Control4® Smart Home
Automations Guide

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AT **CTRL4.CO/USERGUIDE**

Contents

Note: The information in this guide applies to the latest Control4 system capabilities. Features can vary between customized installations and Control4 software releases, so contact your Control4 Dealer with any questions about available features.

Important: For creating your own automations, your Control4 system must be on Control4 OS v2.10 or later.

About automations
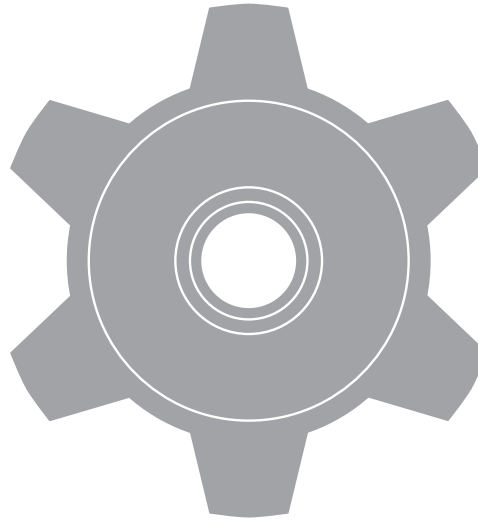
Take control

With a Control4 system, you can create your own set of "digital instructions" for the system to follow, triggered by a myriad of possible events. There's no need to contact your Control4 Dealer to create these basic automations— Just log in to your *customer.control4.com* account, and you can access settings for your entire system.

Adapt

You (or your Control4 Dealer) may have set up a long list of automations when your system was first installed. But your lifestyle changes over time, and your home automation needs to change along with it. These When >> Then automations are just what you need to bring the system up to date with your latest needs.

Learn

The first part of this guide covers the basics of getting set up to use automations. The second part covers the events ("Whens") you can select from. The third part covers the actions ("Thens") that can result. Finally, editing completed automations is explained.

Control4

Planning automations

When >> Then

you do this...   this happens

Planning ahead

In the world of Control4 custom automations, also known as "When >> Then," every action can result in a host of reactions. You can decide which event ("When") results in which action ("Then").
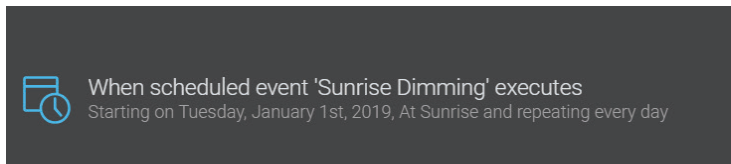
Before creating your own automations, it helps to plan ahead. A good place to start is to ask yourself these two questions:

1 What event should happen that starts the automation? (the "When")

2 What is the end result you want with the automation? (the "Then")

Another approach is to write down every "I wish..." thought you encounter regarding your smart home, over the course of several days. With this comprehensive "wish list," you can more deliberately plan how each automation should be launched and which results can be combined.
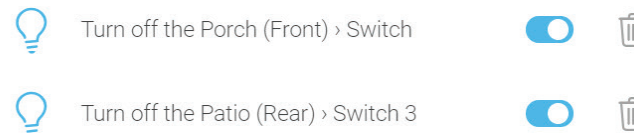
This is what a "When >> Then" automation looks like. The action is on the left, the result on the right.
You'll first select the "When" (sunrise, in this example), then you can specify "Thens" (turning off the outside lights).

When scheduled event 'Sunrise Dimming' executes
Starting on Tuesday, January 1st, 2019, At Sunrise and repeating every day

Tips for planning your automations

- Don't worry about making mistakes—it's as easy to change (or delete) an automation as it is to create one. And your Control4 Dealer can also help answer your questions or create automations for you.

- Test the automation as you add "Thens" to make sure it acts the way you expect it to.

- If you want multiple keypads to launch the same automations, it's much easier to remember button assignments if the automations are assigned consistently to each keypad.

- You will be able to see dealer-created automations in your list, but they will be disabled for editing unless the dealer unlocks them. To change or delete those automations, contact your Control4 Dealer.

- Requesting automation changes to buttons with engraved names may necessitate changing the engraving text (for the label to match the new action). Keep in mind that replacing buttons that have text labels will involve additional cost. Ask your Control4 Dealer for details.

- It's good practice to create an automation that can reverse or "clear" every schedule event automation you create. For example, if you create a "Sunset" automation that turns on most lights at sunset, it's a good idea to create another schedule automation (such as "Night") that turns off most lights at bedtime.

Turn off the Porch (Front) › Switch

Turn off the Patio (Rear) › Switch 3

Control4

Getting started

To create your own home automation, you'll first need to log in to your online Control4 account.

Important: You must have a current 4Sight subscription to create your own automations, and your system must be on Control4 OS v2.10 or newer. If you need to upgrade to OS v2.10, contact your Control4 Dealer.

