

# **Navigator® customer portal**

## **Navigator Release Notes**

**Release Date: July 15, 2019**

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

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### **Portal & Offerings Catalog**

#### **What's New?**

- Ability to Copy Billing address to Shipping address through selection of a checkbox.

#### **Fixes**

- Fixed tabbing sequence for the screen where new accounts are created.
- Fixed issue where some applications were not showing up under the favorite's pulldown.

#### **KNOWN ISSUES UNDER REVIEW**

- None at this time.

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### Order Navigator

#### What's New?

##### *Order Navigator Platform*

- Consistency of Icons – across the Order Navigator portal, we have updated the phone, search, and calendar icons to be more user friendly.
- Phone Number & Zip Code validation – on the My Profile page, we have implemented phone number and zip code validations.
  - Phone number will not accept alpha characters.
  - Zip code validation enforced for US & Canadian addresses.
- New consistent headers for all storefronts, and ability to collapse the Navigator's header.
- Ship To Name limited to 35 characters.
- Product Details wording appears on the Product Details Page

##### *Controls Storefront*

- Error Handling for Bulk Upload – When you upload a file, and if there are any SKUs that fail to be added to the cart, an error file will be generated by the system.
  - It will only contain SKUs which failed while uploading
  - The file will have the part number and quantity
  - The user will be given an option to download this file with a link next to the upload option

##### *Reliable Storefront*

- Free Shipping Image will be displayed under Quick Order

##### *York & Frick Storefronts*

- Prices on quotes will now be locked until the expiration date. After the 90 day expiration, prices will be updated to show the current price.

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### *Ducted Systems Storefront*

- List Price for New Line Item now populated on Order Confirmation and Order History
- Added Invoice Forms and Order Acknowledgment on Order Details Page for the selected order.
- Added a new link on Order History page for Ship Status.
- The Quick Links Section in Order History was moved on top with all links in one section.
- Added Supersession message to show for products that have been replaced on Product List Page.
- Added a message “Click the part no. for details” on Product List Page and made the part number hyperlinked so that the user knows they can click on the part number to be taken to the Product Details Page.
- Added message to Change Order page “Item is partially shipped, no changes allowed” so the user knows they cannot change orders for partially shipped orders.
- Added “Attention To” email and phone number fields on Shipping Address section, Order Review, Order Confirmation, and Order Details pages.
- Added Air Freight charges to show for Source1 products if Air Freight shipping option is selected.
- Ship complete fees to be added to only DS Seller and not Source1 or Ductless.
- Coordinated Delivery can be unselected when Job Site is selected.
- Lead Time for Premier product increased to 70 days (ABC Indicator = G Engineered to Order).

### *Ducted Systems & Aftermarket (York and Frick) Storefronts*

- Shipment and Delivery Notifications - Under Account Profile, customers will have ability to select the types of shipment and delivery notifications they want to receive.
- Carrier Shipment & Delivery Notifications will be enabled so when an order is shipped the customer can receive an email with a carrier tracking ID number confirming shipment. The ID number is also a link to the carrier site where the customer will be able to see the expected order delivery date and track its progress.
- Shipment Notification (Departed, Delivered and Delayed status) is available in My Accounts Page where user can set the preference and it will be default. The changes will reflect in Order History/My Orders table in manage notification section.

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### Fixes

#### *All Storefronts*

- If one item in cart was ineligible, all items appeared as ineligible
  - Solution – Only ineligible items display as ineligible in cart

#### *Ducted Systems Storefront*

- Add to Template Button showed for products that were not orderable
  - Solution - Removed the Add to Template button
- Available On Date Missing
  - Solution – Available On Date is Displayed on Order Details Page
- After making an update to the cart, the user is taken to the first Seller tab
  - Solution - Updated the cart to stay on the same tab after an update
- Pricing section reflects on top and bottom on Order Review
  - Solution - Removed pricing from top of the page and is now shown only at the bottom of the page.

### KNOWN ISSUES and ENHANCEMENTS UNDER REVIEW

#### *Ducted Systems Storefront*

- Improvements to phone number and zip code validations.
- Required fields on User Information tab and Change Order do not match.

### Selection Navigator

#### What's New?

#### *Selection Navigator Platform*

- When items are edited and validated in the Estimate Details grid, detailed messages from the product configurator can now be presented to the user.
- The Project List and Project Details screens now show a proper Last Modified Date and the person that Last Modified the project. Simply viewing a project does not update this field.

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Currently updates are limited to changes in project details, but will be extended to estimate detail changes in a future release.

- Tier 1 users can now copy projects from Tier 2 projects on which they are a team member.
- Orders tab will now display in the same currency as the estimate details.
- More reliable Visio to PDF conversion.

