

Navigator® customer portal

Navigator Release Notes

Release Date: November 18, 2019

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

Portal & Offerings Catalog

What's New?

- Extend Save and Sync functionality on Navigator's My Profile to include First Name and Last Name.
- Address validations are performed as follows:
 - Zip code validations will be enforced if the country is US or Canada.
 - Phone Number validations to exclude alphabets (ability to save a 10 digit number with dashes in between, i.e., xxx-xxx-xxxx)
 - State validations to check if it belongs to the country
- Removed unused fields from view on Tier 1/Tier 2 accounts page.
- Increased markup field value for Tier 2 Sub Accounts.
- In case of batch job failure, notifications now sent to Run Team.
- Modified banner to reduce white space.
- Quote Status and Quote Management WDA apps were updated for claim back IPAs.
- Price List now allows requesting a Price List for up to 15 SAP CustIDs.
- SAP IPA request API now includes IPA Type and Job Type.

Fixes

- If "Bill To" information is not populated for an account, the account cannot be retrieved.
 - Fix: Information about account is returned even when the "Bill To" information is not populated.
- User cannot switch accounts if they have more than 50,000 records (accounts x applications).
 - Fix: Limitation on the number of records has been removed.

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- There is a mismatch between Contact, Navigator Contact, and Salesforce User Record for Address First Name and Last Name.
 - Fix: Records now match.
- Favorites and Notifications drop down is not functioning correctly in IE 11.
 - Fix: Corrected to work in IE 11.
- Minor issues with SAP IDoc update from October.
 - Fix: Corrections made.
- Fixed Guest User document access issue in Offering Catalog
- Fixed issue with Opening and Closing of Offering Catalog Sections
- Fixed issue with Show More / Show Less button in Offering Catalog

Order Navigator

What's New?

Order Navigator Platform

- Added ability to delete all selection in mini cart for all Storefronts.
- Improved error messages displayed in carts.

Controls Storefront

- Updated banner ads to target customer's SelNav Customer Type.

Ducted Systems Storefront

- Shopping Cart shows fees per seller now. Airfreight charges will show only for S1 Seller and Ship complete and coordinated delivery fees will show in DS Seller Tab.
- Added message on Order History when no results found - "No results found matching search criteria".
- Storefront name is hyperlinked to navigate back to Order Home Page.
- DS Seller: Blocked status changed to not orderable status.
- Added mandatory fields to Change Order Screen in Billing and Shipping Information.
- Added ABC indicator on Product List Page.
- Added Logistic Planning status to Order History page.
- Removed Add to cart and add to template button for DS Seller if ABC indicator is D.
- Residential and Commercial fees will show on Order Review and Confirmation pages as well.
- Implemented a condensed order view for large orders.
- When entering address information on a multi-tab order, addresses are not automatically copied to all tabs.
- When performing address validation in the Address Book, default now set to "Use Selected Address" instead of "Use Original Address".
- Added "Attention To" fields in My Account Address Book.

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- Added notification in the event a substitution is made between placing the order and shipping the order.

Fixes

Ducted Systems Storefront

- When attempting to cancel a delivered order, interface shows “Cancel Submitted” when that is not permitted.
 - Fix: User now will see an error message.
- Cancel “X” button in Address book not centered.
 - Fix: “X” button is now centered.
- When using the “Back” button, fields are reset when there are multiple tabs.
 - Fix: Fields are now maintained when use “Back” button.

York & Frick Storefronts

- GuestUser - Delete button next to Update Cart button is not working
 - Fix: Corrected Delete button for Guest Users.

Selection Navigator

What’s New?

Selection Navigator Platform

- The Project List has been enhanced to support loading a larger number of projects. While this will correct issues for many users, additional changes are still in progress and will be seen in a future release.
- When an estimate has a Navigation Tree, documents will now print with systems listed in the order of the systems in the Navigation Tree. Reordering systems in the tree will affect the order of the systems in documents.
- User changes to product grids (columns shown and order) now properly handle changes in views so that all available columns can be properly displayed.
- Continued improvements to facilitate keyboard navigation, including use of space bar to open the Ship To Panel on Common Order dialog.

BSNA

- Initial Release of EBE: Electrical Budgeting Estimate is the replacement for the EBT Spreadsheet tool. It is embedded in Selection Navigator and uses the current system components to estimate the installation cost for the selected products. Both tools will be available while we add additional features to EBE.
- New version of document templates uploaded (Subcontract RFP no Ts and Cs Conventional.docx, Scope of Work.docx)

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- A new package status column exists in SharePoint repository so the status of document packages can be seen. (In Progress, Success, Failure)
- Added additional Mark Shipment lines for an AOMS order so that more details can be included with the order.

Air Distribution Products

- Special product quotes can be added by selecting “Other” in option dropdowns. This allows for identifying the option and pricing.
- Users can now save changes within the configurator without exiting the configurator.
- When Special Value details dialog is closed, the user is now prompted with option to save the changes.
- Enabled keyboard navigation on Tag Set dialog.

