

Navigator® customer portal

Navigator Release Notes

Release Date: May 20, 2019

The following remedies and enhancements are included in the Navigator release dated May 20, 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?

- Administration - Change Password Options is available under User Profile
- Delegated Administrator – Contacts created under Tier 3 Accounts, will restrict creation of a Navigator login.
- New Marketing Dashboard application available in Navigator
 - The Marketing Dashboard application will link directly to Channel Fusion from Navigator and replace the following UPG Marketing functions/applications
 - Dealer Registration
 - FIM – Consumer Rebate Claiming
 - FIM – Promotional Financing Claiming
 - FIM – Spiffs Claiming
 - FIM Reporting
 - FIM Rebate Claims Report
 - FIM Dealer Spiffs Report
 - FIM Administration
 - Dealer Billing Report
 - Dealer Detail Report
 - Dealer Registration Details
 - Dealer Registration Forms
 - Funds Action Center
 - The Marketing Dashboard application will be available under the Marketing set of applications
- Creating new dealers that will be setup for Marketing should be done through Navigator -> Manage Accounts

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- Dealer account information can then be passed to Channel Fusion to complete the marketing registration using the 'Register for Marketing' button on the Navigator account
- The Offering Catalog has been rewritten to support performance/speed improvements.
 - Speed increases across application
 - Eliminated poor messaging on dead ends where no product was found.
 - Added Instantaneous Filtering when selecting a filter option
 - Updated search functionality

Fixes

- Delegated Administrators are able to add Tier 2 Accounts, without brand assignment
 - Solution: Delegated administrators will now be directed to the brand assignment screen
- Corrected issue so if you select a notification and click the down arrow, your menu preferences are displayed.
- Fixed issue with Offering Catalog Attribute Data

KNOWN ISSUES UNDER REVIEW

- Having issues with search returning the best results first. Team is currently investigating the issue.

Order Navigator

What's New?

Order Navigator Platform

- System Performance – We have implemented optimization guidelines to improve the performance on the Check-out/ Order confirmation pages.
- User Friendly Error Messages – As part of an ongoing exercise we are refining the error messages so the user understands what went wrong and what action needs to be taken to resolve the error message.

In this release we have refined error messages in the following scenarios:

- Cart Validations
- Order Shipping Address/ Shipment updates
- Product Search
- Mass Upload Success/ Failure scenarios

Controls Storefront

- Users will now be required to click 'Update' on the quote screen before clicking Checkout to account for any price changes that may have taken place.
- Brand Level Entitlements are enabled on Controls Storefront similar to DS Storefront. Customers will now access only the products they have permissions to.



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York Storefront

- Quotes entered in Lawson manually will now be available in York storefront as quotes in the cart of the respective user

Ducted Systems Storefront

- Order History/My Orders table manage notification pop up window will show the recipient email and notification status as set from the My Accounts Page. User can set the notification preference per line order. User can add and edit up to two additional email addresses for notifications.
- Users will now be able to track shipment details on Order completion (Partial Shipped or Completed) from Order History/My Orders table by clicking on 'Track' button.
- Product Details Pages has multiple updates to make availability information clear.
 - a. Remove Lead Time, Estimated Delivery Date
 - b. Added additional notes to the users which displays in red
 - c. Traffic light – show green (Available Quantity > 0) and yellow status (Available Quantity =0 or blank)
- Display Fees in the checkout cart, order review page, my orders/change order page and order confirmation page. Following are the fees details:
 - a. Air Freight - \$75
 - b. Coordinated Delivery - \$500
 - c. Partial Truckload - \$300
 - d. Please note fees due to minimum orders or freight types will be shown at the time of invoicing only and are not added to the cart subtotal.
- New option has been added in Order History to search by Pooled Orders

Ducted Systems Storefront – 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 has been 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

Ducted Systems Storefront

- User is not allowed to change certain line items in Change Order screen
 - Solution: Added messages to notify the user why changes cannot be made to certain line items
- When a Change Order takes place and there is an error, no message is shown to the user
 - Solution: Message will appear and advise user to contact Customer Service
- Order Ship Status report is not showing all of the columns the legacy version showed
 - Solution: Missing and additional columns have been added to improve the report
- In Change Order, when the brand is changed it is not being reflected in the order
 - Solution: Brand change will be reflected in order.
- User was allowed to enter a ship to address without a name for the order
 - Solution: Name field is now required to place an order

KNOWN ISSUES and ENHANCEMENTS UNDER REVIEW

Ducted Systems Storefront

- Show previous and next buttons on the product list page are not appearing

Selection Navigator

What's New?