To subscribe or check on your subscription status, log in to *customer.control4.com*, then click **4Sight** in the **Resources** tile. You can also ask your Control4 Dealer to help you sign up or renew.
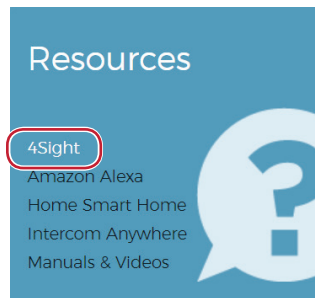

To make sure your Control4 system is upgraded to v2.10 or newer:

- On a Control4 touch screen, tap **Settings**, then tap **System Info** and look at the number under "Control4 software."
- On a Control4 mobile device app, tap **Settings**, **Systems**, then tap Control4 system name and look at the number listed under "Director Version."
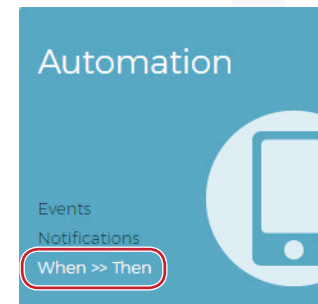
To log in and watch an introductory video:

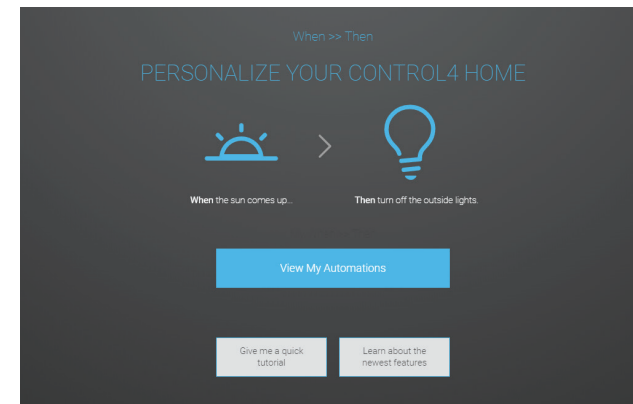1 Log in to your account at *customer.control4.com*.
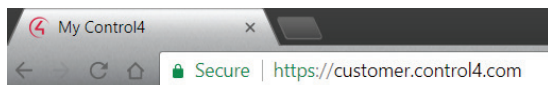
Tip: If you don't have your login information, contact your Control4 Dealer. Or, you can go to the login page, enter your email address, then click **Forgot Password**. An email will be sent to you with password reset instructions.

2 In the *Automation* tile, click **When >> Then**.

The *When >> Then* home screen opens.

3 For an quick introduction, click **Give me a quick tutorial**. Scroll through the information, or click **Watch the Video**. When you're ready to try it on your own, click **Go to When >> Then**.

-OR-

If you want to get started right away, click **View My Automations**.

Tip: If you're already familiar with When >> Then and just want to see a list of the newest features that have been added, click **Learn about the newest features**.

Control4

Selecting a "When" event

A "When" is an action or condition that triggers a different action (a "Then"). Control4 automations are made up of a "When" paired with one or more "Thens." Your system has several "Whens" to select from:

Scheduled actions

Scheduled actions are tied to schedules that you've created. A schedule is more than just date and time—it can also include date ranges, recurring dates, start dates and times, and even sunrise/sunset times. You must create a schedule before you're able to add actions to it. You can also edit schedules after the automation has been created.

Buttons

Buttons can be used to start any automation. The buttons can be on a Control4 keypad, switch, dimmer, remote control, or door station, and most button presses can be configured as single, double, and triple-taps.

Lights

Lights can start automations by reaching an on, off, or specific dimming level, whether they reach that state via remote control or manually. You can even make a lighting scene start an automation when it's activated or deactivated.

Security and access

Security and door access can trigger an automation for house-wide monitoring and "welcome home" automations. You can know exactly when your children get home from school or when a package was left inside your door.

Sensors

Sensor-launched automations can add to your home's security by notifying you when motion, vehicles, door or gate openings, or water is detected. Even your Door Station (the Control4 intercom panel) can trigger events when a keypad button is pressed or the camera starts or stops detecting motion.

Room media

Room media, when tied to automations, can make your entertainment options come to life. Want to automatically dim the lights when a movie starts playing? You can do that and so much more.

Delays and timers

For instructions on setting up an action's times, time delays, time ranges, and timers, turn to "Selecting a "Then"" on page 13.

Control4

Creating a schedule event

A schedule event is a "When" that is based on times and dates, or with a recurring natural event such as sunrise and sunset.

> **Tip:** It's good practice to create an automation that can reverse or "clear" every schedule event automation you create. For example, if you create a "Sunset" automation that turns on most lights at sunset, it's a good idea to create another automation (such as "Night Night") that turns off most lights at bedtime.
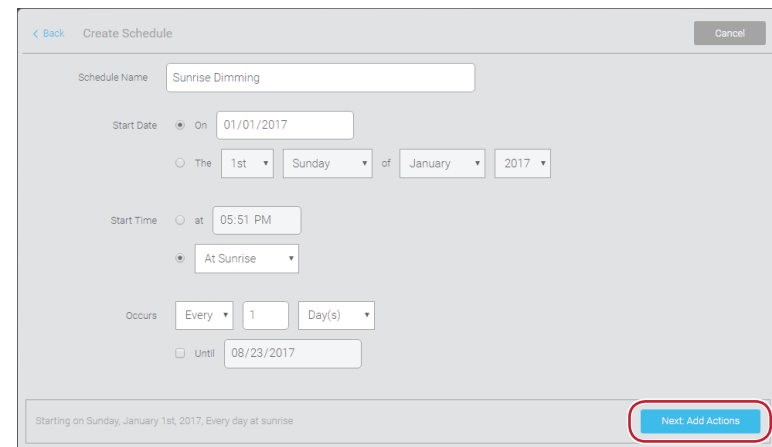
To create a schedule:

