

somfy®

Serv-e-Go

User Guide

This PDF is interactive and intended to be read on a computer.
Clickable buttons are indicated by grey areas.
Do not hesitate to click them to facilitate and optimize the reading.

Start



Summary

How to register an activated customer box to your Somfy Pro account

4

How to activate Serv-e-go on a registered customer box

7

How to remotely troubleshoot a customer installation

10

How to remotely service a customer installation

15

How to remotely add a new control

20

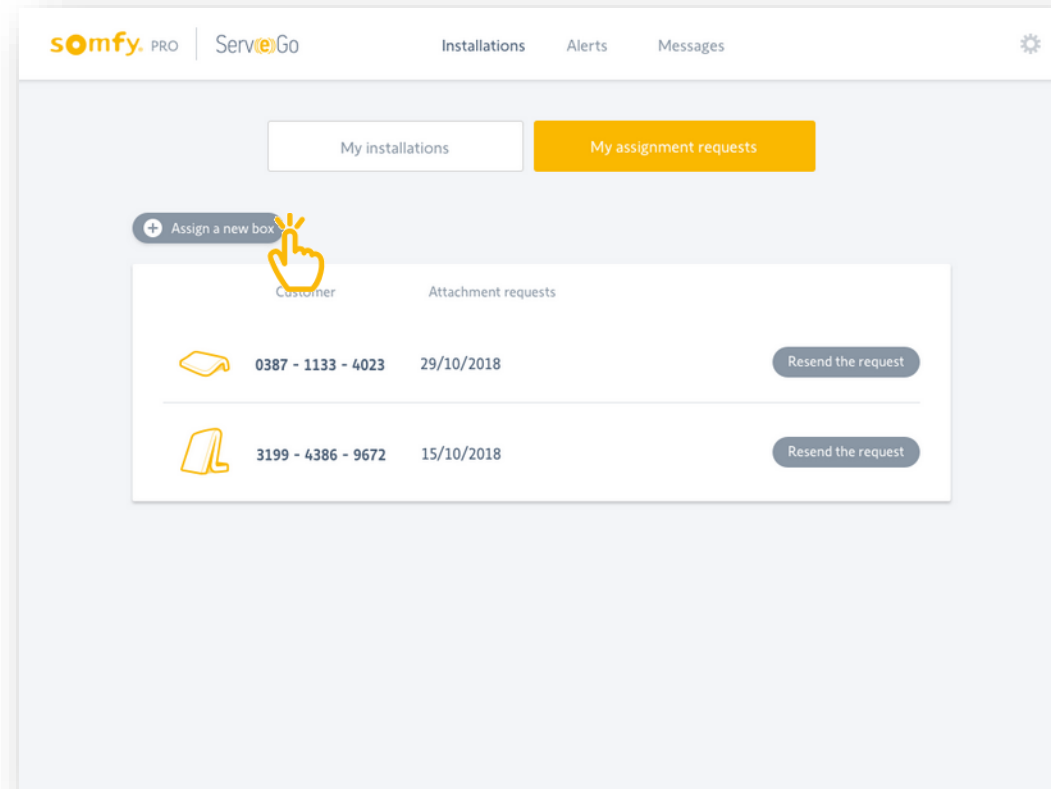
How to access the customer's TaHoma web application

24

How to register an activated customer box to your Somfy Pro account

You would like to register a customer box to your Somfy Pro account, but it has already been activated by the end user ?

1 Access your list of register requests



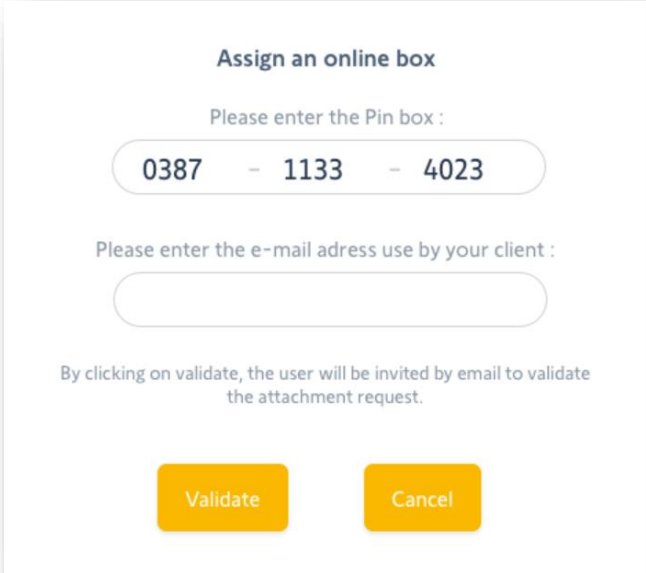
From your list of installations, click on 'Register requests'.

