

# **Navigator® customer portal**

## **Navigator Release Notes**

**Release Date: January 16, 2020**

The following remedies and enhancements are included in the Navigator release dated January 16, 2020. 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*

- Requested notifications can now be reviewed and either accepted or rejected by leadership for posting.
- Updated available fields on account records for clarity.
- Improved look and feel of breadcrumb navigation to be consistent across site.

##### *Offering Catalog*

- Updated breadcrumb navigation on Offering Catalog pages.

#### **Fixes**

- Corrected user profile to make mobile number and fax number non-required fields.
- Manage Account/Sub Accounts – corrected wrong label information when there are no records to display (Previously, when no records, it showed 1 of 1 records.)
- Corrected issue so Navigator Users are always deactivated after 180 days of inactivity.
- Resolved data for Offering Catalog Descriptions which was causing issue with being able to select the product to display the model data page

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### Order Navigator

#### What's New?

##### All

- Added collapse and expand sidebar feature to Order Navigator.
- Added Tab view on Product Detail Page. All Storefronts except DS has 2 tabs now - Description and Documents. Description is the default tab for all stores, except DS.
- Updated progress bar for bulk upload to show amount of time remaining to complete upload.

##### Ducted Systems

- Added Tab layout to Product Detail Page - Availability, Description, and Shipping Specs. Availability being the default tab. Documents tab coming soon!
- When shipping options are changed, user must accept changes before continuing with checkout.
- Added A-B-C lead-time indicator to each line item on the Order Detail and Change Order pages.

##### Controls

- Increased number of parts that will show superseded information.

##### York

- Started collecting analytics regarding Parts Navigator link usages.

#### Fixes

##### All

- Added an error message when attempting to upload a bulk load file with no data
- Resolved Change Order issues when using Internet Explorer
- Addressed issue with using quotations in text fields

##### Ducted Systems

- Line items now appear in sequence
- Created scheduled report to identify if Order was not replicated into SAP

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### Selection Navigator

#### What's New?

##### *BSNA*

- When switching to List Estimating Mode, labor hours are adjusted by a scaling factor of 110% for Project Management and 125% for all other labor groups except Electrical and Mechanical Install which remain at 100%. The labor rates for all labor groups are updated by 110%. Additionally, the custom hours and characteristics columns are hidden in the labor summary screen.

##### *Air Distribution Products*

- Favorites functionality has been added.
- Tool tips added to buttons in the selector for guidance.
- When an order report is generated that includes a selection required product, the sequence of the selections will follow the sequence of the configuration.
- Pricing Report includes Special Values added during configuration.

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

- New Select 27.5-50 ton Rooftop Package Product Release.
- New Pro 6.5 -12.5 Ton ZB and ZN models added with 3 stage cooling.
- New Core 7.5 -12.5 Ton ZL model released with 3 stage cooling.
- Coleman logo updated on product selection screens and documents.
- Residential Package Gen 3 Release
- Selection Wizard candidates updated with economizer and side duct configuration.

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

- A project number will be shown on Submittal Cover Sheet and Order Report when a project number has been added to the project.
- Updated Condenser Fan Motor FLA.

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

- Updated rules for 208/230V disconnect amperage rules. The standard SCCR rating and the 65 kA SCCR rating are allowed for 25-30 ton units. An unfused 600A disconnect is allowed for 40-50 ton units.
- When ERW is set to Stationary Wheel Mode, the ERW performance data will show the same data as 100% OA input for verification purposes.

##### *Fire Detection*

- New IDNet circuit configurator available in System Selection.
- Added support for pricing in Indian Rupees.
- Simple Quote document available for Fire Detection products.

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- When a special pricing request is canceled, an email notification will be sent to the Sales Manager's email.
- Link to datasheets is available for Simplex brand accounts from the product selector or the information icon in Estimate Details. The Simplex knowledgebase will open in a separate tab with a data sheet or list of data sheets for the selected product.

### Fixes

#### *Documents*

- When an invalid email format has been entered, user will be prevented from creating documents from the Quick Documents window.
- Corrected issues on the Create Documents page where the focus moves to first column while entering filter criteria.
- Number of Records selection is now saved on the Create Documents page.
- Create Documents page no longer shows a blank screen for estimates that have a single quote character as part of the estimate name.

#### *Estimating*

- After executing Update Prices, Unit Costs are now correctly updated for S100 and YPAL products.

#### *BSNA*

- Zone Temperature items are no longer missing on the BOM and Sequence drawing for an Air Handling Unit Multizone (mixed-air dual duct) system.

#### *Air Distribution Products*

- Corrected issues with saving tags and tag sets.
- Address is now dynamic on Tuttle & Bailey Dynamic Submittal documents.
- Products tab within selector is no longer blank when navigating from the Selection tab.
- Proposal documents will be successfully created when the estimate includes the following products: 6L, SD60V, SDRS25M, HBC, HB.

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

- Removed error when updating the cost of a Ducted Systems product when there is also a User Defined Product that had been entered via direct entry.

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

- Performance report no longer shows the hide/show comments checkbox when generated with the Spec Text option.
- MLP/Unit is now displayed in the product information window for PCAT after selecting PCAT options and updating the quantity inside the selector.

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

- Tier 2 users no longer see Internal Server Error when trying edit a unit after it was previously added.
- Warranty reports now properly hidden from Tier 2 users.

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### **Known Issues**

#### *Estimating and Special Pricing*

- When navigating from the Special Pricing screen back to the Estimate Details product grid, the products appear to be missing. There is no loss of data including special price requests or products. The products will appear correctly by selecting any interface element or refreshing the browser page.

### **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.