer, Facility, Assessment, Audit, and Work Order Level Notes.



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2.) AUD Dashboard Enhancement: New “Building Sqft” Column

A new column that displays the building square footage entered during the assessment can be found in the auditor dashboard.

Max Meter kW	# of Meters	Building Sqft	Scheduled Date	Campaign Name
204.8	1	15,000	05/11/2026	⋮

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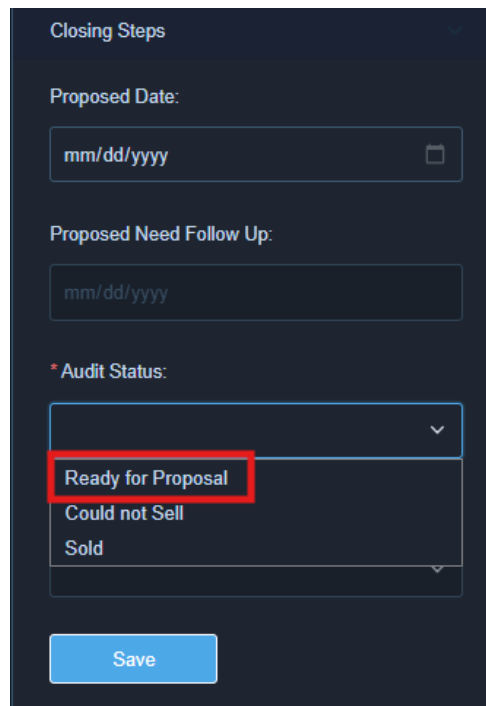
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3.) CSR + ESR Roles: New “Ready for Proposal” Audit Status

With the introduction of new measures and the audit merging process, ESRs wait to propose an audit until it has undergone thorough internal review. The introduction of the new “Ready for Proposal” audit status allows CSRs to clearly communicate to ESRs that the audit has passed all reviews and can be shared with the customer.

When viewing a submitted Audit Summary, CSRs can find this new status under Closing Steps | “Audit Status” Drop Down List



The screenshot displays a dark-themed form titled "Closing Steps". It contains three input fields: "Proposed Date:" with a date picker icon, "Proposed Need Follow Up:" with a date input field, and "* Audit Status:" with a dropdown menu. The dropdown menu is open, showing three options: "Ready for Proposal" (highlighted with a red box), "Could not Sell", and "Sold". A "Save" button is located at the bottom of the form.

Until a CSR sets the “Ready for Proposal” status, an ESR will not be able to enter information in the “Proposed Date” or “Proposed Need Follow Up” fields. The “Audit Status” drop down list will be disabled, and ESR users will not be able to generate audit documents.

Once a CSR sets the “Ready for Proposal” status, the record will appear under the new “Ready for Proposal” tab that has been added to the ESR dashboard.

Priority	Prospects	Leads
All Assignments	Audits	Proposals
Ready for Proposal		

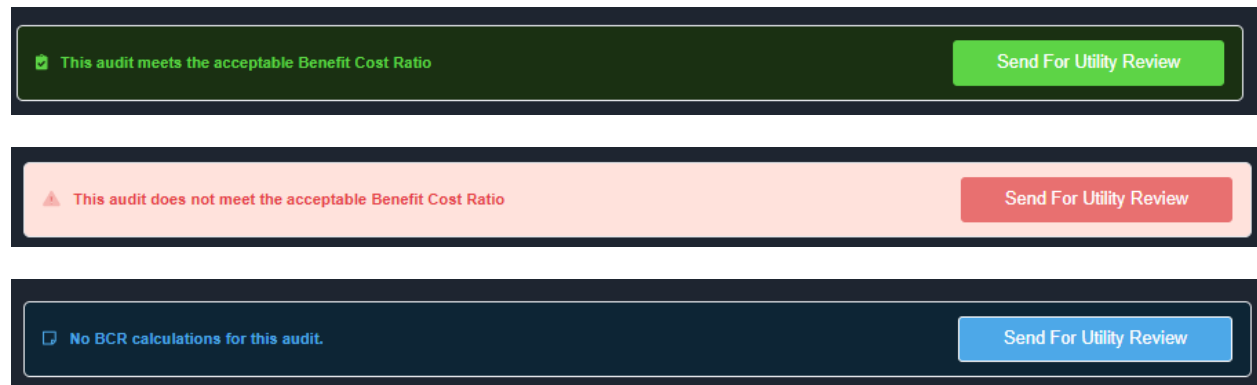
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4.) UTIL + CSR Roles: New Benefit-Cost Ratio Review Process and Workspace

Once an audit has been submitted the CSR will see a green, red, or blue BCR banner at the top of the Audit Summary page.