You access here the list of your requests to register activated customer boxes.

Then click on 'Register a new box'.

next →

2 Enter the box PIN-code and user email address



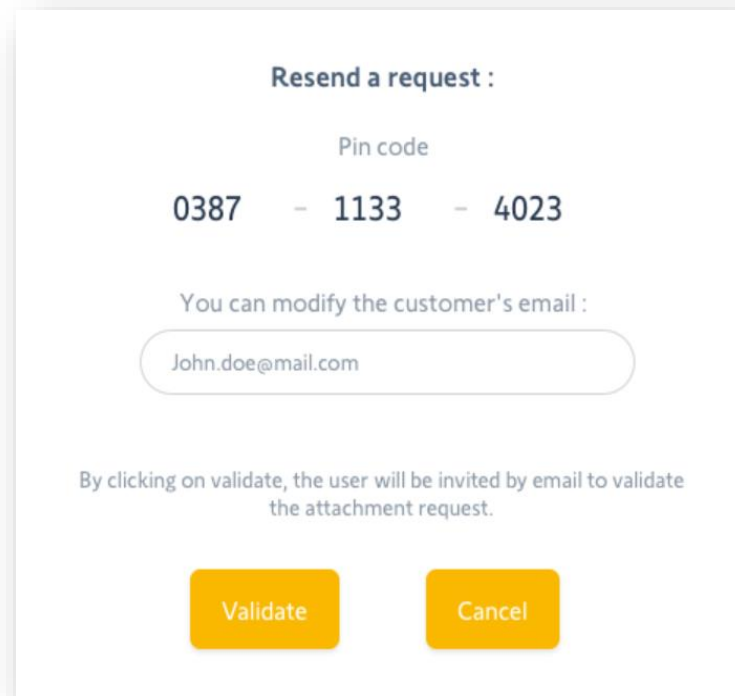
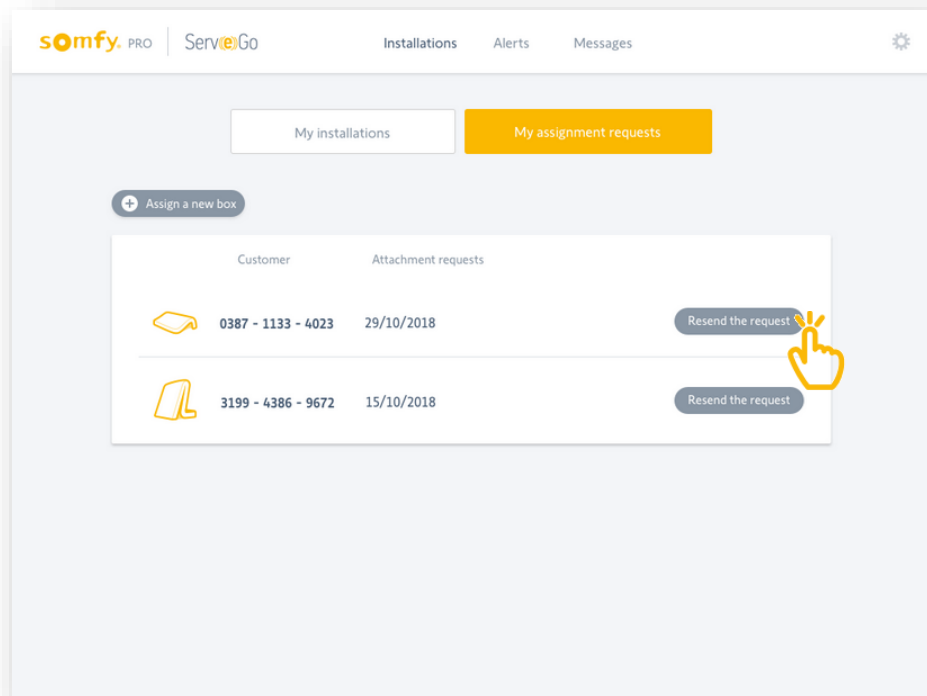
The screenshot shows a white dialog box with a grey border and a drop shadow. At the top, it is titled "Assign an online box". Below the title, there is a label "Please enter the Pin box :". A rounded rectangular input field contains the text "0387 - 1133 - 4023". Below this is another label "Please enter the e-mail adress use by your client :". Underneath is an empty rounded rectangular input field. At the bottom of the dialog, there is a line of text: "By clicking on validate, the user will be invited by email to validate the attachment request." Below this text are two yellow buttons with black text: "Validate" on the left and "Cancel" on the right.

