



HomeWorks QS Homeowner Training Checklist

A homeowner's enjoyment of the system is directly related to their understanding of how the system operates. This checklist is intended to provide reminders while training homeowners on how to use their system. It is imperative that each pertinent item is reviewed.

- Local control fail-safe operation**
Show the homeowner that local controls, such as Maestro, GRAFIK T, GRAFIK Eye QS still function if the HomeWorks QS system is inoperative.
- Air gap / FASS (Front Accessible Service Switch)**
Show the homeowner the operation of the air gap / FASS switch on the Maestro and GRAFIK T controls. Explain when to use it.
- Manual override**
Demonstrate the operation of manual override and how/when to use it.
- Integration Devices**
Demonstrate the operation of the 3rd-party integration equipment.
- Lutron Connect Mobile Applications**
Instruct the end user how to use their Lutron Connect app, including the following key features:
 - Setting up the HomeGlance screen (photo, Favorite zones and scenes)
 - Timeclock and HVAC Schedule Editing
 - Keypad editing
 - Voice Control configuration (Amazon Alexa, Apple HomeKit, etc.)
 - Adding Sonos to a button (if necessary)
 - Using the Connect app with an Apple Watch (if necessary)
 - Setup and explain Arriving/Leaving Home
 - Provide customer with their credentials and review the following: changing password, forgot password, and changing email
- Lutron Connect Help Menu**
Show user how to utilize the help menu of the Lutron Connect mobile app including where to find the dealer contact information, how to submit support files, and where to find How-To Videos.

General system programming overview

Walk the homeowner through all programming that has been done and explain how everything in the system works. Go through each room to demonstrate system operation and to make any requested changes. Make sure the homeowner can successfully operate the system.

Local dimming control functionality

Explain how local dimmers, such as a Maestro, work including a single tap on/off, double tap to full, and raise/lower.

Single Action vs Toggle

Point out single action button and a toggle button, show how they function, and explain the difference.

Review LED Logic

Explain the LED status on various keypads throughout the home.

Master Raise/Lower buttons

Explain how the master raise/lower buttons will raise/lower the lights affected by the last button press on the keypad.

Double Tap/Hold

Explain which buttons have double-tap and/or hold and what they do.

Vacation Mode

Explain how to enable and disable vacation mode.

Security Mode

Explain what happens in security mode and how to enable/disable it.

Cycle Dim

Teach the homeowner how to properly use a button that has cycle-dim capability.

Sequences

Highlight any manual or automatic sequences being used in the system. Explain to the customer what action starts the sequence and what each step of the sequence does.

Conditional Programming

It's very important for the homeowner to understand any conditional programming that has been implemented in their system.

Engraving

Be sure to have a clear understanding of how the customer would like each button labeled prior to submitting engraving reports. You may need to provide the customer with suggestions and best practices in terms of what text/icons to use. Prior to submitting the engraving details to customer service, have the end user review and sign off on every page of the Engraving Report, printed from the HomeWorks QS software.

Remote dealer access to the system

If you configured the site to allow for remote service access, discuss a procedure for system updates, since the system will be inoperative while being updated. If the homeowner will need to perform any tasks to allow remote access, discuss this procedure.

Telnet Credentials

Create a telnet user name and password for each integration device that will connect to the processor. Only one device can be logged in using the same user name and password at a time. This can be completed using the Tools > Configure Integration section of the software. Provide these credentials to the home owner and ask them to be stored in a secure location.

Leave a copy of the latest database at the job site

Databases can be extracted, however, it is a good practice to save a backup copy on a CD or USB stick and leave it near the processor(s). Share the location of the backup copy with the home owner.