### *BSNA*

- The following documents have been added or revised for BSNA Project Profiles: Defense Priority Form, Equipment Acceptance Procedure Letter, Equipment Release to Operations Meeting Checklist, Purchase Order Discrepancy Resolution, Service Warranty Notification Letter, Startup Procedure Notification Letter, Release to Operations Checklist, Subcontract RFP no Ts and Cs Conventional, Mockup Checklist and Change Order Proposal – Standard.
- When copying a project with inclusion of team members, the team members copied will have proper access to the SharePoint document repository that is created.
- When SharePoint document repositories are not created within 15 minutes, the user will now have the ability to request a “Retry” from the Project Details screen.

### *Air Distribution Products*

- The freight percentage will be displayed when hovering over the freight field for a product.
- Fill down feature now works on the Tags column.
- PennBerry customers can request a freight quote, generating an email to the brand approval team.
- Full brand name is now displayed.

### *Ducted Systems - Unitary*

- Updated Residential Split AHRI matchup data.
- Added pricing family to Estimate Details grid.
- Order submission now prevents duplicate order submissions.
- When directed to offerings catalog, all associated documents will appear including technical guides.
- Added address verification to order submission.

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

- Effective dates can be selected for pricing.
- Performance data now includes additional information for Energy Recovery Wheels.
- Electrical Heat Ampacity is now calculated and displayed on the Performance Report.

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

- Price increase of 5% across entire product line will be effective July 15th, 2019. This includes unit, motors and warranty.

### *Fire Detection Products*

- When performing mass edit, quantity updates are now applied to all selected items.

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### Fixes

#### *Selection Navigator Platform*

- When groups and systems are copied and pasted, the ordering from the source is properly maintained.
- Delegated Administrators and Managers will now see the correct navigation icons in the Project List.
- Project list will now properly show projects with a Warranty status in the All Project View.
- When adding User Defined Products, the designation field length is now limited to 50 characters matching the allowed length that can be saved.

#### *Air Distribution Products*

- The Air Distribution Products selector is now properly shown instead of the System Design Tool product selector.
- Brand can now be added as Basis of Design on the special discount authorization screen.
- Dynamic Submittals will now properly include all Excel worksheets when converted to PDF format.
- Tool Tip for Excel no longer displays “Validation Pending” within configurator.
- All columns in the candidate grid will allow filtering.
- Corrected several smart validation issues with Ruskin products.
- Order header can be validated and submitted when it contains DTQP VAV products.
- DTQP VAV will now allow 0 CFM as a valid value.
- S300FL now shows proper list of valid duct diameters for selection.
- Tagsets are now displayed on the order report tab for all ASC brands.
- Pricing Detail Icon will now show details for the related item instead of the first item in list.
- Update Prices from Estimate Details will now properly update multipliers.
- The Special Discount approved multiplier is now displayed in the products tab instead of ‘1’.

#### *BSNA*

- When cables are added at the Estimate level, they are not included in cable metrics for each system.
- Booking file now correctly reports System Standard Score.
- When team member roles are changed, permissions are now consistently on SharePoint document repository.
- Opportunities are not created or linked and opportunity fields are no longer displayed in project details.
- When submitting an order, all the materials in the order (irrespective of the selected node in the estimate navigation tree) will be properly included.

#### *Controls*

- Items missing a description no longer result in \$0 cost.

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### *Ducted Systems - Unitary*

- When the information icon for a Residential Split system is selected from the Estimate Details grid, the user will now see the performance data.
- Corrected issue caused by deleting a Thermal Expansion Valve accessory that resulted in the remaining TXV including the price of the deleted TXV.
- Corrected 3-6 ton drive option selections.
- Issue corrected that prevented Residential Split model tab from loading when an Orifice is selected.

### *Ducted Systems – Premier Applied Rooftops*

- Corrected commercial validation issues with Premier.
- Corrected issue where quantity could not be updated when multiple accessories have been added.
- When finding PCAT startup support, Canadian users may now search zip codes with letters.
- Spinner is now centered and visible when rating a Premier rooftop unit.
- Corrected issue where MS Word version of Submittal report could not be opened for Premier units.

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

- When editing an existing Premier unit, the Detailed View in product selection now properly displays available options.
- Fixed issue with DDP, Diffuser and Final Filter that created a loop preventing valid selections. Diffuser is required for FC and AF Fans, but is not be allowed for selection with a DDP Fan when the final filter option is selected.
- Users may now generate DWG formatted document for unit and curb.

### *Fire Detection*

- Bill of Material file can now be generated in Excel with conditional formatting.

## 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.