A window will open for you to enter the box PIN-code and the user email address.

An email will then be sent to your customer for validation.

next →

3 Resend an email for customer validation



Your request will remain visible in this list until customer validates.

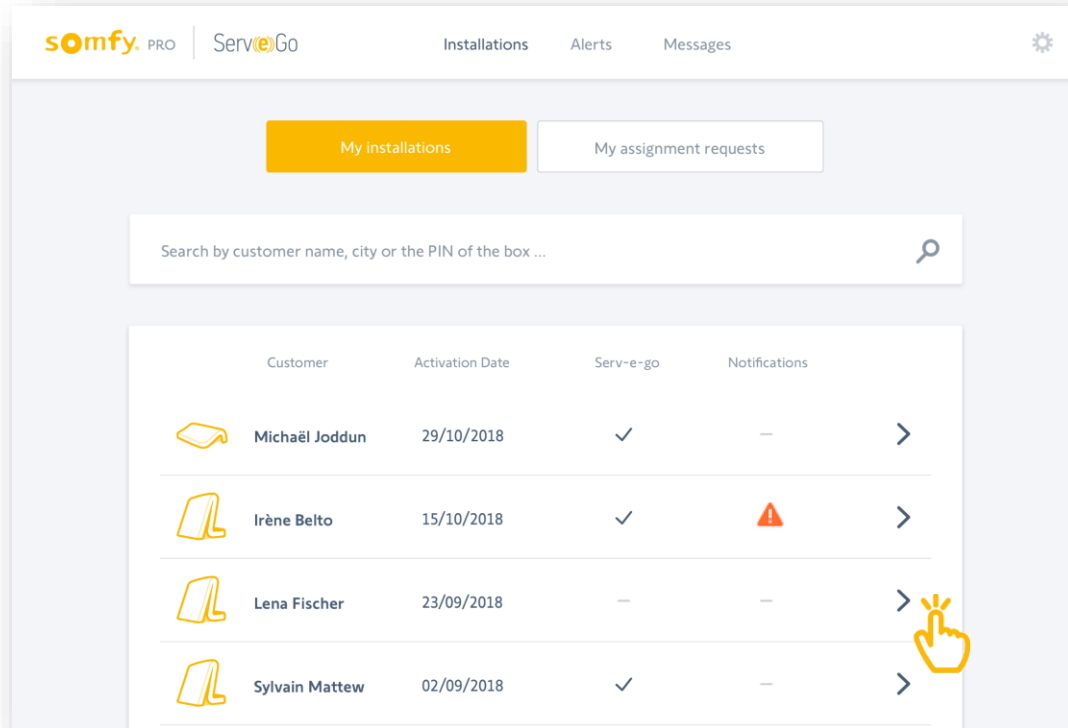
You may at anytime resend an email for validation, by clicking on 'Resend email'
A window will open and you will be able to enter (or modify) the user email address.

summary

How to activate Serv-e-go on a registered customer box

You would like activate the service Serv-e-go on a registered customer box ?

1 Search for the customer installation in your list



Search for the customer installation in your list of registered boxes.

Then click on the customer name to access the installation.