Ducted Systems - Unitary Series

- Reports tab added to configurators allowing the creation of schedule and submittal documents without leaving the configurator.
- Order details screen now requires selection from allowed list when country is USA or Canada. User can manually enter a value when not in USA or Canada.
- When there is an approved IPA for a unit, the model tab is now read only. User will be notified of the read only status if they try change the model number or Mod Shop options.
- Added Named Purchase Order and Quote Type fields to be used with IPA special pricing requests.
- Max Fuse Size added as a column in the candidate grid of the Selection Wizard.

Ducted Systems - Applied Rooftops - S100/OmniElite/YPAL

- Unit tag is added to the spec text report so that it can be connected to a unit when multiple spec text reports are included in a submittal.
- PCAT pricing for 2020 is now available for selection.
- Updated submittal report headers to be consistent across all documents.

Ducted Systems – Applied Rooftops - Premier

- Warning messages changed to consistently use the same warning icon (yellow exclamation mark).
- PCAT and other child items cannot be deleted from the products grid. User must now make changes within selector to remove PCAT and child items.
- Extended the size of the help text available within the selector.
- When rating a unit that requires a Fan Motor greater than 25HP will display a message when the 65kA SCCR is selected indicating that 208-230V option is not available.
- Return and Exhaust Fan Static Pressure on Performance Sheet reflect the Total Static Pressure in lieu of the Exhaust Fan ESP.

Fire Detection Products

- New Conventional Zone-IDC Configurator has been added that enables users to design conventional initiating device circuits.
- Cable calculation report added for Conventional Zone-IDC configurator.

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Fixes

Selection Navigator Platform

- When searching for a selector in the Available Products dialog, selectors in collapsed categories will now be found; category will expand allowing selector to be chosen.
- No longer need to press lock on estimate twice to lock the estimate.
- When an order is canceled, items that were previously un-editable can now be edited.
- Now correctly handle the editability of line items on an order through the order cancellation process. Until the order has been confirmed as canceled, line items cannot be edited. When the order is canceled, line items can no longer be added.
- Quote and Sales Order templates can now be deleted from Upload Tab within Account Preferences.
- Corrected issue where Account Preferences not properly saved.
- Corrected issue with Previewing documents in a Salesforce document repository. This would occur if a user made changes to the order of columns in the document list grid. After previewing the document, the user is no longer taken to the first project where the column order had been changed.

BSNA

- CMS Project Profile created in prior release is now selectable by users.
- Corrected error preventing editing a custom labor task after deleting the previous custom task.
- Financial Account Preferences are now properly seen when creating a new project. This includes Controls Freight %, Use Tax %, Warranty %, and Estimate Margin.
- Project Support removed as choice for a Custom Task at the Estimate level. Previously could be added but was not included in any totals.
- Addressed issue where the cost of an item on an order changes as the location in the Navigation Tree changes.
- Estimating Mode (Cost or List) selection no longer displayed on top of tabs in Estimate Details.
- Locked items in Estimate Details no longer prevents items from being edited in Delivery.
- When a custom task exists at the estimate level, changing the project duration no longer adjusts the hours per task.
- Corrected issue where documents would not be available for selection when building a document package from within some projects.
- Corrected issues where documents are created in root folder for projects created by October 21, 2019.
- Corrected issue where a document package could not be edited.
- Corrected issue where product literature documents not saved to SharePoint repository.
- Tag Lists for AOMS orders are now properly saved when edited.

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Air Distribution Products

- Corrected issues with document generation or document preview for Air Systems products within Create Documents page.
- *Controls*
- AFMS Schedule now correctly calculates area of the duct based on height, width and unit of measure.
- *Ducted Systems - Unitary*
- When changing the matchup for a Residential Split unit, the new qty for units is now set to one, replacing any previously entered quantity.
- Corrected issue where the Extended Sale Price is incorrectly multiplies the sales price by both the quantity and extended quantity.
- When an order is created and a unit is added, all child items associated with the unit should be pulled into the order including the roof curb.
- Heating OD Dry Bulb temperature is now properly displayed on submittal documents for Residential Heat Pumps.
- User entered Reheat Input Conditions now properly displayed on submittal documents instead of default values.
- Residential Split accessories are no longer duplicated on Submittal reports when the Elec Heat w/o Circ Brkr section (S1-6HK06500206) or Electrical section (S1-2LA04701024) have been added.
- Can now set the Outdoor Air CFM in Mixed Air Section after editing any Commercial Package unit.
- When changing outdoor to 30 Tons, options that are no longer valid will not be included in the product. This includes Phase Monitor and CUS Installed Intellispeed options.
- Corrected issues where ERVs added to a Commercial Package are not saved. Once an ERV has been added, user is now unable to add another ERV.
- ERV section no longer displayed on submittal report after it has been removed from a Commercial Package.

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.

