



# GUIDE TO SMART THERMOSTATS

2017 TRAINING GUIDE





## Installing Smart Thermostats

We wish to help the customer get a better understanding of their smart thermostat product. These customers may have never heard of the product until now or may already be extremely familiar with it. In both scenarios, HelloTech expects our technicians to deliver an exemplary experience for the customer from start to finish. Every home will be different so it is extremely important to make sure you grasp the concepts behind installing smart thermostat products before accepting these types of jobs.

### Pre-Appointment

When first contacting the customer to confirm date/time of appointment, as well as address, make sure to let the customer know they will need to have the following items readily available to have a successful install:

- Primary Users' email and password
- Compatible mobile devices where the smart thermostat app will be installed
- Wi-Fi name and password
- Smart thermostat Device(s)
- Ensure that the customer charges their device before the appointment if necessary.

## Thermostat Installation Checklist

- Ensure the customer has active wifi and the required devices.
- Verify the existing thermostat and HVAC unit currently works as expected.
- Shut off the power to the thermostat before performing any work.
- Remove the cover of the existing thermostat and take a picture.
- Check the compatibility tool to ensure the customer's device will work.
- Disconnect the wires from the old thermostat base and remove it.
- Install the new thermostat's base and begin connecting the wires.
- Attach the new thermostat face and turn the power back on.
- Walk through setup on the device and with the customer's smartphone app.
- Show the customer how to use their new smart thermostat.
- Box up the old parts in the new thermostat's box and give back to the customer.

## Smart Thermostat Installation Steps



- **Test the existing thermostat**

Use the customer's existing thermostat to ensure it is able to turn on its fan setting as well as air conditioning and/or heat. If it does not, please immediately contact the Tech Escalation Hotline.

- **Switch off the power**

It's important to switch off the power to avoid injury or damage to the HVAC unit or thermostat. You can double-check this by attempting to turn on the heat or AC on the old thermostat after turning off the appropriate breaker. The HVAC should be unresponsive.

- **Remove the cover of the existing thermostat**

Some thermostat covers are able to pull off, others may need to be unscrewed.

- **Take a picture of the existing wiring**

It's important to take a picture of the existing wiring to know what wire goes to which terminal.

## Smart Thermostat Installation Steps



- **Ensure Compatibility**

Each manufacturer has an easy-to-use compatibility tool for you to enter in the wires you see and to ensure the new thermostat will be compatible with the customer's HVAC system. Also be sure to note that high voltage wiring and stranded wires are not supported. You can note high voltage wiring if the thermostat is labeled as 120V or 240V or has thick wiring with wire nuts. Stranded wires have wiring that appears frayed or has strands in the unsheathed end.

- **Remove Jumper Wires and Label Remaining Wires**

Jumper wires are short wires between two connectors. If the old wiring has these, take them out and set them aside with the faceplate from the old thermostat. In many cases, the installation guide from the new smart thermostat will include label stickers for the wires. If they are present, use them to label the wiring.

## Smart Thermostat Installation Steps



- **Disconnect the wires and remove the baseplate from the wall**

Remove the wires from the old thermostat's wire harness and unscrew the base from the wall. Be sure to hold onto the wires so they do not fall into the wall as you do this process. Depending on the wires, you may be able to bend them outward to hold onto the wall or wrap them around a pen or pencil. Note any holes or other damage to the wall for the customer.

- **Install the Smart thermostat base**

Many smart thermostats include an optional trim plate. Always be sure to ask the customer their preference on using this. It may be more aesthetically pleasing or cover up previous holes or damage to the wall from the old thermostat. Pull the wires through the new base (and trim plate if applicable) and again, secure the wires by bending them or using the pen/pencil wrap method. Screw the base (and trim plate if applicable) to the wall using the provided screws. If the new base includes a built-in level, be sure to use this. If not, use a level to ensure proper alignment on the wall.

**NOTE:** It is not within our scope of work to repair damage left from the previous thermostat such as putting holes or doing touch-up paint.

## Smart Thermostat Installation Steps



- **Connect the wires into the new base**

After ensuring approximately 1 cm of exposed wire is present, insert each wire into the matching connector. Do not connect more than one wire to each terminal. Be sure that the wiring does not come out when you do a gentle tug. With the wiring hooked in, gently push excess length of wiring into the wall hole. This will ensure the new thermostat display will attach flush to the base.

- **Attach the new display**

Install the new smart thermostat display onto the base. Ensure it locks into place and will not come off the wall on its own.

- **Turn the power back on**

Now is the time to turn the power back on and ensure the new smart thermostat display comes to life. Please give it two to three minutes if the display does not immediately turn on before troubleshooting further.

