

SPRINT 99

Release Notes

JUNE 16, 2026

Deployment & Smoke Testing
Scheduled for:

JUNE 16, 2026 | 4AM - 9AM PST

Overview

- 1.) UTIL, CSR, CCSR Roles: Updated Workspace View and Functionalities
- 2.) Measure Type Enhancement: “Mixed Measures” Renamed to “Bundle”
- 3.) CSR Role: Qualified Queue Enhancement – If a record has an assessment with an uploaded CAAA, all "Qualified" assessments for that record appear in the Qualified Queue.
- 4.) New “Pending Update” and “Pending Review” Audit Statuses
- 5.) CSR + UTIL Roles: Updated BCR Page Display
- 6.) UTIL, CSR, and ESR Roles: New Summary Display for Audits and Work Orders
- 7.) CSR Role: New Audit Merging Logic
- 8.) CSR Role: New Feature to Regenerate Work Order Documents in Bulk
- 9.) FIN Role: Users Can Remove Projects From Billing Batches
- 10.) ESR, AUD, CSR Roles: Updated HPWH ESR + Plumber Survey Logic

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1.) UTIL, CSR, CCSR Roles: Updated Workspace View and Functionalities

The new Workspace displays project phases along the top of the screen. Select a phase to view its associated status filters and projects.

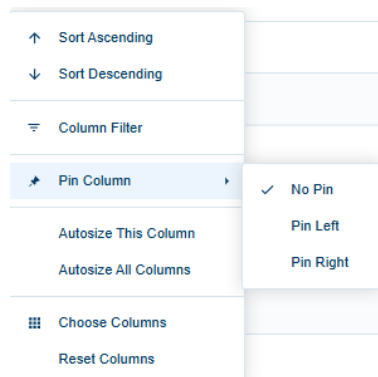
New View:



A "Quick Search" field above the table allows users to search across all displayed results, including partial searches



Expanding the ellipsis menu next to each column header offers options that allows users to customize how they view the displayed results



From the column header ellipsis menu, users can click on “Choose Columns” to display which columns they would like to view within the results table.

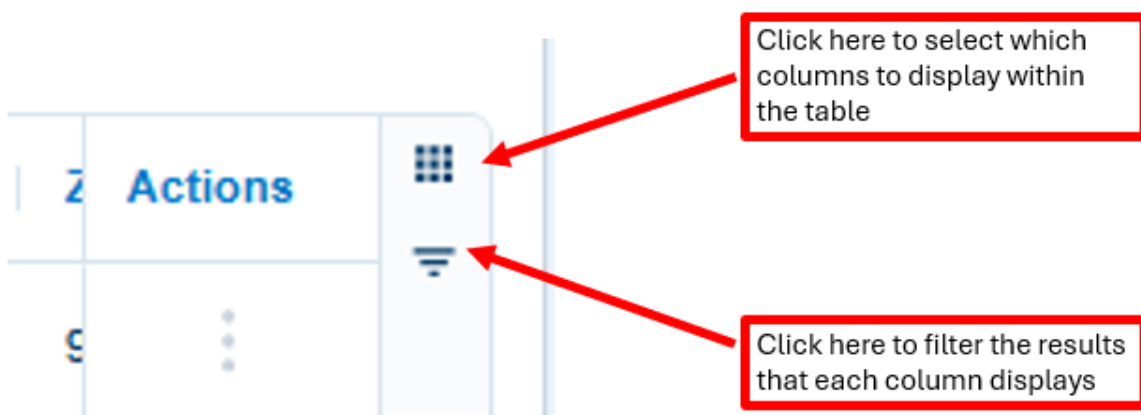
Unchecking a box will hide the column while checking it will display the column.