1 In the *Automation* home screen, click **Add New Automation**, click **Schedule something to happen...**, then click **Create New Schedule**.
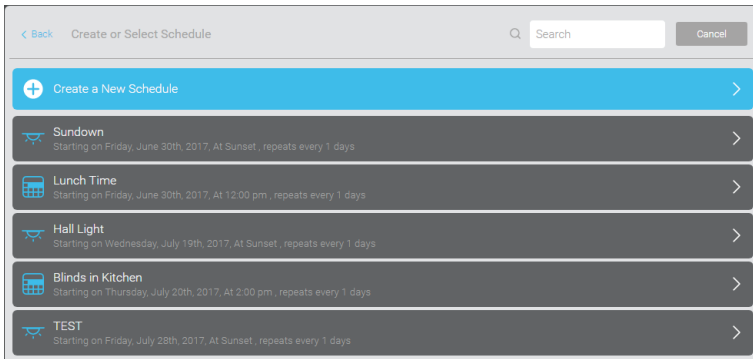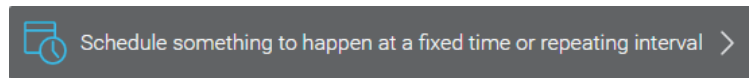
The *Create Schedule* screen opens.
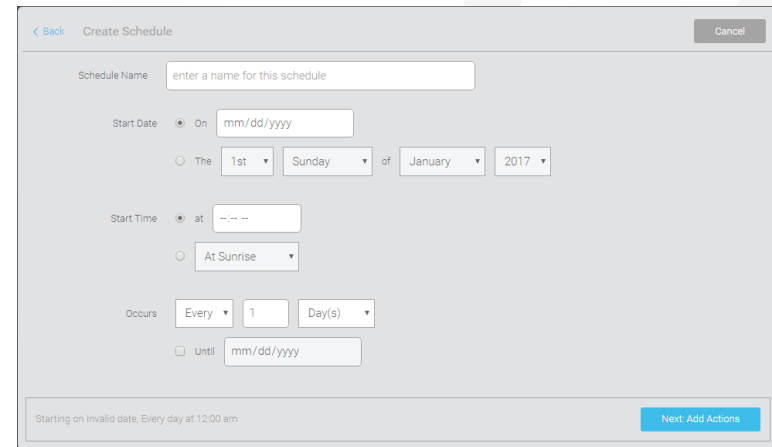
2 Enter a descriptive and unique name for the schedule, set the dates, times, and the recurrence, then click **Next: Add Actions**.

The action assignment screen opens.

3 Go to "Selecting a "Then"" on page 13.

Control4

Creating a voice scene event

A voice scene is a "When" event that, like all other available events, can result in a host of "Then" actions, all depending on how you put together the automation sequence.

Voice scenes bring the Amazon Alexa voice experience into your Control4 system to allow voice control of automation features. For example, a voice scene allows you to play music from a streaming service (such as Spotify) throughout your house.

> **Tip:** It's good practice to create an automation that can reverse or "clear" every "Turn On" voice scene automation you create. For example, if you create a "Turn On Night Night" voice scene automation that turns off all lights at bedtime, it's a good idea to create another automation (such as "Turn On Good Morning") that turns on lights used in the morning (such as bathrooms, dining room, and hallway).
>
> Another example: If you create a "Turn On Party" voice scene that streams a music channel to your kitchen, rec room, and deck, you should also create a "Turn Off Party" voice scene that turns off all music. (The Alexa system will not understand "Turn Off Party" unless you create an automation named "Turn Off Party.")
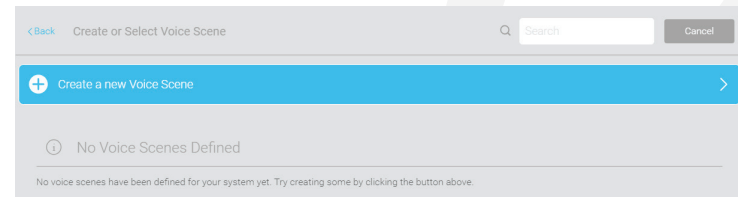
To create a voice scene:

> **Important:** Before creating a voice scene, you need to ask your Control4 Dealer to enable Alexa Home Automation.

1 In the *Automation* home screen, click **Add New Automation**, then under *Voice Scenes* click **Make something happen when you speak**.
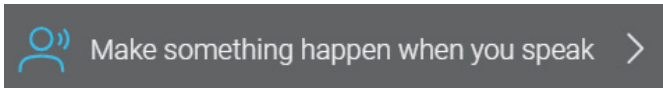
The *Create or Select Voice Scene* screen opens.

The voice scene list will be blank the first time you open it.

2 Click **Create a New Voice Scene**. The *Create Voice Scene* screen opens.

3 Click the drop-down list next to "When I say:" and select how the voice command will begin—**Turn On** or **Turn Off**—then type the voice scene title you want to activate the scene with. In this example, we create a scene called "Night Night."

Important: The "Turn On" and "Turn Off" options refer to only what you want the voice command to start with, *not* to what the scene *does*. The identical "Then" actions are available whether you select "Turn On" or "Turn Off." Which you use to start the voice command is completely up to you and what makes sense to you.

