

# Navigator® customer portal

## Navigator Release Notes

**Release Date: August 19, 2019**

The following remedies and enhancements are included in the Navigator release dated August 19, 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](mailto:navigatorsupport@hvacnavigator.com) or call 844-319-0726.

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### Portal & Offerings Catalog

#### What's New?

- Release of the HVAC Designer Tool. Developed for our BSNA Branches will give designated users the ability to design a system based on design criteria and then send that information to Selection Navigator and return the best candidate solutions for the designed application.
- The Air Systems Components Team requested a Branded Experience for their users as they specify equipment on projects. This includes the brands Titus and PennBarry in this release with Krueger, Tuttle and Bailey, and Superior Rex to start using the system sometime in the first quarter of FY20.
- The 'Product Availability' tile located on main page of Navigator has been deactivated, since the information being provided by UPGNet is no longer accurate. Please use Order Navigator for this purpose.
- Provided ability to find your Delegated Admin
- Ability to indicate Support Admins
- Display Customer ID at the top of each page in Navigator
- Provided option to enable Feedback Survey as a link on the right side of Navigator pages
- Streamlined batch process to handle application entitlements
- Enabled tracking for key fields on Navigator Account

#### Fixes

- Name updates in "My Profile" were not saved across the platform
  - Solution – Updated "Synch and Save" to save name changes across the platform.
- Message Center showing duplicate entries.
  - Solution – Assure messages only appear a single time.
- Delegated Admins not receiving the correct Tier 2 customer types
  - Solution – List is now limited to available customer types based on Tier 1 parent

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- Delegated Admin could not see all Tier 2 Accounts, if more than 2,000
  - Solution - Delegated Admins can now view all Tier 2 Accounts
- Placed limits on Address Selection of Country for Navigator Accounts and Contacts.
- Added Libya and Hong Kong as valid Country selection.
- Fixed deactivate user flow to work like deactivate sub account flow.
- Changed uLearn application to launch in separate window for easier use.
- Updated InKling tool to use Navigator as the authentication endpoint as opposed to UPGNet which is being sunset.
- Provide way for Internal Administrators of Chiller products to edit Air-cooled and Chiller Inventory.
- Air Cooled Chillers Inventory correctly displays for Quantech Brand
- Updated Offering Catalog to require document type to eliminate missing documents from UI.

### KNOWN ISSUES UNDER REVIEW

- None at this time

## Order Navigator

### What's New?

#### *Order Navigator Platform*

- Order History Page has export functionality now.
- Quantity in Mini Cart can be updated and added a checkbox to each line to select or deselect items so line can be deleted.
- Label added to Order Review, Order Detail, order History and Order Confirmation pages.
- Refined error messages for improved clarity

#### *Controls Storefront*

- Users can input tag information
- Implemented "Fast Track" checkout for Fast Track Delivery
- Provided ability to use Promotional Codes

#### *York & Frick Storefronts*

- Refined Chat button to encourage use
- Added notification when saving a template that is a duplicate of an existing template



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### *Ducted Systems Storefront*

- Collapse Items to show more or less Items added to My Cart, Order Review, Change Order, Order History and Order Confirmation pages
- Action Buttons placed at the bottom of the shopping cart page.
- If Order searched is not found in Order History Page and that order belongs to another account the user is associated with, then the system will display the message "This order is not associated with the account you are currently signed in as. Please switch to account XXX".
- Show next and previous buttons added to Product List Page.
- Ship To destination countries show for all sellers
- Availability will show obsolete products on Product List Page as discontinued.
- Available On field will display dates on Change Order and Order Detail pages.
- For partially shipped status, Order Header changes will not be allowed.
- Change Order screen will show Submit Button after Update is done.
- Added a link to see subtotal on Order Review and Change Order pages.
- Added message in Change Order page that user cannot increase the quantity at the line level.
- Added Drop down selection window for multiple selections on Order History Page.
- Packing list and Invoice forms added to order detail page.
- Packing list lookup added to Order History page.
- Ship complete and coordinated delivery available to Truckload-van or Truckload-flat shipping method.
- Updated Mass Upload capability for improved reliability.
- Adjusted Lead Time for G item to reflect current production.
- Provide access to obsolete product numbers for Source 1 products

### Fixes

#### *York & Frick Storefronts*

- Fixed error displayed on Product Detail Page due to decimal values in Available Quantity.