Choose Columns

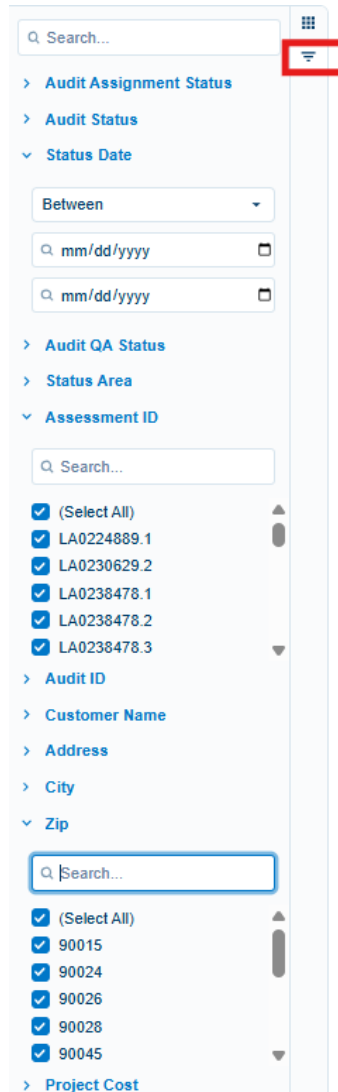
☒ Search...

- ☒ = Status
- ☒ = Status Date
- ☒ = Status Area
- ☒ = Assigned Date
- ☒ = Work Order ID
- ☒ = REC Type
- ☒ = Customer Name
- ☒ = Address
- ☒ = City
- ☒ = Zip
- ☒ = Project Cost
- ☒ = Labor Value
- ☒ = Install Company
- ☒ = kW Savings
- ☒ = Water Savings
- ☒ = Outdated PO
- ☒ = Campaign
- ☒ = Install Scheduled Date
- ☒ = Install Complete Date
- ☒ = ESR
- ☒ = Measure Type

On the far right of each table, click on the grid and filter icons to access panels where the display table results can be customized based on user preference.



Filter panel:



The image shows a vertical filter panel on the right side of a software interface. At the top, there is a search bar labeled "Search...". Below it, a red rectangular box highlights a small icon representing a column filter. The panel contains several expandable sections: "Audit Assignment Status", "Audit Status", "Status Date", "Audit QA Status", "Status Area", "Assessment ID", "Audit ID", "Customer Name", "Address", "City", "Zip", and "Project Cost". The "Status Date" section is expanded, showing a "Between" dropdown and two date input fields with the placeholder "mm/dd/yyyy". The "Assessment ID" section is also expanded, showing a search bar and a list of items with checkboxes: "(Select All)", "LA0224889.1", "LA0230629.2", "LA0238478.1", "LA0238478.2", and "LA0238478.3". The "Zip" section is expanded, showing a search bar and a list of items with checkboxes: "(Select All)", "90015", "90024", "90026", "90028", and "90045".

Please note, when viewing a column that displays a date, such as “Status Date,” clicking on “Column Filter” will prompt users to enter a date and time. If the exact time a status was set is not entered, the filter will not yield results. **Until the time fields are removed, please refrain from using this date filtering method and use the left side filtering options instead.**

Status Date	Audit QA Status	As
04/15/2026	↑ Sort Ascending	
	↓ Sort Descending	
05/01/2026	Column Filter	
05/01/2026	Pin Column	
05/01/2026	Autosize This Column	
05/01/2026	Autosize All Columns	
05/01/2026	Choose Columns	
05/01/2026	Reset Columns	

Status Date	Account Number	Customer Name
05/21/2026		SASAKI & SONS INC
06/04/2026		
05/11/2026		
05/01/2026		
05/01/2026		
05/01/2026		
06/10/2026		

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2.) Measure Type Enhancement: “Mixed Measures” Renamed to “Bundle”

For ESRs + CSRs making an Assessment | Measure Type selection, users will find that “Mixed Measures” has been renamed to “Bundle”

The screenshot displays a web form with several fields. At the top, a dropdown menu is set to 'Assessment'. Below it, the 'Prospect Status' is '06/15/2026' and the 'Lead' dropdown is set to 'Lead'. The 'Prospect Status Reason' is 'Moving to Assessment' and the 'Prospect Source' is 'ESR Walk-In'. The 'Measure Type' dropdown is open, showing a list of options: 'Bundle', 'ASH-C Only', 'Motors-Only', 'Lighting/Refrigeration', 'Refrigeration Combined', 'HPWH-Gas(Plumbing)', 'HPWH-Gas(Electrician)', 'HPWH-Electric(Plumbing)', 'HPWH-Electric(Electrician)', and 'Bundle' at the bottom. The bottom 'Bundle' option is highlighted with a blue background and a red border.