Selection Navigator Platform

- The Project Number is included in the header of SharePoint project along with the project name.
- User is now able to sort status column on Systems tab of Estimate Details screen.
- Display currency will default to the currency of the estimate.
- User Defined Products now support a designation independent from the part number.
- Navigation icons in the project list and page header are displayed consistently.

BSNA

- BSNA users can now estimate in List Price mode. When in List Price mode, products will be saved with list prices. Product Views, Labor, External Costs, Estimate Summary, and Metrics will show List Price only. Major Projects and Control Projects are able to switch between Standard and List Price Mode. There is a new Change Order Request document that only displays list prices.
- Estimate level task hours are recalculated based on project cost changes to reflect changes to project management hours expected.
- Cost Summary section now available at the group and system level.
- External Costs can now be added at the Group Level.

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- Summary of costs can now be seen at the Group and System Level.
- Mechanical fitter hours (cc205) can now be added to the estimate
- Improved System standard score when system includes typical.
- Added new BSNA document templates for generation from SharePoint including:
 - Defense Priority Form.docx
 - Equipment Acceptance Procedure Letter.docx (revised)
 - Equipment Release to Operations Meeting Checklist.docx
 - Purchase Order Discrepancy Resolution.docx (revised)
 - Service Warranty Notification Letter.docx
 - Startup Procedure Notification Letter.docx (revised)
 - Release to Operations Checklist (revised)
 - Subcontract RFP no Ts and Cs Conventional.docx (revised)
 - Mockup Checklist.docx
 - Change Order Request.xlsx

Air Distribution Products

- PennBarry reps can now generate a quick submittal report with XML data showing detailed information about the candidate.
- PennBarry fan data can be seen on the Dynamic Submittal.
- Energy Usage report enhanced with additional labels and tagset.
- Default line tags are removed when generating documents.
- Special discount information is viewable on the Release Report.
- Selection Navigator version displayed on Dynamic Submittal report.
- Implemented quick Submittal Report with ability to view and print.
- PennBarry Quick Submittal report now defaults to portrait mode.
- Quick Submittal details will include the calculated pitch.
- When no freight charges are present, a warning will be displayed when the save button is pressed.
- Implemented PennBarry freight to support job level and line item rates.
- Release information can be seen on the estimate grid without opening the product configurator.
- Ruskin user can select "Special Express" for orders.
- Enhancements to Material Order Grid for improved efficiency.
- Correct arrangements are enabled and disabled based on the drive type selected.
- User can specify markups for line items - sell price and profit are recalculated at line and total level.
- When the user edits a product with required selections, the selection tab will be loaded.
- Able to cross reference competitor models for selection and competitor notes.
- PennBarry candidate selection maps options to the line item when selected.
- Selection tab validation works the same as configuration grids.
- FS Construction and FS Accessories are not displayed in the product configuration for selection required line items.
- Products can now be copied to different projects even when selections are still needed.

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- Implemented duplicate and add line item logic to properly handle selection required line items.
- When performance related option is clicked, the respective line item is highlighted on the selection tab.

Air Handling Units

- Product literature cut sheets available to user in a single file.
- Performance report now includes fan curve data and notes on fan block.
- Performance report will now support multiple electric heat segments.
- Performance report will now support multiple air blender segments.
- Performance report will now support multiple heat wheel segments.
- Performance report will now support multiple integral face and bypass coil segments.

Controls

- Standard flag will only be changed when important attributes are updated.
- Performance improvements to tree updates

Ducted Systems - Unitary

- Consolidated schedules so that Commercial Split and Commercial Package are in the same document.
- Manufactures Specifications document no longer available.
- Added Project Name to SAP orders.
- Character restrictions removed from order details "Postal Code" field.
- Added support for Mod Shop orders. User and Norman Mod Shop will receive an email notification.
- When a line item has Mod Shop options, Update Prices action will not modify the price for the line item and a message will display indicating the price cannot be updated.
- Commercial Products will utilize Catalog Pricing for MLP if model exists in Catalog, otherwise the VC MLP will be used.
- Phase Monitor default project setting added.
- Commercial Split default flow rate is set to 30 GPM.
- VRF/DFS items from PiApps need to also display in the DFS & VRF Products view in Estimate Grid.

Ducted Systems – Applied Rooftops - Premier

- Premier supplemental drawings are included as images on Submittal Report to improve document creation time.
- Increased the time allowed for generation of the Submittal Document to accommodate submittals with up to 25 Premier units.
- OA air opening descriptions now properly listed on the Internal Pricing Report.
- Premier product is now included in the UPG Guide Specification Summary Page.
- Corrected issues with Outdoor Sound Power levels for 40T and 50T units. This will result in lower sound power levels.
- Added tool tips to explain why options are not selectable.
- Premier configuration options updated with new VTZ file.