#### *Ducted Systems Storefront*

- Corrected ABC Indicator Table for "T" to read 'Coated Coil'
- Made correction so if click on items in Mini Cart it will display Product Detail Page.
- Mass upload did not notify correctly when obsolete or blocked items were included.
  - Solution – Updated error message to indicate the item has been discontinued.
- It was confusing for users to know that they needed to click on validate address button when there were multiple shipment addresses.
  - Solution – Added a message "Must Validate Address for all sellers to proceed."

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### KNOWN ISSUES and ENHANCEMENTS UNDER REVIEW

- None at this time.

### Selection Navigator

#### What's New?

##### *Selection Navigator Platform*

- In order to improve speed of navigation for high volume customers, work is being done to set focus to the most frequently used screen element and tab sequencing is also being updated to better accommodate keyboard navigation and data entry.

##### *BSNA*

- The project account may now be changed on the Project Details page after the project has been created.
- Custom labor tasks can now be added, edited and deleted from an estimate.
- Sales Proposal enhanced to include language for each type of system added to the estimate.
- The Performance Verification Tool (PVT) is now included by default on all Controls Conventional projects and Major Projects. The first NAE will include two hours of technical time to cover the cost of running the PVT. The Sales Proposal will include a statement in the Scope of Work for the PVT. This feature can be disabled/enabled on the estimate characteristics screen.
- Complex System Commissioning has been added as an additional Task group for commissioning tasks that will be performed by SE on Major Projects model, and by LSS in Conventional.
- Delegated Administrators can set HVAC Default Rate Locale and Fire and Sec Default Rate Locale to be used as defaults on new estimates.
- Users can now edit project details before the SharePoint document repository is created for the project.
- When Update Document button is pressed, the status of the document will be changed so the user knows updates are in progress.

##### *Air Distribution Products*

- ENVIRCO products can now be selected and configured.
- When all the lines on an un-submitted order are deleted, the order will not be deleted, allowing the user to add more new lines to the order without re-entering order details.
- The Product Configuration tab will now highlight the cell causing validation errors.

##### *Ducted Systems - Unitary*

- Added new Commercial Package Selection Wizard which allows a user to enter design conditions and then presents a list of available options for comparison and selection.



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- Users may now submit Mod Shop requests via email.
- Improvements made to improve performance of Direct Entry.

### *Ducted Systems – Applied Rooftops - Premier*

- The default CFM is changed based on the Voltage and Electric Heat options selected for a unit.

### *Ducted Systems – Applied Rooftops – S100/OmniElite/YPAL*

- Gas Heat supplemental drawings have been updated for 120-150 ton units.

### *Fire Detection Products*

- Addressed culture issues to support international regions.

### *Controls*

- The order details page will now show line items in the selected Display Currency for AOMS orders.
- For AOMS order details, the ship to address will default to the order header's details and may optionally be changed to a different address that the user enters.

## Fixes

### *Air Distribution Products*

- Multiple corrections made to Ruskin smart validation.
- Dynamic submittals will properly include the 1400 and LMHS products in generated document.
- Brand name properly displayed when adding products and using the Filter by Criteria tab.
- Corrected issue where Titus marketing programs are not presented for selection.
- Corrected tool tip message when generating Excel file after an order has been submitted. Message will now show "Product contains all submitted lines."

### *BSNA*

- Johnson Controls logo is now properly displayed on the BOM and Sequence Drawing as well as the Drawing Visio files.
- Valve, Damper and Point Schedules updated to have a similar look and feel.
- Manufacturers with a comma in their name are now displayed in the All Products view in Estimate Details.

### *Controls*

- Point Schedule now displays the page number.

### *Ducted Systems - Unitary*

- Duplicate models no longer seen when VRF/DFS systems are synced with PiApps.
- VC Pricing deactivation time is now valid through end of day instead of beginning of day.

### *Ducted Systems – Premier Applied Rooftops*

- ERW Performance data has been re-arranged.

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- When ERW Wheel Mode is set to ERW Stationary, the Cooling – Outdoor DB defaults to the ERW design condition captured.
- When ERW Wheel Mode is set to ERW Rotating, the Cooling – Outdoor DB defaults to 100.
- Premier units added to the estimate now show proper pricing in the Ducted Systems view.

### *Ducted Systems – S100/OmniElite/YPAL Applied Rooftops*

- When changing tonnage from 70 to 105, description is now properly updated.
- Submittal can now be generated when supplemental drawings are the only documents selected.
- Shaft Grounding Ring pricing corrected for 70-ton units with “Return Fan - VFD, with exhaust” option.
- Seismic Isolation option for 2” Spring is not available on 130-ton unit.
- Fire Detection
- Delivery icon has been removed from the navigation bar.

### 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](mailto:navigatorsupport@hvacnavigator.com) / 844-319-0726.