

Navigator® customer portal

Navigator Release Notes

Release Date: June 13, 2019

The following remedies and enhancements are included in the Navigator release dated June 13, 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 or call 844-319-0726.

Portal & Offerings Catalog

What's New?

- Created Latin America and Middle East Connected Community
- For **inactive** users the system will now display a message to contact the customer service team to reset the password. Earlier, it was not clear that they will not be able to reset their password on their own.
- Navigator Portal users will now see the six most frequently used favorite apps on the navigator landing page. If a user has more than six favorites, additional favorite apps will display on click of show more option.
- Users will now have an option to choose another account, if the account that they last logged in with is not active anymore.
- Users using the system via the guest flow (without logging in), will now see a brief description of the app that they are trying to access.
- We have updated the buttons on the 'My Profile' page to make for better clarity. Changes are:
 - 'Sync and Save' button now will be named as 'Save'
 - 'Clear' button will now be a 'Clear All Fields' link
- Contacts created under Tier 3 Accounts will not be prompted to assign permission groups.
- On creation of a new Tier 2 account, system will redirect the user to complete the brand assignment so that the step is not forgotten.

Fixes

- Fixed Inventory Database - Air-Cooled Chillers Script to Update Qty from Web Service
- Allow Navigator header to be collapsible when on Marketing Dashboard application
- Add Company Name to Litmos SSO



Navigator® customer portal

Navigator Release Notes

- Update Selection Navigator Ducted Systems Product Page to reflect latest Offering Catalog Changes
- Fixed issues associated with the Offering Catalog Mobile Experience
- Fixed Offering Catalog Spinners to let users know operations are taking place in the background
- Revert Brand Name changes for Channel Fusion Distributor/Dealer Interface
- Corrected code to only display documents that are in Published status.
- Fixed issue where html code was being displayed in footer section of Navigator Contact creation page.
- Delegated Administrators are able to add Tier 2 Accounts, without brand assignment
 - Solution: In May release, we implemented a change so Delegated administrators would be navigated to the brand assignment screen once a Tier 2 Account is created.
In June release, we are making the brand assignment mandatory for Tier 2 Accounts.

KNOWN ISSUES UNDER REVIEW

- None at this time.

Order Navigator

What's New?

Order Navigator Platform

- Added a new message in the My Carts page that let the user know when the saved cart expires, "Carts expire after X amount of days. Please save the cart as a Template to keep for a longer period of time." The amount of time is set by the business unit for each storefront.
- Removed Address Book option on Billing Address, because Billing Address are not allowed to be change.

Controls Storefront

- The system will now show a message to the user that they are 'x' number of dollars away from free shipping, if the 'x' amount is less than hundred dollars.
- Users will now be able to upload items into cart using csv/excel upload.

Navigator® customer portal

Navigator Release Notes

York Storefront

- Users will now be able to select the location they want to buy from the product detail pages. The system will show the list of locations and the quantity available at each of the locations for the users to make an informed decision.
- Users will be able to see the location details in the cart on product detail page as well.
- System will validate that all the items in the cart are from the same location while checking out, and if they are not show an error message to the user to correct the same.

York and Frick Storefronts

- Users will now see the lead time value as 'Stocked Item', if the lead time is zero.

Ducted Systems Storefront

- Product Comparison allows a user select products and compare them against other products.
- Pricing and Availability are now shown on the Product List Page.
- Products can now be selected and deleted in the mini cart to save time.
- The Lead-time indicator (A, B, C, etc.) now shows at the line item level in the Cart, Order Review, Order Confirmation, Order Detail, & Change Order pages.
- A new option to "Select all Items for Current Seller" has been added to the Cart screen.
- Order History Page now has the option to export the screen to an excel file.
- The user information section in the checkout process now allows for a different shipping address to be entered for each seller.
- Order Line Items in Order change page and Order details page will now be displayed in the order of the line item #.

*Ducted Systems & Aftermarket (York and Frick) Storefronts – **Coming Soon!***

- 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.

Navigator® customer portal

Navigator Release Notes

Fixes

- Calendar date selection – User must click off the calendar after selecting a date for the selection to be saved.
 - Solution: Calendar hides after selection to avoid an extra click outside to remove it.
- Update Successful Message - Unnecessary Click
 - Solution: Removed the update message to avoid an extra click.
- Multiple active carts are being created
- DS storefront – Fixed an issue where in few versions of Internet explorer, we were noticing text over product images (Featured Products)
- DS storefront – Corrected issue where orders were being sent with Null Customer Number

KNOWN ISSUES and ENHANCEMENTS UNDER REVIEW

- None at this time

Selection Navigator

What's New?

Selection Navigator Platform

- Groups and Systems can now be re-ordered in the Estimate Navigation Tree.
- Performance improvements made to document generation.

BSNA

- Custom labor tasks can now be added, copied and removed at the system level.
- Extended List Price column has been added to the Products Grid.
- Opportunities are not created when a new Selection Navigator project is created.

