

Navigator® customer portal

Navigator Release Notes

Release Date: October 21, 2019

The following remedies and enhancements are included in the Navigator release dated October 21, 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?

- Added ability to display more than one critical update message on home page without need to scroll.
- Added ERP Bill-To Names for ASC Brands: Envirco, York - Chilled Beams, and York – Fans.
- Added record type, to provide ability to distinguish between Tier 2 and Tier 3 accounts in Salesforce.
- Improved error message to clarify cannot enter new password that is same as previous three passwords.
- Delegated Administrators now have extended access under Manage Account menu to SelNav Application Data
- Images can now be included in Notifications / Message Center.
- Implemented User Interface updates for "Switch Account" function.
- Validate "Bill To" by Account ID rather than Name.
- Added "breadcrumb" navigation to all areas of Navigator to assist users in learning and navigating site.

Fixes

- Corrected insufficient permissions on System Administrator API Profile.
- Updated Offering Catalog to Support IE11, Edge, and Firefox
- Fixed Expand All and Collapse All functions for Offering Catalog Filters
- Added support for linking over 100 documents associated with a Product Model
- Fixed OC Escalation Notices from being sent out inadvertently.
- Corrected insufficient permissions when trying to use OC Catalog Sort

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KNOWN ISSUES UNDER REVIEW

- Show More and Show Less Button not working properly
- Cannot access the individual storefronts under My Cart unless you hover directly in the center of the URL
- There is a warning message in IE that comes up regarding unsecure content and it is displaying on several pages

Order Navigator

What's New?

Order Navigator Platform

- Improved error messages displayed if enter invalid product code.

Controls Storefront

- Added the ability to enter a one-time collect account to use for shipping on order.
- Bulk upload now includes ability to add tag description and tag quantity.
- When users are near free shipping threshold, a message will appear to notify them.
- Clarify error messages when bulk upload fails.
- Re-validate coupon after changes are made in the cart.
- Added Canadian Customer Service contact information.

York Chiller Storefront

- Added capability to offer discount when a particular product is purchased and user provides promotional code.

York & Frick Storefronts

- Added Purchase Order information to the confirmation page when paying by credit card.

Ducted Systems Storefront

- The partial truckload fees is not charged for orders that meet the minimum criteria.
- Added validation for Shipping Address on Change Order Screen.
- For Source 1 sellers, added fields for status and long description to Product Detail Page.
- Added Open Summary link to Order History page.
- Added No Substitution check box on the cart screen, split orders, Order Review, Order Confirmation and Order History pages.
- When a superseded item is detected in cart, it will be marked as canceled and message will display and identify the replacement item on line below with the same quantity.
- Ability to display featured products for only brands user has access to.
- Tailor banner ads to brands user has access to.

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- Limit address field to 35 characters to match ERP limitation.
- Added ability to Save Cart all the way up to Confirmation Page.
- Country code for shipping address will default to country code of active account address.
- Once Bill-to information is added, it is saved until the order is placed.
- Brand selector is limited to brands available to user.
- Field labels are now displayed in Address Book.

Fixes:

Order Navigator Platform

- Corrected view for Tier 1 and 2 users with no access to Order Navigator or Order Center so they cannot add items to cart.
- Populated the Attn To fields so they do not appear blank on Order Review, Confirmation, and Details Page.
- Applied updates to support IE so users are able to View Cart.
- Fixed Brand Selector widget so it closes when click on Save button.

Ducted Systems Storefront

- Corrected Trade Show Order Flag so it synchs when Order Review page is modified.
- Updates made to support IE so the Brand picklist, Delivery Date, and Shipping information picklist display now.

York & Frick Storefronts

- Corrected the Delete button next to Update Cart button so it works for Guest Users.

Selection Navigator

What's New?

Selection Navigator Platform

- The Project Name is now a link on the Project List that will navigate directly to the estimate details page.
- Inactive products cannot be added to orders.
- Orders will now be displayed in the same currency as the estimate.
- Several changes have been made to the product selection dialog. The product categories can now be re-ordered. You can now search for product selectors by typing the first few characters of the selector's title and only matching selectors will be shown.
- Continued work to improve keyboard navigation and data entry efficiencies throughout the Selection Navigator user interface. These changes include deliberately setting the first tab on the page and defining the tab order of fields to make navigation and data entry most efficient.

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- Changes made to grids within Selection Navigator will now be retained when you return to the same grid. This includes columns shown, order of columns and number of records to display. Additionally, some grids will retain the last sort order selected.
- Styling changes are being made to improve usability, presentation and consistency.

BSNA

- Navigation buttons have been added to the SharePoint repository so that all navigation options are readily available.
- Documents created from a user defined folder will now be placed in the user defined folder instead of the root directory.
- SharePoint document repositories limit access to added Team Members, not including additional default groups.
- A separate folder for Document Packages now exists making it easier to distinguish between documents and packages.
- Help icon added to Project Documents (SharePoint) will take the user to the appropriate help section for documents.

Air Distribution Products

- Special Options can be added with a price when configuring line items.
- The Standard Marketing Program is now the default choice.
- When entering each grid, the first editable cell will now have focus for quicker data entry and navigation.
- When the Customer Pickup option is selected for shipping, a non-editable address is added which communicates to other systems that this shipment is for pickup.
- Proposal documents have been added that include a cover page, supports different groupings and includes sell price for groups and Total Sell Price.
- Dynamic Submittals now use the name of the user instead of their email address as the Preparer.
- Reports no longer include options of "None" so reports are cleaner and easier to read.

Controls

- System Selection Tool database has updated with most current data so that current versions of controllers and other products are present and available for selection.