4 Click **Next: Add Actions**, then go to "Selecting a "Then"" on page 13.

Control4

# Creating a keypad or remote button tap event

A keypad or remote button tap event is a "When" that is based on single-, double-, or triple-taps of keypads or presses of remote control custom buttons.
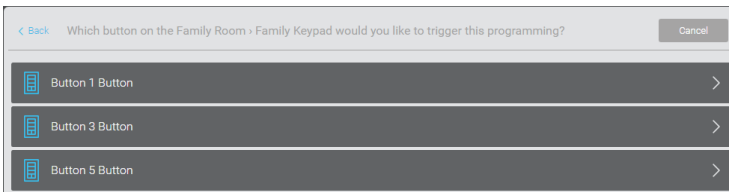
To create a button tap event for keypads or switches:

1 In the *Automation* home screen, click **Add New Automation**, then click **When a keypad button is tapped...**
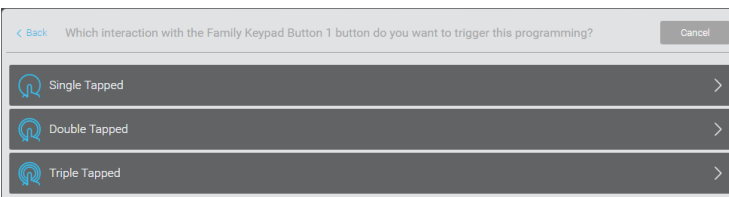

> 🗒 When a keypad button is tapped ›
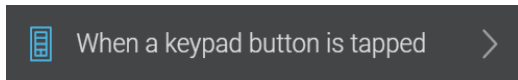
A list of keypads opens.
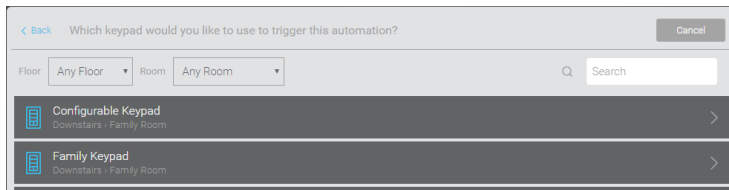
2 Click the keypad you want to use. A list of available buttons opens.
Note: The available buttons will depend on the keypad's button layout.


3 Click the button you want to use. A list of available tap patterns opens.

4 Click the tap pattern to use. The action assignment screen opens.

5 Go to "Selecting a "Then"" on page 13.

To create a button press event for a system remote:

1 In the *Automation* home screen, click **Add New Automation**, then click **When a system remote custom button is pressed in a room...**

> 📡 When a system remote custom button is pressed in a room ›
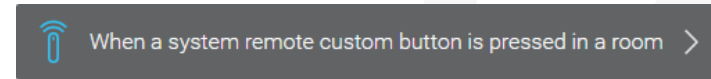
A list of rooms opens. (Remember that a "room" can also be "outside" or "garage.")
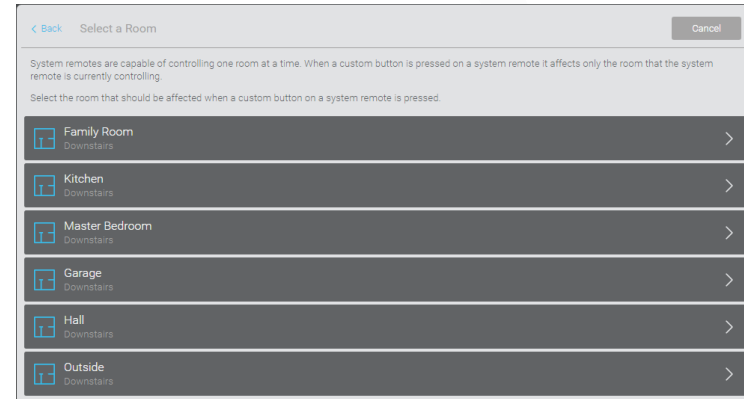
2 Click the room in which to set the button's behavior. A list of the three available buttons opens.
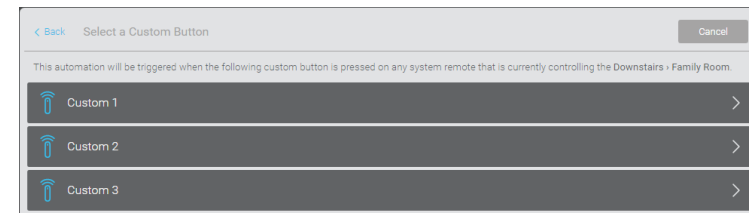
3 Click the button to use for the action. The action assignment screen opens.

4 Go to "Selecting a "Then"" on page 13.

Control4®

Creating a light switch tap event

A light switch tap event is a "When" that is based on single-, double-, or triple-taps of light switch and dimmer buttons.

**To create a light switch tap event for light switches and dimmers:**

1 In the *Automation* home screen, click **Add New Automation**, then click **When a light switch button is tapped**.
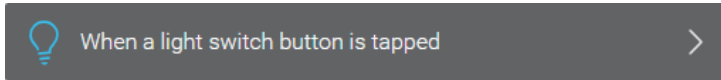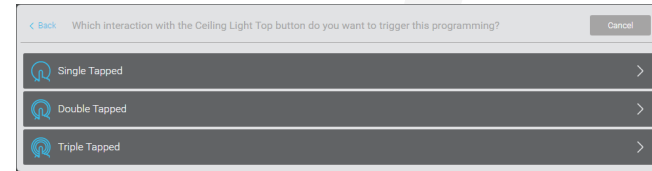

A list of light switches and dimmers opens.
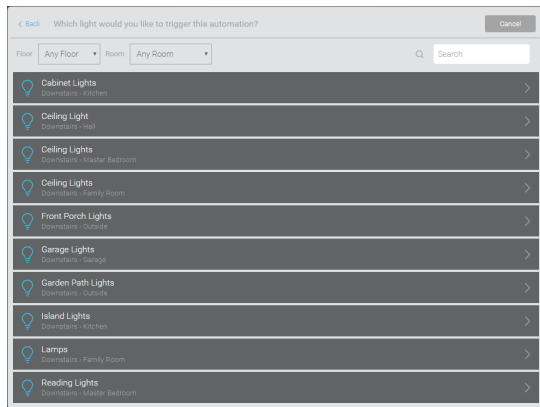
2 Click the light switch or dimmer you want to use. A list of available buttons opens. **Note:** if your switch has more buttons than the single on/off switch, it's considered a "keypad," and you should create a button tap event instead (see previous page).
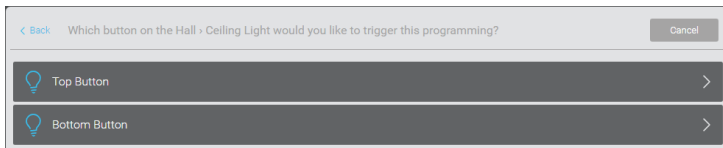
3 Click the button you want to use. A list of available tap patterns opens.