 Remember to activate the service while registering the box on Somfy Pro !

next →

2 Activate Serv-e-go for this user

The screenshot displays the Somfy Pro Serv-e-go interface. At the top, there are navigation tabs for 'Installations', 'Alerts', and 'Messages'. The main content area is divided into two columns. The left column shows customer details for 'Lena Fischer', including her address (Wanke Felix-50-Strabe, 70629 Stuttgart), email (fischer.lena@mail.com), and phone number (+49 74 72 93 00). Below this, a yellow button labeled 'Activate Serv-e-Go for this user' is highlighted with a hand cursor. The right column shows installation details for a 'TaHoma V2' device, including its PIN code (1204-0175-7013), software version (3.10.5), activation date (5/12/2016), and activation status (Activated). A red box highlights the 'Installation', 'Devices', 'Alertes', and 'Interventions' tabs. Below the device details, there is a section for 'GENERAL INFORMATION' showing the device is 'Online' and the last user activity was on Monday, September 3, 2018. Other information includes 'Box Update: Yes', 'Status Agenda: Activated', and 'Status Smart: Disabled'. At the bottom, there is a section for 'AVAILABLE PROTOCOLS' with logos for io Homecontrol, RTS, and RTD.

In the left column, under the customer details, click on 'Activate Serv-e-go for this user'.

An email will be sent to your customer for validation.

i You will not have access to the installation details until your customer validates the service.

next →

3 Access the installation details

The screenshot displays the Somfy Pro Serv-e-Go user interface. At the top, there are navigation tabs for 'Installations', 'Alerts', and 'Messages'. The main content area is divided into several sections:

- User Profile:** Shows the name 'Lena Fischer' and contact information: 'Wanke Felix-50-StraBe 70629 Stuttgart', 'fischer.lena@mail.com', and '+49 74 72 93 00'. It also indicates 'Activation Serv-e-Go 31/01/2018' and a 'Request remote service' button.
- Installation Details:** A tabbed interface with 'Installation' selected. It shows 'TaHoma V2' with details: 'TaHoma Pro', 'PIN Code: 1204-0175-7013', 'Software Version: 3.10.5', 'Activation Date: 5/12/2016', and 'Activation Status: Activated'. An 'Open TaHoma web application' button is present.
- GENERAL INFORMATION:** Shows the device is 'Online', 'Last user activity: Monday, September 3, 2018', 'Box Update: Yes', 'Status Agenda: Activated', and 'Status Smart: Disabled'. An 'Instructions' button is also visible.
- AVAILABLE PROTOCOLS:** Lists supported protocols: 'io' (HomeControl), 'RTS' (Radio Technology System), and 'RTD'.

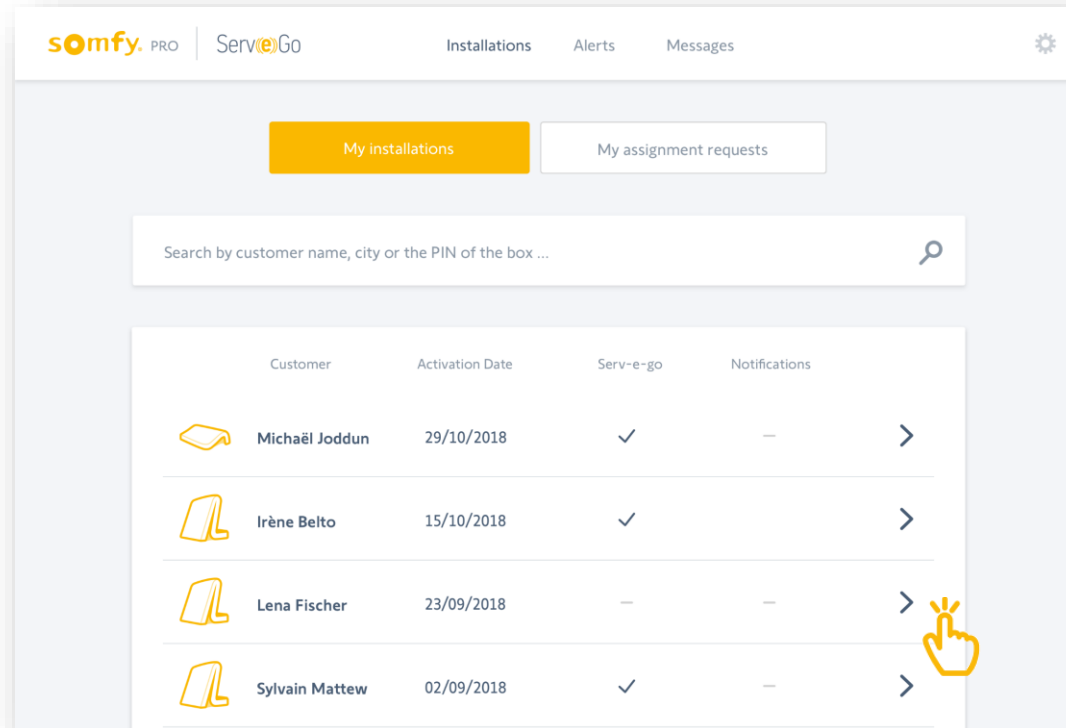
Once service is validated by your customer, you will have access to the installation details.

