

# Navigator® customer portal

## Navigator Release Notes

**Release Date: February 18, 2019**

The following remedies and enhancements are included in the Navigator release dated February 18, 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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### Order Navigator

#### What's New?

- All – Text labels have been added for Navigator icons
- Chiller and Frick Storefronts – Users are now able to filter on products that have images
- Chiller and Frick Storefronts – Order Details now shows additional shipping information
- Controls Storefront – Shipping information is shown for each line item
- DS Storefront – Addition of Filters to help find and sort products
- DS Storefront – The DS seller message for truck load freight is now dynamic and will only show when the truckload options are selected
- DS Storefront – User may now search for multiple SKU's at the same time by using a comma between model numbers
- DS Storefront – Weight and Dimensions are shown on the Product List Page
- DS Storefront – Previous and Next buttons are now on the Product Details Page to allow users to go to the next product in the list, rather than having to navigate back to the Product List Page
- DS Storefront – Seller now shows on the Product Details Page
- Mobility – Various improvements made for mobile devices

#### Fixes

- All Storefronts – Users cannot search by UPC code
  - Solution: Users can now search by UPC code
- Controls Storefront – Users are not noticing the free shipping disclaimer
  - Solution: Bolded the message font to be more noticeable

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- Controls Storefront – Users were able to select the next day as the requested delivery date, which could not be met
  - Solution: User must select a date two days out and must not be a weekend day
- DS Storefront – Orders are being hung up when a special character is used in the notes fields
  - Solution: A note is shown to the user making them aware to not use certain characters. In addition, if a character is typed that is not allowed, it will automatically be removed and notify the user.
- DS Storefront – Users are seeing a generic “System Down for Maintenance” message on the Product Details Page
  - Solution: Messages are now more detailed to convey actual reason for error.
- DS Storefront – Orders that had B,C, G, or S products were allowed to be cancelled in Order Navigator
  - Solution: These orders are not allowed to be cancelled. Orders with these products no longer have the cancel button available.
- DS Storefront – If there are blank spaces before or after the model number in the search section, no results are found.
  - Solution: Update has been made to remove leading or trailing blank spaces from search criteria
- DS Storefront - Add same product a second time from Quick Order and product does not get added to cart.
  - Solution: Change made so if same product is added from Quick Order, product is added to cart.
- DS Storefront - If CSR rep logs in to place order on behalf of customer, the company name is overlaying with My Account.
  - Solution: Change made so company name does not overlay with My Account.
- DS, Chiller & Frick Storefront – If enter first few characters of part number in search field, the autofill overlays the search criteria.
  - Solution: Update made so autofill does not overlay search criteria.
- Chiller & Frick Storefront - Store name is overlaid with Order Home Page Link
  - Solution: Change made so store name does not overlay with Order Home Page link.

## Navigator Portal and Offerings Catalog

### What's New?

- New Navigator Message Center has been created on the dashboard landing page to better notify our user of new features, up-coming changes and displaying release notes.



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- UPGNet Application Additions to Navigator:
  - FIM Administration
  - Consumer Rebate/Promo Finance
  - Consumer Rebate Recovery Tool
  - Information Center
  - Commercial Inventory Application
  - Marketing Action Venter Daily Access Report

### Fixes

- Fixed Sort Order on Application Cards to show up alphabetically.
- Fixed Sort Order when Assigning Brands to Navigator Accounts to sort alphabetically
- Added Offering Catalog Product Preview button to what will be displayed to customers
- Added Ability to Share Product Pages with different levels of taxonomy
- Change made so Manage Account is not available to non-Delegated Admins

## Selection Navigator

### What's New?

#### *Selection Navigator Platform*

- Continued improvements to document repositories and document creation.
- Improvements to performance including Estimates.
- Estimates now respond to the user's language preference selected in Chrome. This affects dates, numeric fields and currencies. When values are shown, there are labels presented with the currency displayed.

#### *Fire Detection Products*

- Now able to upload product catalogs with special characters in the SKU.