Assessment

* Prospect Status: 06/15/2026

Lead

* Prospect Status Reason: Moving to Assessment

* Prospect Source: ESR Walk-In

* Measure Type:

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

When viewing tables that display a “Measure Type” column, all instances of “Mixed Measures” will now appear as “Bundle”

Measure Type
Bundle
Bundle
Lighting/Refrigeration
HPWH-Gas(Plumbi...
HPWH-Gas(Electri...
Bundle
HPWH-Gas(Plumbi...

All three records appear within the Qualified Queue because

- 1 – They all have the “Qualified” status
- 2 – One of these records has a signed CAAA uploaded

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4.) New “Pending Update” and “Pending Review” Audit Statuses

There are two new Closing Steps | Audit Statuses “Pending Update” and “Pending Review”

The screenshot displays a web form with two main sections highlighted by red boxes. The top section, titled 'Closing Steps', contains two date input fields: 'Proposed Date:' and 'Proposed Need Follow Up:', both with a placeholder 'mm/dd/yyyy' and a calendar icon. The bottom section, titled '* Audit Status:', features a dropdown menu. The dropdown is open, showing a list of audit statuses: 'Pending Update', 'Pending Review', 'Ready for Proposal', 'Could not Sell', and 'Sold'. The first two options, 'Pending Update' and 'Pending Review', are highlighted with a red box. A blue 'Save' button is located at the bottom of the form.

Closing Steps

Proposed Date:

mm/dd/yyyy

Proposed Need Follow Up:

mm/dd/yyyy

* Audit Status:

Pending Update

Pending Review

Ready for Proposal

Could not Sell

Sold

Save

When reviewing an audit, CSRs can set the “Pending Update” if the subcontractor needs to make changes to an audit.

For auditors, the project will appear in the “Pending Update” section of their dashboard

Ready To Audit	Scheduled	In Progress	Submitted
Pending Update	Pending Review	Merged	Ready for Proposal

After making any changes to the audit, the auditor should access the Line Item Summary and click on the “Update” button

Line Item Summary

Quick Search Results...

Floor	Room	Ref	Fixture Hgt	Base Qty	Base Desc	Prop Qty	Actions
Basement	Storage	15662	12	2	EXIT Incandescent (2) 10W lamp	2	
Basement	Hallway	15663	12	4	4 ft Recessed Lensed Troffer with (1) 4 ft 34 Watt T12 Fluorescent BiPin Lamp with 1 Standard Magnetic Ballast	4	
Floor 1	Lobby	15653	12	12	4 ft Recessed Parabolic Troffer with (1) 4 ft 40 Watt T12 Fluorescent BiPin Lamp with 1 Energy Saving Magnetic Ballast	12	
Floor 1	Lobby	15654	12	1	(1) 5 ft 75 Watt T12 Fluorescent HO (RDC) Lamp(s) with Electronic Ballast(s)	1	
				19		19	