4 Click the tap pattern to use. The action assignment screen opens.

5 Go to "Selecting a "Then"" on page 13.

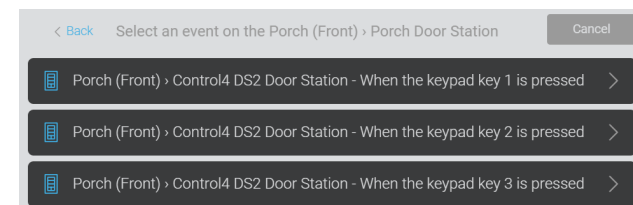## Creating a door station tap event

A door station's buttons can be used for a "When" based on button taps.

To create a door station tap event

1 In the *Automation* home screen, click **Add New Automation**, click **When a door station button is pressed**, then click the door station you want to use.
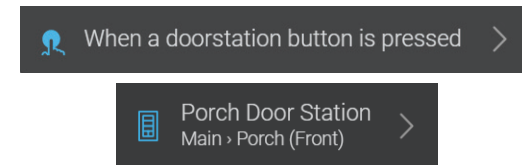

A list door station buttons opens.

2 Click the door station button you want to use. The action assignment screen opens.

3 Go to "Selecting a "Then"" on page 13.

Control4

Creating a lights event

This event detects lighting status, regardless of how the light got to that level—either through keypad control, manual load control, or an automation. For example, you can automatically play music in a room when the light is turned on or lock the front door whenever the porch light is turned off.

To create a lights on/off event:

1 In the *Automation* home screen, click **Add New Automation**, then click **When a Light is turned on or off**.
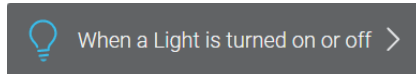
A list of lights opens.
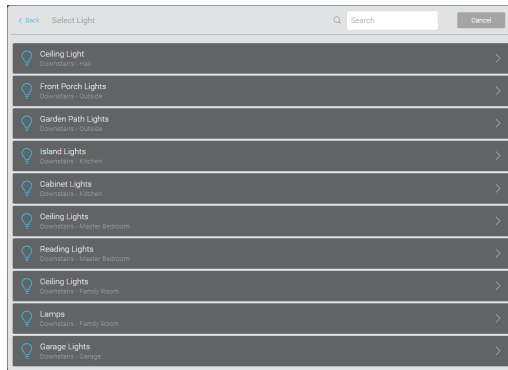
2 Click the light you want to use. A list of available lighting states opens (on or off only).

Tip: Any amount of "on" will launch an "on" event. For example, a dimmer that's barely on will launch a "lights-on" event as surely as it would at full brightness.

3 Click the lighting state to use. The action assignment screen opens.

4 Go to "Selecting a "Then"" on page 13.

Creating a lighting scene event

This event detects when a lighting scene is activated or deactivated. For example, if you use a touch screen to activate the "Good Night" scene, a lighting scene event can use that event to launch actions.

To create a lighting scene event:

1 In the *Automation* home screen, click **Add New Automation**, then click **When a lighting scene is activated or deactivated**.
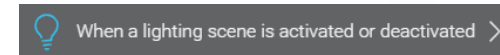
A list of lighting scenes opens.
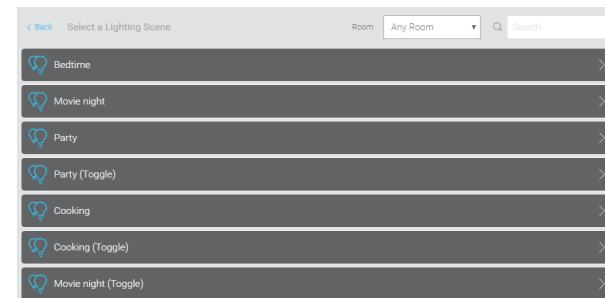
2 Click the lighting scene you want to use as a "When" event. A list of available lighting scene states opens (active or inactive only).


3 Select the scene state ("active" or "inactive") you want the automation to watch for.

4 Go to "Selecting a "Then"" on page 13.

Control4

Creating a security and access event

Whether you want to monitor the comings and goings of your kids, the arrivals of guests or deliveries, or gate access, automation events can help you keep tabs on it all.

To create a security and access event:

1 In the *Automation* home screen, click **Add New Automation**, then click an event such as **When a garage door opens or closes** or **When a door station camera starts or stops detecting motion.** (Available events depend on which hardware is installed.)
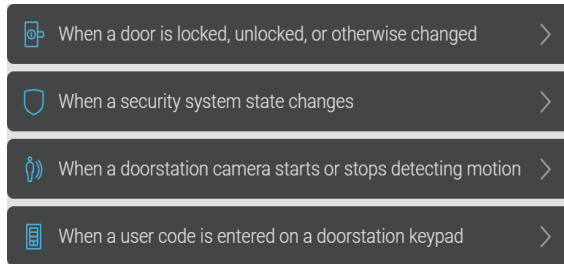
2 A list of blinds, garage doors, or gates opens, including the available open/close states.
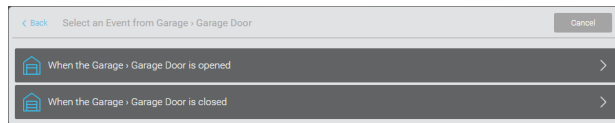
3 Click the open/close state to use. The action assignment screen opens.