Air Distribution Products

- You can now export to Excel from all grids in the selector.
- Filter wizard has been added to present the models that can deliver the required performance.
- PennBarry freight quotes may be required or requested based upon models and options selected.
- Account info is used to populate "Sold To" fields on the order report.
- Pressing Enter will now trigger Search in the Selection Tab.

Controls

- Presentation of Buy American options have been refined.
- Individual products can be marked as active or inactive. Inactive products are not included in Estimate Summaries or Documents.
- Phased out products can be priced.



Navigator® customer portal

Navigator Release Notes

- When editing Typicals, accessories are loaded for parent item in the Selector.

Ducted Systems - Unitary

- Models with Mod Shop Options cannot have pricing updated, a popup message will be presented.
- Mixed Air has been added to the Residential Split performance screen.
- Submittal document can now be created in MS Word format.
- Special Quote information now included on orders.
- Discount value on Estimate limited to values between -99.9 and 0.

Ducted Systems – Applied Rooftops - Premier

- Related child items are updated when the parent's quantity is updated.
- Canadian or USD currency supported in Quote and other reports consistent with other products.
- ERW data updated on Performance Report.
- Special Quote now can be seen on pricing report and pricing dialog.
- User is notified when an existing configuration is opened that has multiple warranties.

Ducted Systems – Applied Rooftops – S100/OmniElite/YPAL

- Multiple orders are consolidated before sending to ordering system.
- Users can now view and download tools from within the Selection tool.
- Submittal packages now exist for S100/TM/York YPAL configurations.
- Date column in Products Grid will now show the last modified date for the line item.
- Seismic option now shows in the guide specifications.
- DS Equipment Defaults specified in Project Settings will be used for new selections.

Fire Detection Products

- Added new Active Shooter Response System product selector.
- Canadian pricing has been made available.
- Accessories not available to customer are filtered from selection.
- Modified By field is now updated on the Special Pricing Workflow.

Fixes

Selection Navigator Platform

- Corrected issues with Project Copy where “access denied” message was displayed, and project was not copied.
- Corrected issues when creating MS Word version of Warmup Letter.
- Grid now displays correctly after Mount Type is selected.
- Special Pricing grid no longer display NaN when product price is zero.
- User Defined Products are now properly exported so that leading zeros and other formats are preserved.

Navigator® customer portal

Navigator Release Notes

Air Distribution Products

- Corrected issues with Dynamic Submittal and tags.
- Pricing Summary report totals corrected.
- Order Report failures fixed.
- Estimate Grid now shows the correct NetPrice on Air Distribution View.
- Corrected validation issues for DIBD2 with round transition
- Failed variables are now shown in Red on Configuration Tab.
- Can now arrow past unavailable options.
- Model checkbox is now checked when user adds model to Product Selection Summary Tab.

BSNA

- Update Document action now successfully updates documents when creating a document package.
- Correct list of project profiles displayed for Sales Influencers under a BSNA Account.

Controls

- SST Drawing Tab is now resized to display the entire drawing.
- Valve selector no longer is rounding CV values in candidate grid.
- Corrected issues where text values appear as numbers in product selector.
- Parent item of Valve is no longer stuck on budget.
- Fixed issues with Product Name formatting.

Ducted Systems - Unitary

- Direct entry of VRF/DFS products are now categorized correctly in the Estimate Summary.
- Corrected issues where static values were not set properly when using Direct Entry.
- Brand filtering now works the same in Direct Entry as in Add Products.
- Heat Pump Performance section now shows on Submittal Document for Commercial Split Heat Pumps.
- Formatting adjusted on Control Guide Specification document.
- Unit Tags properly saved when ERV line items are saved or when changing a unit between Indoor and Outdoor.
- Mixed Air values do not change when selected or unselected.
- Child Accessories are now properly associated to the selected Accessory.

Ducted Systems – Premier Applied Rooftops

- Corrected Submittal report issues when generating MS Word version.
- Documents cannot be generated unless the configuration status is complete and valid.
- Dual Point Power is now shown on the Performance Report.
- Factory options now properly aligns with the model number.

Ducted Systems – S100/OmniElite/YPAL Applied Rooftops

- Specification text is now shown for belt guard.

Navigator® customer portal

Navigator Release Notes

- Non-default values now appear on the How Water Coil Performance Report.
- DDP Fan wording is now included in the Specification Text.
- Final Filter rack now only shows when expected in the Specification Text.
- YPAL2 now always shows BACnet MSTP option selected.
- YPAL model not shown on the TempMatser unit.
- PCAT totals and startup days now properly updated and displayed.
- Corrected issue when selecting DDP fan for YPAL2_14.

Fire Detection

- Phone Number field can now accept a format of (XXX) XXX-XXX.

KNOWN ISSUES and ENHANCEMENTS UNDER REVIEW

- BSNA Electrical Budgeting Estimate
- BSNA Document Packaging and Document Generation

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 / 844-319-0726.