Performance™ Series ExP® Card with ComfortPlanner™ Software

Carrier
Turn to the Experts.℠

Performance™
SERIES

Using the ExP Card for Less Time on the Job

Work Smarter, Not Harder

As a Carrier® dealer, you spend a lot of time on the job. So why not take advantage of the products we sell to make your job a little easier… faster… and maybe a little more profitable, too? The Performance™ Series ExP® Card with ComfortPlanner™ software can do just that. Any time you sell a system with the Performance Series Edge® Thermostat, you can take advantage of the ExP Card's digital memory to program your customer's Edge Thermostat in 30-70 seconds. You'll benefit in a number of ways:

- Technician spends less time on the job for potentially higher profit margin.

- Using the ExP Card in front of the customer demonstrates the ease of use and convenience of this product which could lead to an add-on sale

- Differentiate your company as one that stays current with technology and the needs of the customer

Advantages of the ExP Card

Carrier's ExP Card with ComfortPlanner software is an optional memory card available with our Performance Series Edge Thermostats.

- For the consumer, it provides the convenience of programming the thermostat from a personal computer with large, intuitive on-screen navigation as well as "point, click and drag" convenience.

- For the dealer, having a set of ExP Cards pre-programmed with typical settings for an air conditioner or heat pump system can be a time saver and money maker.

Getting Started

Programming system settings on the ExP Card couldn't be easier for anybody with experience using a personal computer running Windows XP or newer operating system. Even with very little experience, it's a fairly simple process. Here's how:

- Gently remove the plastic spacer (marked by an arrow) by simply pulling it away from the ExP Card in the opposite direction of the arrow. Now the "small" end of the ExP Card will fit into a USB port on your computer.

- With the metal contacts facing up, insert the small end of the card into an available USB port on your computer.

- The software should launch automatically or you may be prompted to do so. If not, access the program by navigating to My Computer (typically done through the "start" menu).

- Once the program is launched, it automatically looks for internet connection and software updates, then takes you to the Welcome screen where you can access Configuration, Schedules, Vacation Settings, and Run Settings from the on-screen menu.

- If you want on-screen help, select the Automatically Display Help option.

Configuration

As the installing dealer, you will have access to more than 30 system setup functions from the Configuration screen. These settings include equipment type, lockout temperatures, latch temperatures, deadband setting, cycle times and more.

- Use the drop-down menu boxes for each function to select your settings.

- The first option on the configuration screen is equipment type. Please refer to pages 26 and 27 in your installation instructions for the correct equipment codes.

- Continue to enter all remaining configuration settings – about 33 in all.

- IMPORTANT! Once you have completed your configuration settings, select Save on the upper left corner to save your settings to the ExP® Card. (You can also skip this step now, as long as you remember to save your settings once you have completed all programming steps.)

All of these functions can be set at the thermostat on-site by the technician; however it can be time consuming. By loading these settings on an ExP Card in advance, you can save your technician time and possibly reduce chances for a callback with fast, accurate and consistently correct programming.

Schedules

Most customers will want to set their own, customized comfort schedules based on their lifestyle. However, you can show your commitment to excellent customer service by programming the system for them based on information they provide. At the very least, you should be familiar with how to program a comfort schedule using the ExP Card so you can guide your customer if they need assistance.

Programming you customer's daily comfort schedule is as easy as clicking and dragging with ComfortPlanner™ software on the ExP Card.

- When programming a comfort schedule, you can select Weekdays with one click, Weekends with one click, or you can select the individual days as desired.

- You can change schedule times and temperatures by simply clicking and dragging on the bar chart.

- Or, click on the day part you wish to program and change settings using the up and down arrows next to the numeric temperature and time displays.

Create and Save Multiple Schedules

You can create and save several different weekly schedules using the Schedules submenu on the lower left side of the screen. This can be convenient for families who wish to easily switch between different comfort schedules – for example, one for holidays, one for typical weeks, one for when guests are staying over, etc.

- Select a schedule from the Schedules list, or select "Add" to create and name a new schedule

- Create your schedule

- When you select a new schedule from the list or exit the Schedules screen, you will be prompted to save your settings

- When you Save and exit the ExP Card, you can select which schedule you would like the Edge® Thermostat to run

Vacation Settings

The vacation settings allow homeowners to select temperature, humidity, and fan settings for times when they are away from home. These settings help maintain minimal heating, cooling, humidity and ventilation control and maximum energy savings.

Run Settings

Run Settings allows you to decide Hold Set Points, Humidify and Dehumidify settings, Backlighting preferences, Lock Keypad, Fan Control and Mode settings.

Save Before Exiting!

Once you have completed programming the ExP® Card from your computer, save your information to the ExP Card as follows:

- Click on Save in the upper left section of the screen
- A dialogue box will open with your save options
- Select the comfort schedule you wish to run from the Follow Schedule drop-down menu, or you can select Hold or Vacation

- Click on Save in the upper left section of the screen
- A dialogue box will open with your save options
- Select the comfort schedule you wish to run from the Follow Schedule drop-down menu, or you can select Hold or Vacation
- Select Save
- Your newest settings will be saved to the ExP Card under the file name "STATDATA.UTC" (the software does this automatically – you should not need to select or name a file)
- Now it is safe to exit the program by selecting Exit

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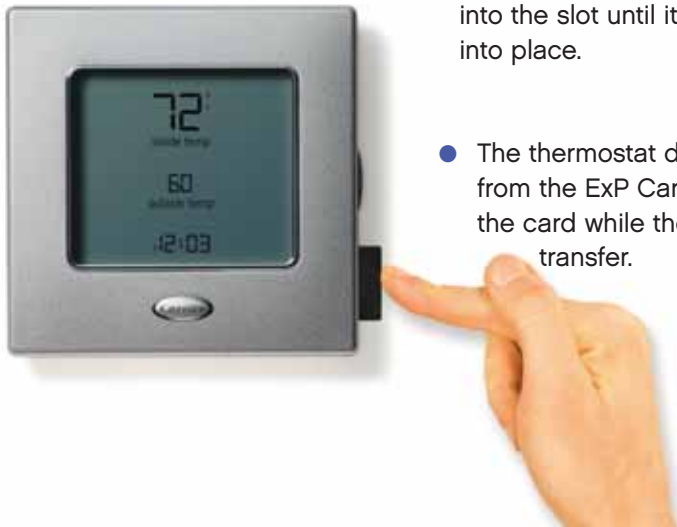
Transferring Data to the Edge® Thermostat

● Remove the ExP® Card from your computer.

● Re-attach the plastic spacer by aligning the grooves in the spacer with the tabs on the ExP Card and gently push the spacer in the direction of the arrow until it snaps into place.

● Insert the ExP Card into the slot on the lower right side of the Edge Thermostat making sure the metal contacts are facing the wall.

● Gently press the ExP Card into the slot until it clicks into place.

● The thermostat display will start blinking as information is loaded from the ExP Card to the thermostat. *IMPORTANT!* Do not remove the card while the display is blinking or the information will NOT transfer.

● The thermostat display will flash rapidly 3-4 times to indicate transfer is complete. It should be ready in 30-70 seconds.

● To remove the ExP Card, gently push it in until you hear it click, then release. The card is spring-loaded.

You are ready to start saving time on every system you install a system with the Edge Thermostat.

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