4 Go to "Selecting a "Then"" on page 13.

Creating a sensor event

Smart sensors throughout your home and yard can tell you when a vehicle is on the driveway, when motion is detected, when a water leak or excessive heat or humidity is detected, and much more.

To create a sensor event:

1 In the *Automation* home screen, click **Add New Automation**, then click an event such as **When a water sensor indicates the presence of water** or **When a motion sensor detects motion or lack thereof.** (Available events depend on which hardware is installed.)
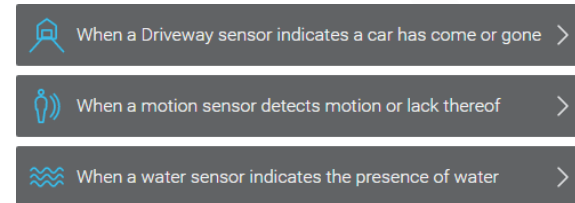
2 A list of sensors—including driveway, gate, heat, humidity, motion, water, and any other available sensors—opens, along with the available sensor states.
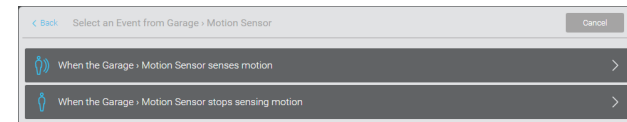
3 Click the sensor state you want to use. The action assignment screen opens.

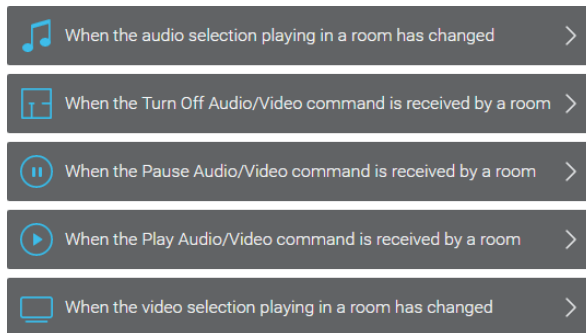4 Go to "Selecting a "Then"" on page 13.

Control4

Creating a room media event

You can use the condition of media playback in any room to start an automation. Whenever a movie is started or stopped, whenever a streaming music station is changed, and whenever a video or audio source has changed, you can change lighting, security, temperature—anything that's connected to your smart home.

> **Tip:** It's good practice to create an automation that can reverse or "clear" every automation you create. For example, if you create a "Party" automation that streams a music channel to your kitchen, rec room, and deck, you should also create a "Party Off" automation that turns off all music.

To create a room media event:

1 In the *Automation* home screen, click **Add New Automation**, then click an event such as **When the Play Audio/Video command is received by a room** or **When the video selection playing in a room has changed**. (Available events depend on which hardware is installed.)

2 A list of the rooms in your house opens.
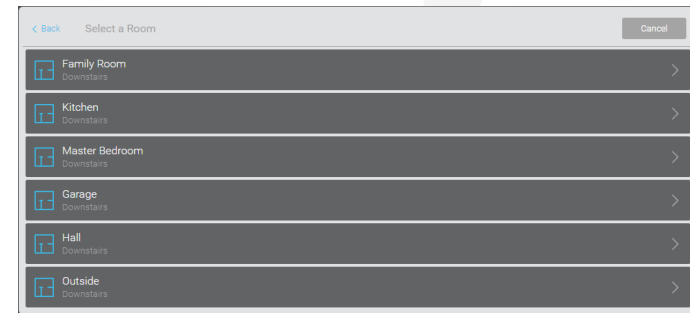
3 Click the room you want to use. The action assignment screen opens.

4 Go to "Selecting a "Then"" on page 13.

Control4

Selecting a "Then" action

A "Then" is an action or actions that result from a "When" event. Although all "Then" actions are displayed, only actions supported by the Control4 software (such as **Send an email**) or installed hardware will work. You can select from several actions, such as:

- Send a push notification or email
- Turn on, off, or change the level of a light
- Activate or deactivate a lighting scene
- Change the color of LEDs on a switch, dimmer, or keypad
- Set, restart, or turn off a timer on a light, fan, or keypad
- Open or close blinds or shades
- Lock a door
- Turn off all audio and video playing in a room
- Play a favorite TV station, radio station, or streaming playlist
- Select a room's video or audio source
- Find a system remote
- Change a thermostat setting
- Wait a period of time before a resulting action (see next page)

Note: If you want to control a device that hasn't been integrated into your Control4 system, ask your Control4 Dealer for help.

To set a "Then" action:

1 After you have set the "When" event, you are brought to the action assignment screen.
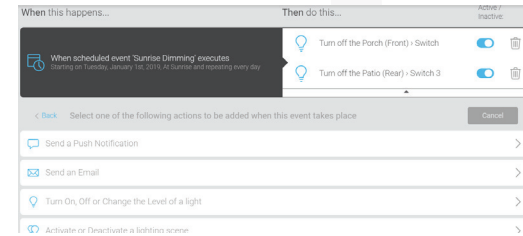
2 The first time you set an action for a particular event, the summary bar (near the top of the screen) should read "No actions currently assigned."