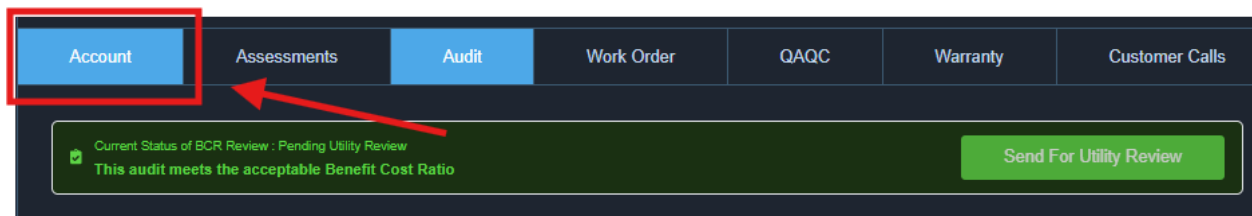


The image shows three examples of BCR banners:

- Green banner:** "This audit meets the acceptable Benefit Cost Ratio" with a green checkmark icon and a green "Send For Utility Review" button.
- Red banner:** "This audit does not meet the acceptable Benefit Cost Ratio" with a red warning triangle icon and a red "Send For Utility Review" button.
- Blue banner:** "No BCR calculations for this audit." with a blue checkmark icon and a blue "Send For Utility Review" button.

By clicking on the “Send For Utility Review” button, the CSR can initiate a Utility BCR Review.

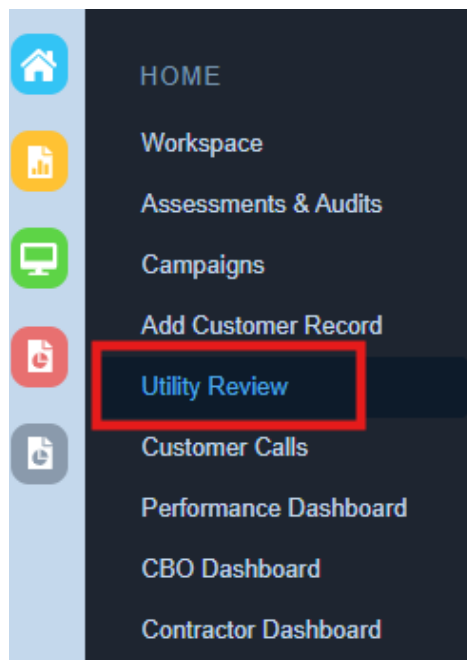
To cancel a review, the CSR can click on the “Account” tab, locate the BCR Review section on the left, and click on “Cancel Review”



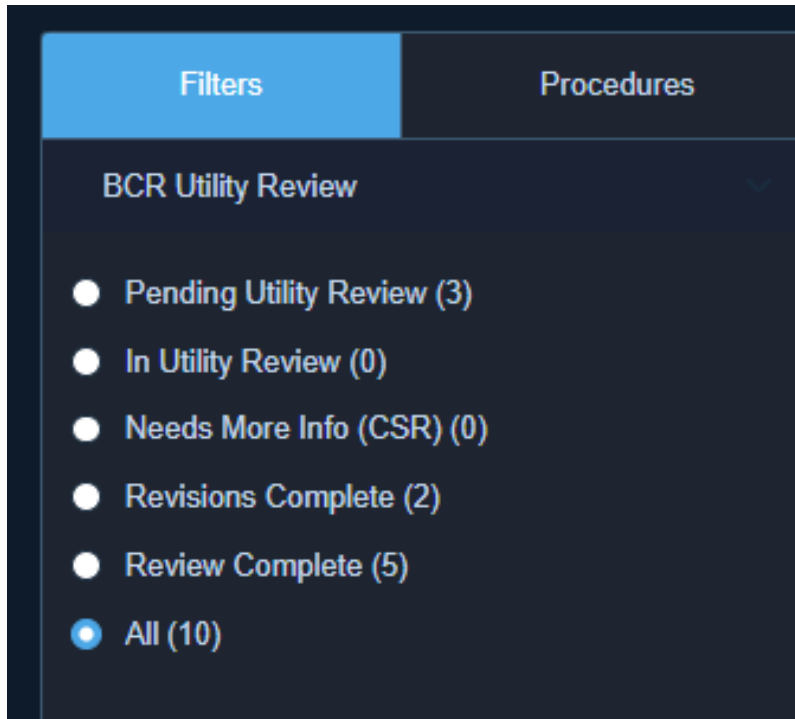
The image shows a screenshot of the workspace with the "Account" tab selected and highlighted by a red box. A red arrow points from the "Account" tab to the BCR Review section. The BCR Review section shows a green banner with the text "Current Status of BCR Review : Pending Utility Review" and "This audit meets the acceptable Benefit Cost Ratio" with a green checkmark icon, and a green "Send For Utility Review" button.