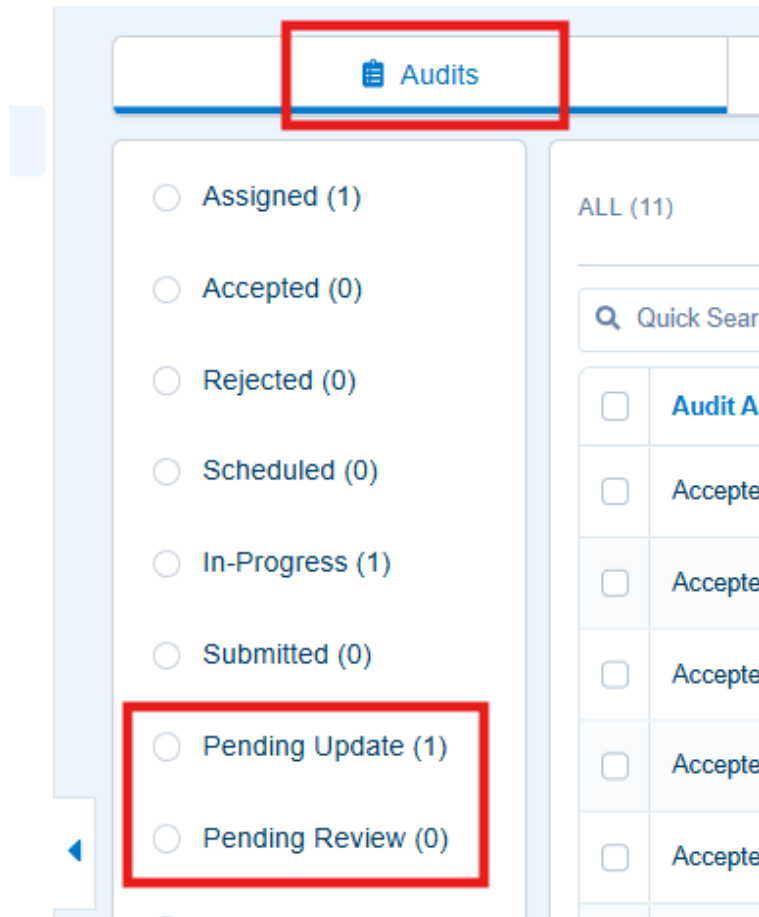
1 - 4 of 4

Close Update

Upon clicking the “Update” button, the audit status will change to “Pending Review” and appear in the “Pending Review” section of the auditor dashboard

Ready To Audit	Scheduled	In Progress	Submitted
Pending Update	Pending Review	Merged	Ready for Proposal

In the Workspace | Audit section, CSRs and CCSRs can use the “Pending Review” and “Pending Update” filters to track audits as they go through the review and updating process



Once a CSR reviews and approves of the updated audit, they can proceed with setting the “Ready for Proposal” status. If needed, they can revert back to “Pending Review” or “Pending Update”

Please note, for ESRs, projects with the “Pending Review” or “Pending Update” statuses will only appear in the “All Assignments” section of their dashboard.

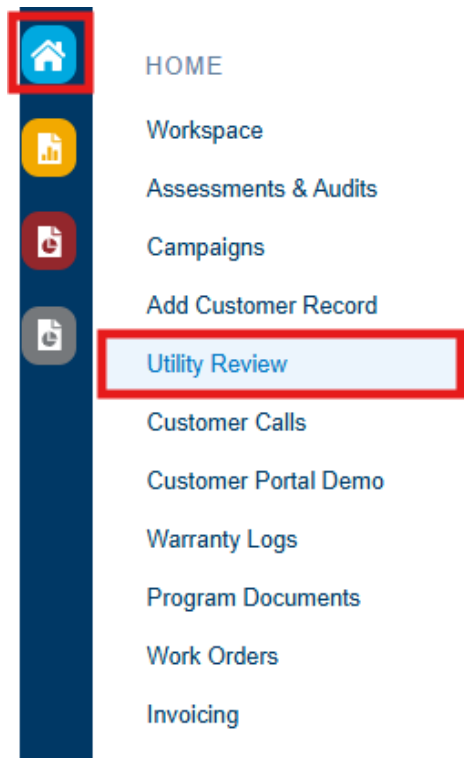
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5.) CSR + UTIL Roles: Updated BCR Page Display

The Benefit Cost Ratio (BCR) Display Page is accessed by clicking on the “Home” icon and selecting “Utility Review”



When viewing records within the Utility Review table, users will find a new columns that display: ABS kWh Savings, Max Meter kW, Number of Meters, Measure Type, Building Type, and Benefit Cost Ratio

When users expand a record's ellipsis menu and click on “BCR Review” they will

find the new BCR Review Page that features detailed information about the audit line items and how they contribute to the BCR.