Ducted Systems - Unitary

- When working on a Special Price Request, user now limited to changing the Total Gross Margin and Total Sell Price. The Buy Price cannot be changed.
- Documents attached to a Special Price Request will now be sent via email to the appropriate Ducted Systems pricing team. The subject will read:
 - Special Pricing Request attachment has been added by Project Owner = (*Project Owner*), regarding Project Name = (*Project Name*),
- Material Number column has been added to the Ducted Systems product view to assist in cross-referencing details in SAP.
- The Country Code is now validated on Common Order Information. This helps ensure a valid address is entered avoiding the order being seen as incomplete.
- When a reference number is not returned by SAP when submitting an order, a message will be displayed in its place: "Address Error - Contact Customer Service Rep".

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- Display Matchup Grid can be displayed within the residential split configurator. From the Model Tab, a list of options is presented allowing a user to more easily view, filter and select a unit.
- Updated Selection Wizard to include updated heating match logic that compares heat size from wizard conditions to mbh output options.
- Updates have been made to the Choice Guide Specification.
- User can override AHRI values in Project Settings that will be used as defaults inside product selectors.

Ducted Systems - Applied Rooftops - S100/OmniElite/YPAL

- Updated price summary report with more information including: Revision Number, Product Code, Branch Transfer Pricing and more.

Ducted Systems – Applied Rooftops - Premier

- The quantity of RTUs can now be updated when configuring the RTU.
- Added Glycol rating for optional hot water coils.
- Optional factory installed Advance Display with Multi-Touch Capacitive Touchscreen now available under Unit Display Control Options.
- User will be notified of available disconnect options. Updated rules for Disconnect Availability.
- Updated content for full points list and other controls documents.
- Updates to reflect the latest version of UL-60335 (new version of UL 1995) which can have an impact on amperage. Units that have been impacted by these changes will see updates to the MCA and/or MOP values. For the corrected values a Premier re-rate will need to be made in Selection Navigator.
- Updated warranty language include clarification on Stainless Steel Gas Heat Exchanger and warranty start date.
- Fan Curve reports will identify the fan in the segment (SEG) block whenever an Exhaust or Return Fan is selected on the unit.
- Cleanup of order status and quantity changes.
- Updated Startup Documents.

Fire Detection Products

- When creating a new project, users will have the option to select a new “Fire Detection System” Profile which will provide a new “Systems Tab” in the Estimate Details screen.
- The following panels can be selected when adding a system:
 - 4007ES Hybrid
 - 4007ES IDNAC
 - 4010ES with Conventional NACs
 - 4010ES with IDNAC
 - IDNAC Repeater
 - 4009 NAC Extender
- The following circuits can be selected when adding a system:
 - Addressable IDNAC
 - Conventional NAC

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- System Reports - When you create and save a system there will be a System Report available in the Project Documents section for each system created. If the system is a Panel, NAC Extender or IDNAC repeater the report will be a Battery Calculation Report. If the System is a circuit such as an IDNAC or Conventional NAC the report will be a cable calculation report. We have completed the System reports (battery calculation reports) for the above panels. We plan to have the cable reports completed for the IDNAC and Conventional NACs in the following release.

Fixes

Selection Navigator Platform

- Corrected issues when a Tier 1 user, copies a project from a Tier 2 project to a different project profile.
- When an order is removed, the line items that were included are now free to be added to a different order.

BSNA

- Corrected issues related to deleting the first estimate in a project that has multiple estimates.
- Booking estimates in Canadian Dollars no longer has rounding differences between the estimate and booking details.
- When we create the package, all documents in the package should be included.
- If there are any errors when creating a document package, the error are logged in the Error Details of the package so that the user knows, one or more documents are missing in the package.
- When a SharePoint document repository is completed, the screen will no longer refresh, avoiding the potential loss of selection details.
- Updates to handle large files that are uploaded into SharePoint. This avoids issues with duplicate files having machine name appended and missing meta-data.
- Update Labor Rate maintenance to ensure duplicate values cannot be entered. Uniqueness is enforced based on Locale Name, Resource and Effective Date.

Air Distribution Products

- Corrected issues with updating tag sets after changing quantity.

Controls

- SST items that were not appearing on the BOM report are now present.

Ducted Systems - Unitary

- Electrical Performance is not cleared when 1RD0410 accessory is selected.
- Corrected issue that prevents selection of 30 tons or greater for Commercial Split units.
- Corrected issue where heating performance is not populated for ZR090 units with 120mbh Gas Heat option.
- Corrected issue where the Outside Air CFM entered by the user reverts to zero when an economizer is added from the Model tab.

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- When a user enters a buy multiplier of zero, Update Prices action will now properly update all financial values for the item.

Ducted Systems - Applied Rooftops - S100/OmniElite/YPAL

- When a configuration has a quantity greater than 1, the dollars shouldn't show the total price in the line item in the CBS file. It should only show a single option price. CBS will do the math.
- Corrected issue where 120-150-DDP Supply Fan pricing was being doubled.
- Issue where Unit Tags with an ampersand (&) caused problems generating reports has been fixed.
- Corrected issues generating submittals when other types of products are selected.
- 120T and 130T Condenser Enclosure choices now properly maintain pricing.
- Updating the quantity in estimate details is now properly reflected in reports.
- Right Hand Drain Pan Connection is now properly maintained when reopening unit in the configurator.

Ducted Systems – Applied Rooftops - Premier

- Corrected issue where rating fails for Premier products within Selection Wizard.
- Corrected Hot water Heat output calculation when switching between water, glycol and back to water.
- Corrected issues with mass validation.
- PCAT and Warranty details are now copied with unit.
- Buy multiplier now properly copied Estimate Details when an IPA is approved.
- Updating Unit Tag of main unit now updates Unit Tag for child items.

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.