You will be able to view the products paired, alerts and interventions.

How to remotely troubleshoot a customer installation

You would like to access the installation details to troubleshoot a problem ?

1 Search for the customer installation in your list



Search for the customer installation in your list of registered boxes.

Then click on the customer name to access the installation.

next →

2 Access box details

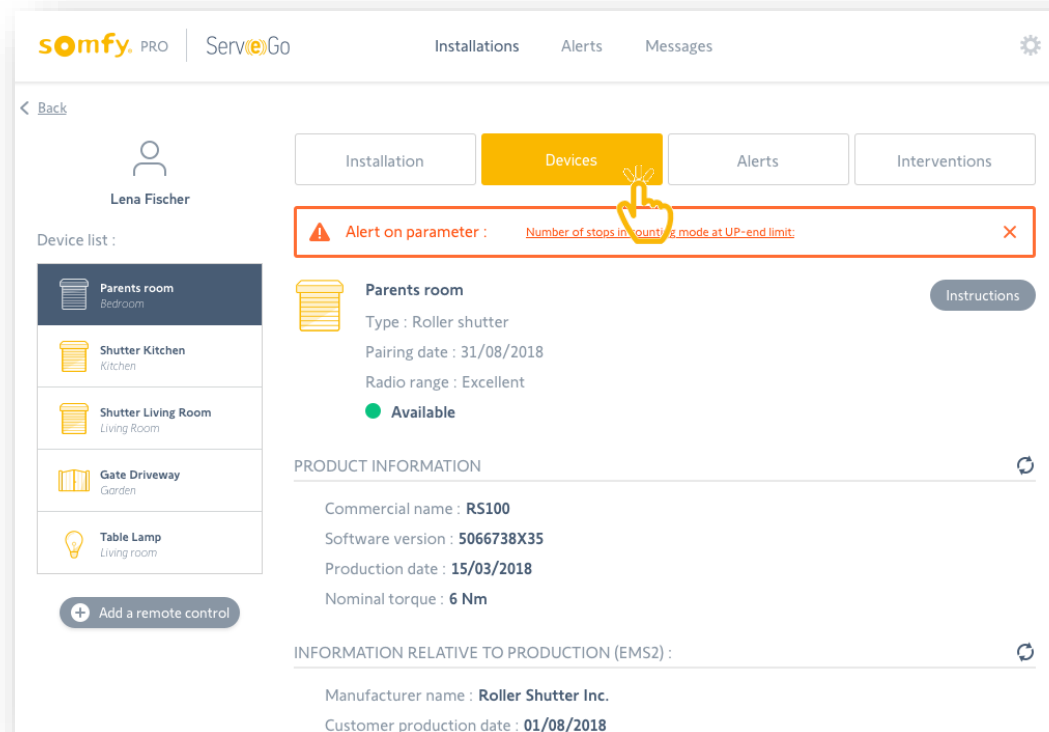
The screenshot displays the 'Installation' tab in the Somfy Pro Serv-e-Go interface. The interface includes a top navigation bar with 'Installations', 'Alerts', and 'Messages'. A user profile for 'Lena Fischer' is shown on the left, with contact information and a 'Request remote service' button. The main content area features a navigation menu with 'Installation' (highlighted), 'Devices', 'Alertes', and 'Interventions'. A hand cursor points to the 'Installation' tab. Below the navigation menu, the device details for 'TaHoma V2' are listed, including the PIN Code (1204-0175-7013), Software Version (3.10.5), Activation Date (5/12/2016), and Activation Status (Activated). A 'GENERAL INFORMATION' section shows the device is 'Online', with 'Last user activity' on Monday, September 3, 2018, and 'Box Update' status of 'Yes'. The 'Status Agenda' is 'Activated' and 'Status Smart' is 'Disabled'. An 'AVAILABLE PROTOCOLS' section shows icons for 'io', 'RTS', and 'RTD'. A 'Remove Serv-e-Go service for this user' button is located at the bottom left.