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6.) UTIL, CSR, and ESR Roles: New Summary Display for Audits and Work Orders

Audit Summary View: Users will now find financial information organized in three new tabs: Total Cost, Energy Efficiency Savings, and HPWH Measures Savings

Total Cost	Energy Efficiency Savings	HPWH Measures Savings
Energy Efficiency Project Cost \$2,293.33	HPWH Project Cost (Gas) \$19,696.15	Total Cost \$21,989.48
		Estimated Utility Bill Impact \$1,101.12

Work Order View: When viewing a work order, click on the “Financial And Savings Summary” panel to find this information organized in three new tabs: Total Cost, Energy Efficiency Savings, and HPWH Measures Savings

Action	Notes	Procedures
Scope		
LineItem History		
Materials		
Measure & Accessory Labor		
Miscellaneous Labor		
Documents		
Status		
Post Install Checks		
Financial And Savings Summary		
Financial and Savings Summary		
Customer Information		

Photo Capture

AccountAssessmentsAuditWork OrderQAQCWarranty

Facility Audits

Quick Search Results...

Audit IDDate CommittedWork Order CountAll Work Orders Approved

LA0311175.106/11/20264

1 - 1 of 1

Total CostEnergy Efficiency SavingsHPWH Measures Savings

Energy Efficiency Project Cost\$2,293.33HPWH Project Cost (Gas)\$19,696.15Total Cost\$21,989.48Estimated Utility Bill Impact\$1,101.12

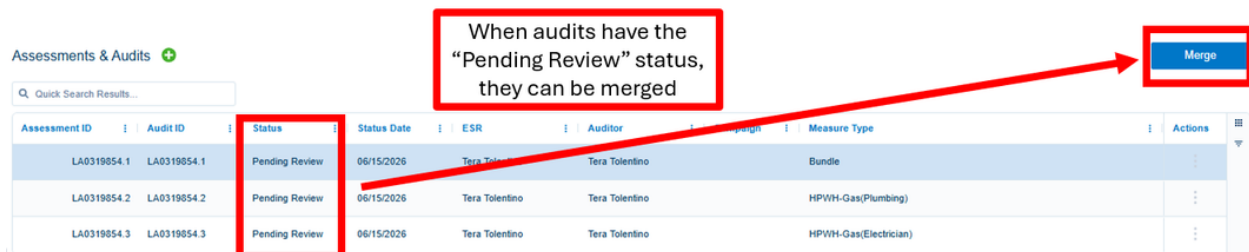
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7.) CSR Role: New Audit Merging Logic

With the deployment of Sprint 99, the CSR will only be able to merge audits when they are in the “Pending Review” status.



When audits have the “Pending Review” status, they can be merged

Assessment ID	Audit ID	Status	Status Date	ESR	Auditor	Measure Type	Actions
LA0319854.1	LA0319854.1	Pending Review	06/15/2026	Tera Tolentino	Tera Tolentino	Bundle	...
LA0319854.2	LA0319854.2	Pending Review	06/15/2026	Tera Tolentino	Tera Tolentino	HPWH-Gas(Plumbing)	...
LA0319854.3	LA0319854.3	Pending Review	06/15/2026	Tera Tolentino	Tera Tolentino	HPWH-Gas(Electrician)	...

The current merge logic of this sprint is as follows:

- The system will only merge audits that are in Pending Review status.
- A merge will only trigger when 2 or more audits at the facility are in Pending Review status.

For example: If a facility has 5 audits and only 2 are in Pending Review, only those 2 will be merged — the remaining 3 are unaffected.

