

Navigator® customer portal

Navigator Release Notes

Release Date: April 15, 2019

The following remedies and enhancements are included in the Navigator release dated April 15, 2019. This document is provided as a summary resource to improve your user experience with the *Navigator*® customer portal and the applications contained within the platform.

If, after reviewing this document, you have questions about anything contained within this release, contact the *Navigator* support team at navigatorsupport@hvacnavigator.com or call 844-319-0726.

Order Navigator

What's New?

- DS Storefront – Mass upload now accepts .XLSX files, in addition to .CSV files
- All – Implemented system performance improvements to reduce page load time across the platform
- All – Labels for links have been updated for clarification
- Chiller Storefront – Product Details Page now shows Lead Time and Available Qty
- Controls Storefront – Update to the quote disclaimer
- DS Storefront – Templates have been updated to store the desired Brand, Requested Delivery Date, and Ship Method
- DS Storefront – Templates now allow for Mass Change and Mass Delete
- DS Storefront – Templates show branded images
- Notification Center – Added ability to send targeted eMails to Navigator users

Fixes

- All Storefronts – Text showing over images
 - Solution: Improvements made to arrange text into proper locations
- All Storefronts – When clicking on images in templates, user is not being taken to the product details page
 - Solution: Resolved issue.
- DS Storefront – User is not allowed to change certain line items in Change Order screen
 - Solution: Added message to notify the user why changes cannot be made to certain line items

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Selection Navigator

What's New?

Selection Navigator Platform

- New document creation status button for viewing documents requested for creation that have not yet completed.
- When there is a difference between the currency being displayed and the currency associated with the saved estimate, you can now view the currency exchange rate.
- Orders can now support larger number of items on each order.

Air Distribution Products

- Improvements to PennBarry fan selection.
- New Filter by Criteria method of adding a product allows the user to narrow the product list by selection criteria such as specific options and accessories or sizes.
- Users can print the PennBarry energy usage tab information to PDF for review.
- Documents printed will display products in the same order as listed in the Air Systems product grid.
- PennBarry orders can be submitted to the appropriate ERP system.
- When items are loaded into the Orders Grid, the total cost price will be listed for released items.
- Ordering version information is now passed along with orders to provide additional details for order processing and support.
- System will validate that items in an order have valid freight quotes when required.
- Now able to add job level freight to quotes line items. When viewing prices for PennBarry products that do not require a freight quote, a calculated freight price will be displayed. When a fan product has been added with a custom freight quote and the item is then added, the freight percent will be reset, requiring the totals to be recalculated.
- Multipliers are recalculated at release time based on products in the current release.
- Order XML file will include unit size.
- When products are added from schedule with different brands, they will appear in own brand group.
- Added order line number to orders.
- When a user enters markups on products that have been priced, total sell and profit will be calculated and saved.
- Removed "Add Tag Set" from tabs where this function is not possible.
- PennBarry gravity units are displayed based on selected candidate and search criteria.
- Quick Submittal link displayed with a candidate will display a popup with submittal report data.
- When electing to edit an Air Distribution product displayed in the estimate grid, the product will be displayed in the Air Distribution product selector for making changes.

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- Users can now edit multiple lines in the pricing grid so that the marketing program and ship cycle can be changed across several products.
- When new candidates are selected, the screen will now display loading symbol as the chart is cleared and new drawing is displayed.

Controls

- The Triatek Venturi Valve is now available for selection.
- Pricing override data will persist following an AOMS customer data update.

Ducted Systems - Unitary

- Generated documents will show the currency of the estimate on documents.
- All Commercial Unitary ducted systems products can be displayed in the same schedule.
- Unitary products users can elect to display Sale Price and Extended Sale Price in Canadian Dollars.
- Validation logic change - The orange status icon will display for saved items that are not in the catalog database.
- When a phased out commercial product is added to the estimate using direct entry, the status will be green and mass validation is not required. When an obsolete commercial product is added using direct entry, the validation status will be red, and the price will be displayed as \$0.
- Copy project will now successfully include Premier products in the target project.
- Improved document generation code.
- Changed brand filtering to rely upon brands assigned to the account vs brands within the product database.