> No actions currently assigned.
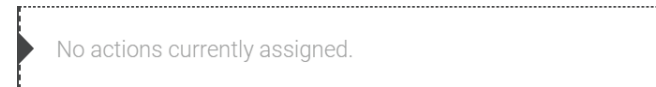
Tip: If the summary bar is grayed out with a lock icon, then the automation has been programmed and locked by your Control4 Dealer, and only they can change it, unless they unlock it.
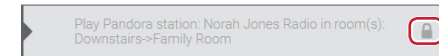
3 Select an action ("Then"). The configuration screen for that action opens.

4 Follow the on-screen prompts to finish adding the action.

Tip: Click **Test** while adding actions to make sure the automation is doing what you expect.

5 To add more actions, click **Add Actions** and select a new action.
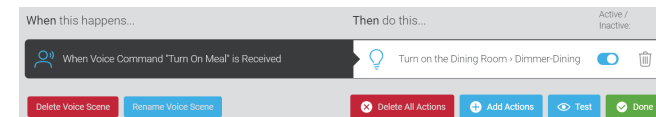
6 When you're done adding actions, click **Done**.

Adding a delay to an action

You can tell the system to wait for a period of time before performing the "Then" action. This is a helpful feature whenever you don't want an action happening immediately, such as turning the lights off in a room while you still need to walk through it.

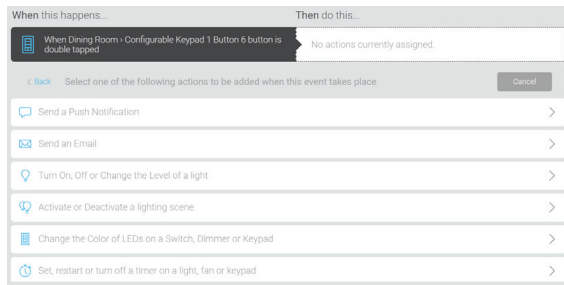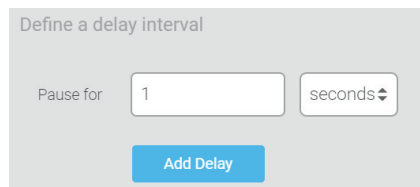**To add a delay to an action in a new automation:**

1 After you have set the "When" event, you are brought to the action assignment screen.
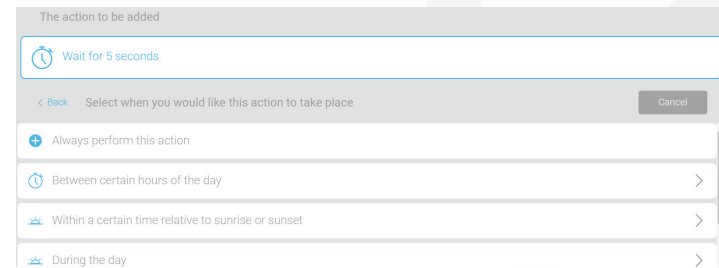

2 Scroll down and select **Wait for a period of time**.

The "Define a delay interval" settings appear.

3 Set the amount of time to delay, then click **Add Delay**. The conditional timing options are listed.

4 Select a time condition (for a simple delay, select), change the condition's settings if prompted.

- For a simple delay, select **Always perform this action**.
- For a time range during which the action is performed, select **Between certain hours of the day**.
- For times relative to the sun's position, which changes throughout the year, select either **Within a certain time relative to sunrise or sunset**, **During the day**, or **During the night**.

5 Click **Add Conditional Action**. In the example below, **Between certain hours of the day** was selected, and the user is now prompted to set the times between which the action(s) will be enabled.
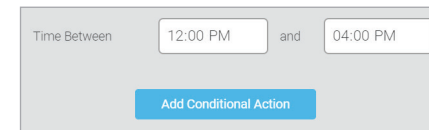
Important: Adding a "Wait" action adds the delay to the bottom of the automation's *Actions* ("*Then do this...*") list, so you need to add delays and other actions in the order you want them carried out.

Control4

Adding a countdown timer to an action

You can set a countdown timer to turn off devices such as lights, fans, or keypads. This feature is useful for conserving energy by keeping lights on for a limited time, making lights being left on less of a worry.

To add a countdown timer to a light or fan:

1 After you have set the "When" event, you are brought to the action assignment screen.
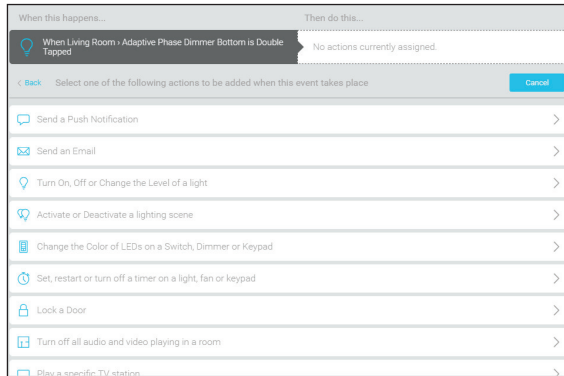

