

# Navigator® customer portal

## Navigator Release Notes

**Release Date: December 16, 2019**

The following remedies and enhancements are included in the Navigator release dated December 16, 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?

##### *Portal*

- Automatically add Offering Catalog documents to JCI users.
- Removed several unused fields in Navigator Contact Records.
- Adjusted spacing on login page.
- Added account record fields for National Accounts.

##### *Offering Catalog*

- Provided capability to add Battle Cards to specific products in Offering Catalog.

#### Fixes

##### *Offering Catalog*

- Creating a new taxonomy creates duplicate records.
  - Fix: Updated taxonomy creation mechanism.
- Format for certain fields changing between Offering Catalog and Salesforce.
  - Fix: Updated interface between OC and Salesforce.
- Items in "Draft" status are being displayed in Offering Catalog.
  - Fix: Updated state requirement for displaying items in OC.
- Data in Support screen is wrapping.
  - Fix: Realigned text so there is no text wrapping.
- "News and Announcements" not displaying under "Tools" section.
  - Fix: "News and Announcements" now appearing as expected.

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- Removing items from a comparison causes navigation to not remove items from comparison.
  - Fix: Updated “Back to Product List” to remember actions, and not act like the “Back” button.

### Order Navigator

#### What's New?

##### *Order Navigator Platform*

- Added change, reorder, cancel and manage notification buttons to Order Detail Page.
- Display the user's name on the top of the page when using the CSR Flow in Order Navigator.

##### *Controls Storefront*

- Updated data to show lead time for more products.
- Added capability to add meaningful name to quotes to help users find those quotes later.
- Updated the Order Confirmation and Submission pages to include the Purchase Order number and Additional Reference / Job Number field when ordering with a credit card.

##### *Ducted Systems Storefront*

- Change Order Screen has Validate address functionality now.
- Improved error messages in Address Book.
- Added Jobsite, Ship Complete, Coordinated, Pooled, Trade Show, No Subs and Past Delivery Date to Order History report.
- Added List Price to Product List Page.
- IPA/Quotes added to search IPA orders in Order History Search section.
- Images and Long Description shows for Premier Products on Product Detail Page.
- Ads and promotions are more specific to Product Category now.
- Updated Ship To fields to not require a postal code when shipping to a country other than the US or Canada.

##### *Chiller Storefront*

- Added capability to add meaningful name to quotes to help users find those quotes later.
- Allow users to enter a promotional code to get a percentage discount on items in their cart.
- Updated Mass Upload to use Excel files instead of .csv files.

##### *Frick Storefront*

- Updated alignment in the Frick storefront header.

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### Fixes

#### *Ducted Systems Storefront*

- Phone number will not validate if there is a space after the number
  - Fix: Updated validation method.
- Line comments for items in cart were not being saved.
  - Fix: Updated code to maintain line comments.
- Items that are in “Not Orderable” state are showing as active in Order Navigator.
  - Fix: Updated to show non-active status.
- There are appearance differences between Chrome Browser and IE for Change Order.
  - Fix: Updated display to address IE concerns.

### Selection Navigator

### What's New?

#### *Quick Quote Capabilities*

Indirect channel accounts with ducted systems or air distribution products now have access to a “Quick Quote” option that is optimized for quicker selection, estimating and document generation. Enhanced keyboard navigation through pages, tabs and grids provides a more efficient workflow.

- [Quick Quote Overview Video](#) can be found under My Account and Help-Training in Navigator. It is also accessible from the Message Center.
- New Quick Quote application tile is available for starting a Quick Quote directly from Navigator.
- Selection of available products can be accessed directly from the Estimate Details.
- Direct Entry allows adding Ducted Systems products to the estimate details by entering model numbers in a side panel.
- Product selectors can be quickly found by a new search capability in the available products side panel. As characters are entered matching selectors are displayed.
- Changes made to products in the Products grid will be reflected in the Estimate Summary panel.
- The Product Summary panel allows updating ducted systems product costs, estimate risk, estimate margin, estimate freight and estimate sell price. Change made in the Product Summary panel is proportionately applied to the appropriate products in the estimate.
- Documents can be generated using the new Quick Docs button from Estimate Details. Document creation will happen in a dialog window, allowing a quicker return to the Estimate Details page.
- The Quick Docs capability supports downloading and emailing documents.
- Project name does not need to be entered until the Quick Quote is saved as a project. Once saved as a project, you can create Special Pricing requests and Orders.

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### *BSNA*

- The eProfile Name is now displayed on the Electrical Budget Estimate takeoff tab when the system contents are expanded.