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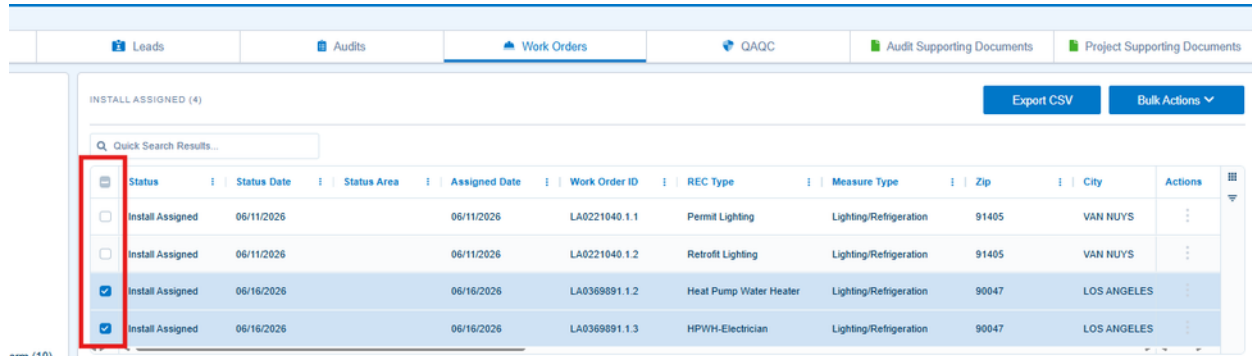
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8.) CSR Role: New Feature to Regenerate Work Order Documents in Bulk

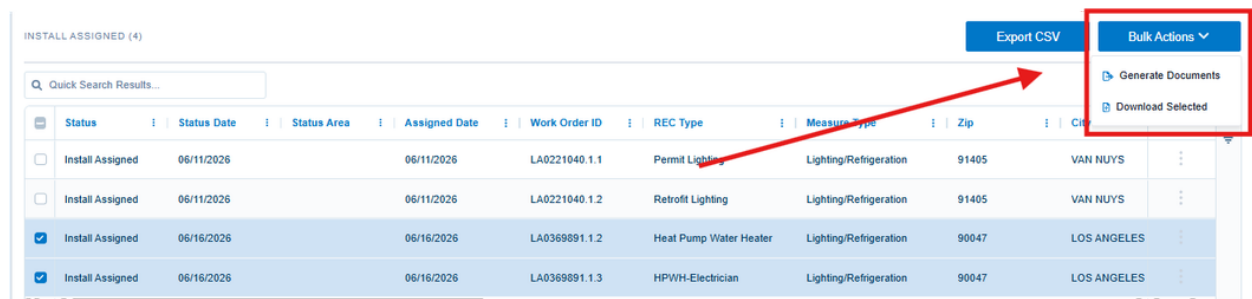
Within the “Work Order” section of the Workspace, users can bulk regenerate documents for projects that have been assigned to a subcontractor.

1.) Select projects using the check boxes on the right



Status	Status Date	Status Area	Assigned Date	Work Order ID	REC Type	Measure Type	Zip	City	Actions
☐	Install Assigned	06/11/2026	06/11/2026	LA0221040.1.1	Permit Lighting	Lighting/Refrigeration	91405	VAN NUYS	...
☐	Install Assigned	06/11/2026	06/11/2026	LA0221040.1.2	Retrofit Lighting	Lighting/Refrigeration	91405	VAN NUYS	...
☒	Install Assigned	06/16/2026	06/16/2026	LA0369891.1.2	Heat Pump Water Heater	Lighting/Refrigeration	90047	LOS ANGELES	...
☒	Install Assigned	06/16/2026	06/16/2026	LA0369891.1.3	HPWH-Electrician	Lighting/Refrigeration	90047	LOS ANGELES	...

2.) Click on the “Bulk Actions” button and select “Generate Documents”



Status	Status Date	Status Area	Assigned Date	Work Order ID	REC Type	Measure Type	Zip	City	Actions
☐	Install Assigned	06/11/2026	06/11/2026	LA0221040.1.1	Permit Lighting	Lighting/Refrigeration	91405	VAN NUYS	...
☐	Install Assigned	06/11/2026	06/11/2026	LA0221040.1.2	Retrofit Lighting	Lighting/Refrigeration	91405	VAN NUYS	...
☒	Install Assigned	06/16/2026	06/16/2026	LA0369891.1.2	Heat Pump Water Heater	Lighting/Refrigeration	90047	LOS ANGELES	...
☒	Install Assigned	06/16/2026	06/16/2026	LA0369891.1.3	HPWH-Electrician	Lighting/Refrigeration	90047	LOS ANGELES	...