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- Recovery Wheel Min CFM values updated.
- HGRH defaults updated to 85 ambient, with entering of 75 dry bulb, and 67 wet bulb.
- Improved performance of generating Supplemental and Dunnage reports through use of image meta data and concurrent threads

Ducted Systems – Applied Rooftops – S100/OmniElite/YPAL

- S100 units are now validated prior to booking and ordering to avoid invalid units getting booked or ordered.

Fire Detection Products

- Fire Detection documents updated to support Canadian dollars.
- Canadian Simplex price book loaded for selection of Fire Detection products in Canadian dollars.

Fixes

BSNA

- Corrected issue with deleting a group in delivery mode
- Documents are no longer created in the root folder but are created in the proper folder.
- Create Documents and Update Documents buttons are no longer displayed for Read Only users.
- Document drawing numbers are now updated after adding new drawing number and selecting Update Document.
- Update Document functionality from SharePoint, now correctly updates document.
- When the point schedule is included in a package, updated so that only the first page is included in the package.
- When estimate is locked, the tool tip help now correctly displays state as locked.
- Tool tips now turn off properly when entering external costs.
- Branch Team Member role for a contact is no longer required to be unique.
- BSNA users are able to search across all accounts when adding a team member.
- User Defined Products are now displayed on Quote, Sales Order and Submittal documents for BSNA users.

Selection Navigator Platform

- When confirming the deletion of an order when the order name is blank, the Order Reference Number will display and when that is also blank the order system will be displayed.
- Corrected issue where "spinner" does not display centered on the products grid when the rows extend beyond the limit of the screen.
- Brands available for product selection corrected so that brands are determined based on the account of the project.
- Corrected issue on project details page where a "dereference null object" message was displayed due to invalid document template records.
- Locked estimates can now be copied.

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- Filtering by status on the Special Request tab has been corrected.
- Corrected issue when importing a contact from a vCard created from Outlook 2013.
- Project Owner when editing a team member can ALWAYS change them to a Project Owner.
- When team members are added to a project, the default role is now Read/Write.
- Corrected issue where an Insert failure results when creating a large number of projects simultaneously.
- User Defined Products are now properly saved unique by account, vendor and SKU.

Ducted Systems - Unitary

- UPG Special Price Requests will no longer accept a negative value number in the phone number field.
- Commercial Splits|Saturated Suction Temp no longer missing on Submittal document.
- Schedule and Specs documents should not be available for User Defined Products.
- Corrected issue with incorrect factory cost when order line items are deleted.
- When Update Price is requested for a commercial package with a Mod Shop Option, information popup displays correct message.
- When Mod Shop options are added model will properly save with all pricing details.
- Corrected issue where York options are displayed for Coleman commercial split units.

Ducted Systems – Premier Applied Rooftops

- Corrected Sequence of Numbering issue in Word version of Control Guide and Spec Text Documents.
- Warranties now show properly on the Pricing report.
- Extended warranty properly shown in all documents no matter if only the unit is selected when navigating to document generation or all line items are selected.
- Corrected issues with Word version of Spec text document to match PDF version.
- If user selects Gold or Platinum authorized contractor on the PCAT screen, selection will now add the 6 months labor for Gold and 12 months for Platinum free of charge.
- Users will be notified if a selection is incomplete and an event log will be displayed with details.
- Corrected issue allowing selection of incorrect warranty options.

Ducted Systems – S100/OmniElite/YPAL Applied Rooftops

- Corrected file names within the Order Package for Series 100.

Fire Detection

- Purchase Order document should be attached to all order emails.
- When product has a price of zero, the discount column will show zero instead of NaN.
- Should be able to add all products from direct entry from Fire Detection BOM view.
- Product quantity field now correctly limited to -99 to 999.
- When an incorrect file is selected for importing from FASTool, a warning message will now be displayed.
- Corrected issue where the ordering system for controls User Defined Products were being set to fire detection ordering system for BSNA users.

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Special Discount Administration

- Updated Word version of Spec text document to match formatting of PDF version.
- Corrected issue where the minimum SDA price validation is not run when quantity is greater than one.
- Changed column "SPR Number" to "SDA Number" on the Special Pricing Admin screen.

KNOWN ISSUES and ENHANCEMENTS UNDER REVIEW

- Ability to re-order estimates and groups in the estimate navigation tree.
- BSNA Electrical Budgeting Estimate

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.