### *Ducted Systems – Residential and Light Commercial*

- When submitting orders, the PO number is verified as not previously used before the order can be marked as complete. If the same PO number is found, the order will remain in an incomplete state and may not be submitted.
- Within direct entry, it is now possible to import an Excel file containing a list of products. The spreadsheet imported must contain the following three columns: Model Number, Quantity and Buy Multiplier.
- Selection Wizard now supports the addition of ERV accessories.

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

- Updated Electrical / controls drawings based on single point or dual point power and capacity are now included in the submittal package.

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

- Rearranged location of weights and dimensions on the Performance Report. Updated corner weight calculations on performance sheets to address DDP fan calculations for inlet wall inclusion and discharge wall exclusion.
- Reverted condenser fan data to previous version.

### *Air Distribution Products*

- When items are copied with a freight quote, the freight is reset when pasted to new estimate.
- Project level freight quote details are retained when re-entering the freight quote dialog.
- When an expedite option is selected for a PennBarry product, the appropriate marketing program will be selected automatically.
- Some items now support special values. A dialog will prompt for the Special Quote Number and details. When a user hovers over a field supporting special options, hover over help will provide a description of the special option.
- Save options have been added within the product selector to allow saving work without returning to the Estimate Details. Save button will save all selections, but remain on the product selector, while Save and Exit button will save and return the user to the Estimate Details.
- Columns in the product selector now support filtering rows based on Equals or Contains criteria.
- When items are copied with a freight quote, the freight is reset when pasted to new estimate.
- Hotkey shortcuts have been added to the selector for improved keyboard navigation.

### *Fire Detection Products*

- System name is included on System Documents and System Reports.
- When a product within a system is selected for editing, the system selection will be used for editing the system and product.

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### Fixes

#### *Project List*

- Project owners who could not see their projects in the My Active Projects are now able to see those projects.
- Project name now restricts special characters that are not supported. This addresses issues where the Estimate Details would not load.

#### *Team and Contacts*

- Corrected issue where project owners are not able to edit Team Members on their project.

#### *User Defined Products*

- Inconsistencies with exporting and importing user defined products have been addressed. Corrected issue where one row is missing from exported user defined products.

#### *Estimate Details*

- Fixed an issue where using the space bar in some dialogs would cause the focus to 'jump' and create a miss-placed drop down to appear on the screen.

#### *BSNA*

- SharePoint repository issues caused by changing project profile corrected.
- Labor rates are now correctly set to the locale of the branch for which the project is created.

#### *Air Distribution Products*

- Actuator pricing now showing on drop down for Louvers.
- Error for CDRAMS with 16" diameter no longer appears before actuator has been selected.
- FSD35 is now successfully validated after sleeve length is selected from options.
- Special Discounts that had a multiplier entered prior to rejection are no longer applied to items in request.
- Special Discount no longer transmits Quote with SDA prefix so that quote is recognized.
- Dynamic submittal now generated for all Gravity Ventilation Models.
- Corrected issues with preview of documents.
- Proposal documents will now generate when CD35,2BDE,ELBLP has been added and validated.
- After selecting the Request Freight Quote button for a line item, the freight is now updated in the selector.
- Oops message no longer displayed when selecting edit from Estimate Details.

#### *Controls*

- MAD-O and SF1-O items are now included on the BOM and Sequence Drawing.
- Error message now clearly communicates when unaccepted special characters are entered as part of the system name.
- Fixed an issue that prevented Mount Type to be edited in Controls BOM.

#### *Ducted Systems – Residential and Light Commercial*

- The Buy Price on an order is now properly updated with the buy multiplier from an approved IPA.
- Reheat performance data is properly populated on the DS Schedule.

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- Selections now retained when navigating away from and back to Performance Tab and Accessories Tab.

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

- Outdoor Air and Return Air CFMs are now properly updated when tonnage is changed.
- Corresponding price now shown in product description after selecting a new tonnage.
- Proper brand logo now shown on the submittal Drawing Report.
- If a Premier unit has an ERW selected and the Supply Air CFM matches the ERW OA CFM, the configurator will properly pass the ERW Supply Air Temp DB and WB data to the Cooling Coil Entering DB and WB.
- Controls Diagram now properly generates for units with 100% RA, Standard unit with Enthalpy, Standard unit with Dual Enthalpy, Exhaust Fan, Return Fan, or ERW.

### *Fire Detection*

- Datasheet link now available on the part details section of selectors for Canadian Autocall accounts.

### 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.