3.) Select which documents to regenerate by clicking on the check boxes, then

click on “Generate”

Generate Documents

×

Select the documents to generate for the selected records.

☒ ☐

☐ Scope of Work

☐ Labor Purchase Order

☐ Material Purchase Order

☐ Material Pick List

☐ Project Completion Form

☐ Updated PAR

Cancel

Generate

4.) The “Document Generation Queue” modal will appear. Once the documents have finished regenerating, “All documents complete” will appear in green

Document Regeneration in Progress:

Generate Documents

×

Document Generation Queue

11 of 11 remaining

Generated 11 documents for 2 records.

LA0369891.1.3_Scope of Work	✓
LA0369891.1.3_Material Purchase Order_4	✓
LA0369891.1.3_Material Credit Order_4	✓
LA0369891.1.3_Material Credit Order_4	✓
LA0369891.1.2_Scope of Work	✓
LA0369891.1.2_Material Purchase Order_4	✓
LA0369891.1.2_Material Purchase Order_5	✓
LA0369891.1.2_Material Credit Order_4	✓
LA0369891.1.2_Material Credit Order_5	✓

Document Regeneration Complete:

Generate Documents

X

Document Generation Queue

All documents complete

Generated 11 documents for 2 records.

LA0369891.1.3_Scope of Work	Ready
LA0369891.1.3_Material Purchase Order_4	Ready
LA0369891.1.3_Material Credit Order_4	Ready
LA0369891.1.3_Material Credit Order_4	Ready
LA0369891.1.2_Scope of Work	Ready
LA0369891.1.2_Material Purchase Order_4	Ready
LA0369891.1.2_Material Purchase Order_5	Ready
LA0369891.1.2_Material Credit Order_4	Ready
LA0369891.1.2_Material Credit Order_5	Ready

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9.) FIN Role: Users Can Remove Projects From Billing Batches

To remove a project from a created batch, uncheck the box next to the project and click on the “Update Batch” button. Once a project is removed from a batch, the Billed Sub Total and Total Billed Installations and Audit values will update

Removing projects from a batch will update these values

The screenshot displays the 'Invoice Billing' interface. At the top, there are filters for 'Filter by Date Range' (with a 'Select Range' dropdown) and 'Select Existing Batch ID' (with a search bar containing 'JUNE16TEST'). A red box highlights the 'Update Batch' button. Below these are fields for 'Invoice ID' (JUNE16TEST), 'Invoice Date' (06/16/2026), and 'Billed Date' (mm/dd/yyyy). A table below shows 'Installations' and 'Audits (1 Selected)'. The 'Billed Sub Total' is \$450.46, and the 'Total Billed Installations and Audits' is also \$450.46. A red box points to the 'Billed Sub Total' and 'Total Billed Installations and Audits' values. At the bottom, a table lists projects. The first row is selected, and a red box highlights the checkbox next to it. A red arrow points from the text 'Uncheck this box, then click on "Update Batch" to remove projects from a billing batch' to the checkbox. The table has columns: Subcontractor Invoice ID, Subcontractor Invoice Approved Date, Audit ID, and Audit Time Log Status.

Subcontractor Invoice ID	Subcontractor Invoice Approved Date	Audit ID	Audit Time Log Status
1-0369890.3.E	06/16/2026	LA0369890.3	Subcontractor Invoice Approved
1-0369890.2.P	06/16/2026	LA0369890.2	Subcontractor Invoice Approved

Uncheck this box, then click on “Update Batch” to remove projects from a billing batch

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10.) ESR, AUD, CSR Roles: Updated HPWH ESR + Plumber Survey Logic

Update #1: Fixtures in the Fixture Survey portion will only appear based on the ASHRAE Building Type

Update #2: Users will no longer be able to enter negative numeric values into the Fixture Survey fields