Fire Detection Products

- User is now provided confirmation on save or submission of a purchase order.
- Purchase orders can now be previewed before submitting.
- Ship to and Export Compliance details are displayed and editable. This is prefilled from the project contacts with ShipTo and SiteOwner roles.
- The Export Compliance field is no longer a required field for orders.
- User Defined Products can now be added to my purchase order.
- Parts may not be added to a new order if they are already contained on an existing order.
- Fire Detection BOM view now contains dealer's discount percentage.

Ducted Systems – Applied Rooftops - Premier

- Updated heat entering DB to include heat of the fan motor.
- Added help text images shown for Gas Heat Input, Electric Heat Level, Cabinet Options, and Exhaust Air Opening Location.
- Replaced generic fan selection error with additional details and logging so the user will be able to correct their selection.
- Updated VTZ file with updated validation rules.
- Updated requests for Salesforce data to use common Web APIs.

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Ducted Systems – Applied Rooftops – S100/OmniElite/YPAL

- Added new options for adding belt guards.
- Added new options for adding pre and post dirty filter switch.
- Added new option for selecting piezoring option.
- Added new option for selecting megnehelic gauge option.
- Added tools to support future seismic certification.
- Added element tree debugging tool for S100/TempMaster/York applied rooftop units.
- Created separate allowed list for determining access to products.

Fixes

Selection Navigator Platform

- Corrected issues where projects are no longer visible.
- Corrected issue where information tab fields are not editable when another estimate in the same project is locked.
- Corrected issue where PCAT and Extended Warranty are not included in the cost of the estimate.
- Correct issues where pressing Enter key while on the sequence number results in submission to a blank page.
- Corrected issue where delete project button does not work following creation of document repository.
- Corrected issues with sharing rules that prevented projects from being visible in project list.
- The search feature limits the list of team members to be added based on the account your project is created within. BSNA projects will be able to search across all users in the branches while non BSNA project will be limited to users in their account and JCI identified users within JCI.
- Implemented locking mechanism on common files to avoid issues with contention that resulted in a sharing issue.
- Updated the SharePoint site profile URL endpoint.
- Updated Help with new functionality and all video links.

Controls

- Corrected issue where Ring Manager parts are not available for selection.
- Venturi Valve Image, include missing product image in Available Products Dialog

Ducted Systems - Unitary

- Submittal document will now populate the Location Field from the Site Owner contact role.
- Submittal document containing Unitary and Premier units will now match sorting from the estimate grid.
 - Quote document corrected to follow the Sort Order field in the estimate grid.
 - Corrected issue where the sort order from the estimate grid is not preserved.

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- Corrected issue with sorting when items are deleted from the product grid.
- Corrected issue where the Commercial Indoor Only units do not generate performance data.

Ducted Systems – Premier Applied Rooftops

- Corrected submittal issue where second unit does not show nomenclature properly.

Ducted Systems – S100/OmniElite/YPAL Applied Rooftops

- Addressed issue where the changes to quantity would clear selection choices.
- Corrected the shaft grounding ring quantities for supply and return fans.

Fire Detection

- Corrected issue with Fire Detection BOM view not displaying list price.
- Corrected issue where quantity entered for a retrofit valve does not save.
- When user enters a quantity beyond the acceptable limits, the system will now provide a message showing the allowable limit(s).

Special Discount Administration

- You can no longer approve a request that is past the expiration date.
- Corrected issues with “Grand Total, Net Price”.
- Corrected issue where cell validation and saves were not occurring without pressing a button. Movement between cells will now correctly execute validations and save.
- When a project has multiple estimates, SDAs can now only be seen within the estimate they are associated.
- Issue with tooltips being displayed after hover being completed has been corrected.
- Help text is now displayed when pressing the help icon on the page.
- The return button behavior corrected so that a SDA administrator will be returned to the SDA home screen.
- Enter key no longer generates an error when editing Released Between date fields.
- Corrected issue allowing multiplier to be outside the range displayed in warnings.
- Now prevent URL modifications affecting the validation of minimum values.

KNOWN ISSUES and ENHANCEMENTS UNDER REVIEW

- Estimates - support for List Price mode in estimates and selectors.
- Ability to re-order estimates and groups in the estimate navigation tree.
- BSNA Electrical Budgeting Estimate

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LET US KNOW WHAT YOU THINK

Do you have any feedback about these remedies and/or enhancements? Are they helpful? Will they improve your experience within Navigator? Please share your comments to help us better understand the needs of our users and continue to improve the tool.

Share your feedback/comments: navigatorsupport@hvacnavigator.com / 844-319-0726.