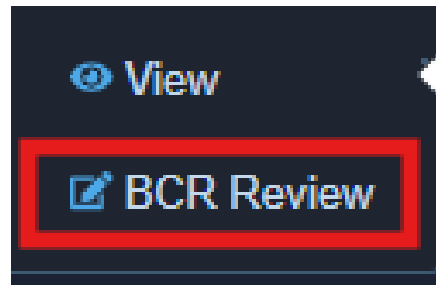
A new “Utility Review” workspace has been created for CSR and UTIL role users who want to quickly access audits undergoing a BCR review. This workspace can be accessed by clicking on the “Home” icon and selecting “Utility Review”



The Utility Review Workspace allows users to filter records by their review status.



When viewing the records within a selected status, expand the ellipsis menu and click on “BCR Review” to access the “BCR Utility Review” modal.



BCR Utility Review - Fuel Substitution

PROGRAM IMPACT

Current BCR	With This Project
2.20	2.20
1,323,253.34 ABS kWh savings	1,325,255.40 ABS kWh savings

PROJECT DETAIL

B/C Ratio	BCR Weighted Energy Savings	Annual Bill Impact
1.84	3,676.73 kWh	\$216.00

MEASURES

Measure	Building Type	Location	Benefit Cost Ratio	kWh Savings
Strip with (2) 8 ft 24 Watt T8 LED Single Pin Lamp(s) with Reduced Power HE Electronic Ballast(s)	Office - Large	Floor:Floor 1 Room:Social Hall Stage	1.78	247.50
Strip (2) 4 ft 15 Watt T8 LED BiPin Lamp(s) Type C with Dimming Driver(s)	Office - Large	Floor:Floor 1 Room:Kitchen	0.80	70.66
LTE 70W LED Pole Top Arch Fixture	Office - Large	Floor:Exterior Room:Exterior Back	1.89	1,683.90

BCR Utility Review

REVIEW STATUS: Pending Utility Review

REVIEW PROGRESS

- Pending Utility Review
- In Utility Review
- Needs More Info (CSR)
- Revisions Complete
- Review Complete

Advance Review

→ In Utility Review

Mark Review as
Pick up for review first.

Add Note

Enter a note...

Add Note

Activity History

- Tera.Tolentino@Wildan.com (CSR) - 05/07/2026
- Changed to: Pending Utility Review

The “BCR Utility Review” modal features Program Impact, Project Detail, and Measure information.

On the right side of the “BCR Utility Review” modal, users can set the review status by clicking on the status shown within the “Advance Review” section.

BCR Utility Review

REVIEW STATUS: Pending Utility Review

REVIEW PROGRESS

- Pending Utility Review
- In Utility Review
- Needs More Info (CSR)
- Revisions Complete
- Review Complete

Advance Review

→ In Utility Review

Users are also able to enter any relevant notes within the “Notes” field and share them by clicking on the “Add Note” button

The screenshot displays the 'BCR Utility Review' interface. At the top, the title 'BCR Utility Review' is shown. Below it, the 'REVIEW STATUS' is 'Pending Utility Review'. A 'REVIEW PROGRESS' section contains a vertical list of steps: 'Pending Utility Review', 'In Utility Review', 'Needs More Info (CSR)', 'Revisions Complete', and 'Review Complete'. Below the progress list are three buttons: 'Advance Review' (with a sub-button '→ In Utility Review'), 'Mark Review as' (with a sub-button 'Pick up for review first'), and 'Add Note'. The 'Add Note' section is highlighted with a red border and contains a text input field with the placeholder 'Enter BCR notes here' and an 'Add Note' button.

Beneath the notes field is the “Activity History” section that shows when all status changes were made and when notes were entered.

Add Note

Activity History

- Tera.Tolentino@Willdan.com (CSR) · 05/07/2026
Changed to **Pending Utility Review**
- Tera.Tolentino@Willdan.com (CSR) · 05/07/2026
- Tera.Tolentino@Willdan.com (CSR) · 05/07/2026
Changed from **Pending Utility Review** to **In Utility Review**
- Tera.Tolentino@Willdan.com (CSR) · 05/07/2026
Changed from **In Utility Review** to **Needs More Info (CSR)**
- Tera.Tolentino@Willdan.com (CSR) · 05/07/2026
Changed from **Needs More Info (CSR)** to **Revisions Complete**

Users are able to mark the BCR review as “Accepted” or Rejected” when the project is in the “In Utility Review” or “Revisions Complete” status.

BCR Utility Review

REVIEW STATUS **In Utility Review**

REVIEW PROGRESS

- Pending Utility Review
- In Utility Review
- Needs More Info (CSR)
- Revisions Complete
- Review Complete

Advance Review

→ Needs More Info (CSR)

Mark Review as

✓ Approved

✗ Rejected

Auto-completes the review.

BCR Utility Review

REVIEW STATUS **Revisions Complete**

REVIEW PROGRESS

- Pending Utility Review
- In Utility Review
- Needs More Info (CSR)
- Revisions Complete
- Review Complete

Advance Review

→ In Utility Review

Mark Review as

✓ Approved

✗ Rejected

Auto-completes the review.