- **Set up the new smart thermostat**

The thermostat will guide you through setup. Now is the time to configure the thermostat, connect it to the customer's wifi network and ensure it communicates with the app on their smartphone or tablet.



## General Guidance

Some customers will choose to remain distant and will want you to handle the setup and get them when the device is ready for the training portion. Use your best judgement to feel out the customer's personality and ask questions to help get definitive answers.

Make sure the installation of the new smart thermostat is clean and aesthetically pleasing. If you notice, for instance, that the previous hardware left aesthetic damage that isn't covered up by the new thermostat (and included backplate), you should recommend the customer purchase a larger backplate or recommend they use touch-up paint.

Once the customer's new smart thermostat system is installed and properly programmed, make sure to box up the customer's previous hardware in the smart thermostat packaging and give it to the customer. If any tools came with the thermostat, make sure those are left with the customer as well.



## Customer Training

Briefly show the customer how to use the smart thermostat's app functionality (if applicable). Many manufacturers such as Nest or Ecobee have an app that is designed to harmoniously integrate all of the product's setup and features into one, beautifully designed app on the customer's smart device. That being said, it is also important the customer's device is functional and compatible (iPhone, Android, or Windows Mobile).

## Appointment Wrap-up

After completing the setup and app training of the smart thermostat, ask the customer if they have any additional questions or need a quick review on how to use an app or feature. When marking these appointments complete via your tech app, be sure to leave as much detail as possible on how the job went. If you are unable to complete the job for any reason please submit a problem note and/or call the technician escalation line at (424) 209-4660. Do not mark any job complete unless the work was completed as expected by HelloTech and the customer.

**If you are unable to resolve the issue with the smart thermostat, it is imperative that you reinstall the customer's previous hardware before you leave.**



## Helpful Links to Commonly Installed Doorbells

### Nest Documentation

#### Nest Compatibility Guide

<https://nest.com/widget/compatibility/>

#### Nest Installation Guide (video)

<https://www.youtube.com/watch?v=dHKD-9uI24I>

#### Nest Installation Guide (written)

<https://owncloud.hellotech.com/index.php/s/WECG3nnUfSRk3YJ/download>

### Honeywell Documentation

#### Honeywell Compatibility Checklist

<https://yourhome.honeywell.com/en/general-pages/wi-fi-programmable-thermostat-home-compatibility>

#### Honeywell Lyric Install guide

<https://customer.honeywell.com/resources/techlit/TechLitDocuments/33-00000s/33-00151EF.pdf>

#### Honeywell Wi-Fi Smart Thermostat Manual

<https://customer.honeywell.com/resources/techlit/TechLitDocuments/69-0000s/69-2810.pdf>

#### Honeywell Wi-Fi 7-Day Programmable Thermostat

<https://customer.honeywell.com/resources/techlit/TechLitDocuments/69-0000s/69-2720.pdf>

#### Honeywell Wi-Fi 7-Day Touchscreen Programmable Thermostat

<https://customer.honeywell.com/resources/techlit/TechLitDocuments/69-0000s/69-2717.pdf>

## Helpful Links to Commonly Installed Thermostats

### **EcoBee Documentation**

#### **EcoBee Compatibility Chart**

<https://www.ecobee.com/compatibility/>

#### **EcoBee Installation Guide**

<https://www.ecobee.com/installing-your-ecobee4/>

#### **EcoBee Room Sensor Guide**

[https://www.ecobee.com/wp-content/uploads/2015/12/RoomSensor2Pack\\_InstallationGuide\\_E.pdf](https://www.ecobee.com/wp-content/uploads/2015/12/RoomSensor2Pack_InstallationGuide_E.pdf)

### **Additional Brands**

#### **IRIS Thermostat Operation Manual**

[https://www.lowes.com/campaign/iris/pdf/LOWE%20241\\_SmartThermostat\\_IM\\_Oper.pdf](https://www.lowes.com/campaign/iris/pdf/LOWE%20241_SmartThermostat_IM_Oper.pdf)

#### **GoControl Thermostat Operation and Installation Manual**

<http://www.gocontrol.com/manuals/GC-TBZ48-Install.pdf>

#### **Emerson Sensi Thermostat Installation Manual (white model)**

[http://www.emersonclimate.com/Documents/White-Rodgers/instruction\\_sheets/37-7498\\_for\\_website.pdf](http://www.emersonclimate.com/Documents/White-Rodgers/instruction_sheets/37-7498_for_website.pdf)

#### **Sensi Wi-Fi Thermostat INstallation Manual (black model)**

<https://sensicomfort.com/uploads/support/Sensi-Touch-Thermostat-Installation-Guide-2017.pdf>