2 Select **Set, restart, or turn off a timer on a light, fan, or keypad**.
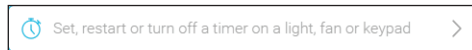
A settings screen opens, asking you to select the device you want the timer to apply to.
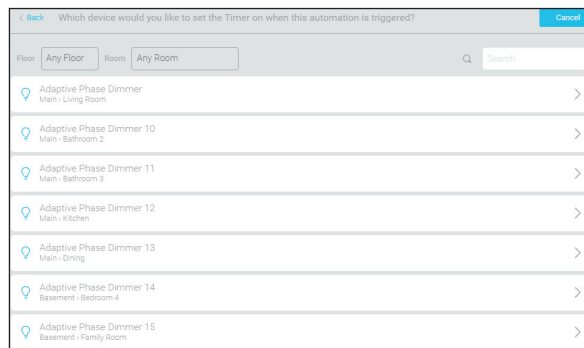
3 Select the device to set a timer on, then select either **Turn off auto-off**, **Restart auto-off**, or **Set auto-off timer**.
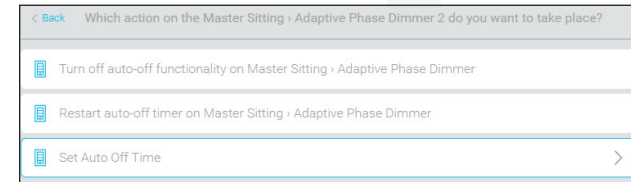
4 If you selected *Set auto-off timer*, set the countdown timer in hours, minutes, and seconds, then click **Set the auto-off time**.

5 Complete setting up the actions as described on the previous pages.

Control4

Editing your automations

After you've created an automation, you can either use the new automation as-is, or add/delete and enable/disable multiple actions. With the addition of enough tasks to an event, pressing one button can, for example, "wake up" your entire house (or put it to sleep).

To edit an existing automation:

1 In the *Automation* home screen, click the automation you want to change. The automation details screen opens.

When this happens...   Then do this...   Active / Inactive:
When Dining Room › Configurable Keypad 1 Button 6 button is double tapped   If time between 02:00 PM and 05:00 PM
                                                          Delete All Actions   Add Actions   Test   Done

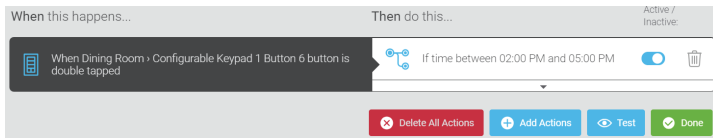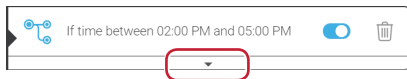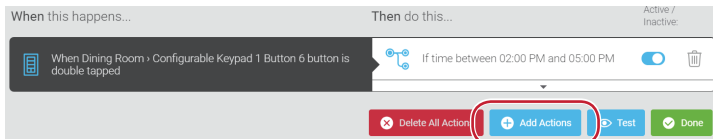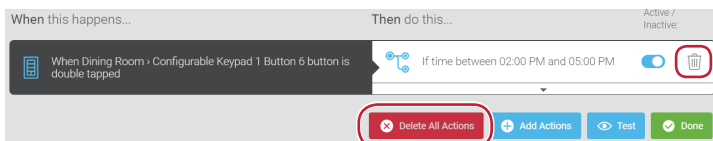**Tip:** Each action is listed in the "Then" column. If the automation has too many actions to display in this view, click the small down arrow at the bottom of the list to expand it.
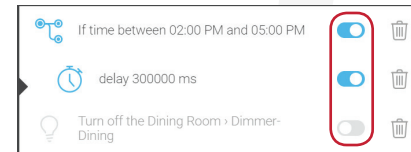
If time between 02:00 PM and 05:00 PM

2 To add an action, click **Add Actions** and select additional "Thens."

When this happens...   Then do this...   Active / Inactive:
When Dining Room › Configurable Keypad 1 Button 6 button is double tapped   If time between 02:00 PM and 05:00 PM
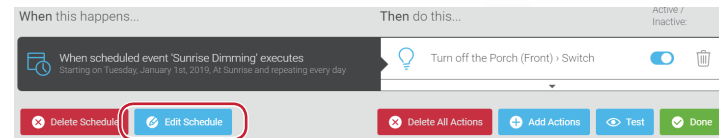   Delete All Actions   Add Actions   Test   Done

3 To delete an action, click the wastebasket icon next to it, or click **Delete All Actions** to delete all of them.
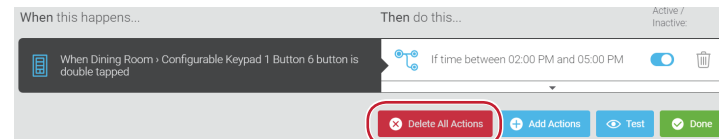
When this happens...   Then do this...   Active / Inactive:
When Dining Room › Configurable Keypad 1 Button 6 button is double tapped   If time between 02:00 PM and 05:00 PM
                                                          Delete All Actions   Add Actions   Test   Done

4 To toggle an action off (or on), click the toggle button next to the action.

If time between 02:00 PM and 05:00 PM
delay 300000 ms
Turn off the Dining Room › Dimmer-Dining

5 To edit a schedule, click the schedule automation you want to change, click **Edit Schedule**, then click **Save** when you're done with changes.

When this happens...   Then do this...   Active / Inactive:
When scheduled event 'Sunrise Dimming' executes
Starting on Tuesday, January 1st, 2019, At Sunrise and repeating every day   Turn off the Porch (Front) › Switch
Delete Schedule   Edit Schedule   Delete All Actions   Add Actions   Test   Done

6 To delete the entire automation, click **Delete All Actions**, then click **Done**.

When this happens...   Then do this...   Active / Inactive:
When Dining Room › Configurable Keypad 1 Button 6 button is double tapped   If time between 02:00 PM and 05:00 PM
                                                          Delete All Actions   Add Actions   Test   Done

Control4

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Contact information

Control4 Corporation
11734 S. Election Road
Salt Lake City, UT 84020 USA
www.control4.com