#### *Air Distribution Products*

- Support for selection and ordering of PennBarry fans. Improved fan selection workflow including updated layout for inputs, results candidate grid, and fan curves and drawings.
- Order total is now calculated based on a roll-up on total instead of cost.
- Ruskin quotes have a 30 day expiration and 30 day grace period. Within grace period user can decide whether to update pricing, but after the grace period, items will be invalid until prices are updated.
- Smart validation will find the lowest priced candidate when adding new lines.
- Special Discounts only allowed when account minimums are satisfied.

#### *BSNA*

- Cable counts are now displayed with metrics.
- "Quote – Unit Price" document is no longer available to BSNA users.

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- Technical changes to how SharePoint document repositories are provisioned that should result in faster and more consistent repository generation.

### *Controls*

- Controls selectors will use the Chrome language preferences for the display and entry of dates and numeric values.

### *Ducted Systems - Unitary*

- Direct entry capabilities enhanced for Ducted Systems commercial product selection.
- Product selectors for Premier will include the tonnage in description.
- Added Refrigerant Charge to the performance output for Premier.
- Updated BACnet points list on the cross reference tab.

### *Ducted Systems – Applied Rooftops*

- Product selectors for applied rooftops will include additional details in description.
- Implemented feature to validate applied rooftop configurations and versions to force new selections when a product is no longer available.
- Enabled filtering on 50Hz electrical service for applied rooftops.

## Fixes

### *Selection Navigator Platform*

- Corrected issues with dates when the culture selected is other than en-US.
- Corrected issue where the effective date for pricing was calculated incorrectly by one day.
- Issues fixed where buttons do not appear for the Project Owner because they are missing Read/Write privileges.

### *BSNA*

- Estimate updated to support names of up to 250 characters to avoid truncation issues when booking orders.
- Corrected issue where document package fails generation when existing documents are re-ordered. Additionally added retry logic for packages when they fail.
- BOM schedule and BOM report will enumerate valves and dampers for typical systems.

### *Controls*

- Selector now maintains the damper torque when selecting a different damper.
- Reduce System Selector errors by eliminating entries for EBA details.
- Corrected issue where a damper with factory added actuators could not be added because of actuator count.

### *Ducted Systems - Unitary*

- Corrected issue when selecting “Update Prices” action. Some models returned zero for price. Model will now be verified with pricing database if model does not exist in the catalog.

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- Corrected issue with Direct Entry. It will not allow selection of obsolete models. Allows selection of default models. Properly saves all options and is displayed properly in the estimate grid.
- Correct title is now displayed on the Submittal document for JCI Commercial Split Systems.
- Corrected Residential Split validation logic with TXV and Orifices.
- Corrected issues where the Power Exhaust is not included in electrical calculations for L524T TempMaster.

### *Ductless Systems*

- DFS models will show correct prices instead of zero when entered via Direct Entry.

### *Ducted Systems – Premier Applied Rooftops*

- Corrected issues where pricing information was not being displayed on pricing reports for Premier.
- Updated performance report to include Lights (amps), Leaving Air Temperature (coil), and Humidifier values.
- Changed the ordering of the nomenclature page so that numbers are sequential on each page.
- Corrected issues with copying and pasting Premier units within estimates.
- Change output of humidifier output to feet instead of inches.
- Select other option message is no longer displayed when no other options exist.
- Calculated CFM Value is now displaying in performance input field when Airflow type is ACFM.
- ERW winter changes now appear in the Product Info popup.
- Updated default gross margin on Premier product to zero.

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

- Dialog messages will no longer display the wrong name/brand when selecting applied rooftop units.
- You can now have Special Quote lines with the same SQ Number.

## KNOWN ISSUES and ENHANCEMENTS UNDER REVIEW

- Controls – special pricing process and EBE application.
- Fire Detection –pricing and special price requests.
- Estimates - support for List Price mode in estimates and selectors.
- Estimates - activate/deactivate at product level to enhance what-if scenarios.
- Ability to re-order estimates and groups in the estimate navigation tree.
- Team Members and Contacts – contacts and team members to be based on the account of the project.
- National Account Documents - support for uploading multiple quote templates and improvements to document packaging.
- Platform - Ongoing performance improvements within product selection, estimating and document generation.

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