From this tab 'Installation', you access the box details.

You can view if the box is activated, online or offline, and if the box is up to date.

next →

3 Access list of paired products



From this tab 'Devices', you access the list of Somfy products paired to the box.

By clicking on a product (io only) in this list, you will access the product details.

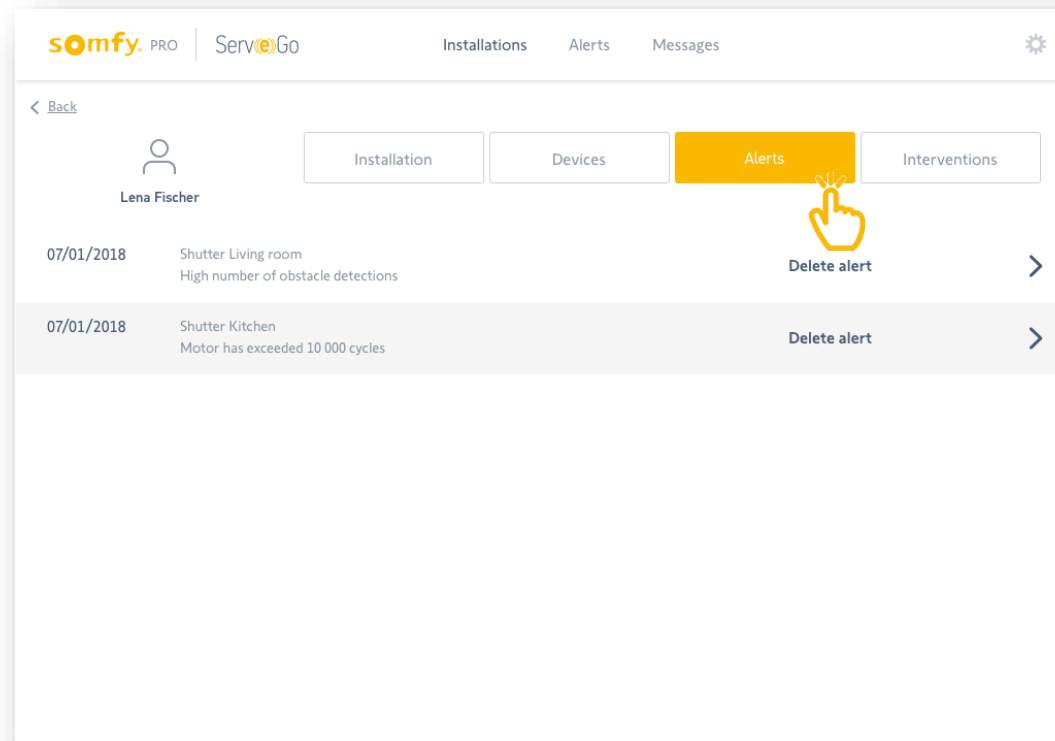
For each product, you can view if the product is online, and the radio level.

i If this tab is locked, you are not authorised to access the installation details.

You must first activate the service Serv-e-go for your customer.

next →

4 Access alerts & error messages



From this tab 'Alerts', you access the list of alerts which occurred on this installation. By clicking on this alert message, you will be redirected to the product raising the alert.

i These alerts can be configured from the Alerts menu, when you click on "Alerts configuration"

next →

5 View remote interventions

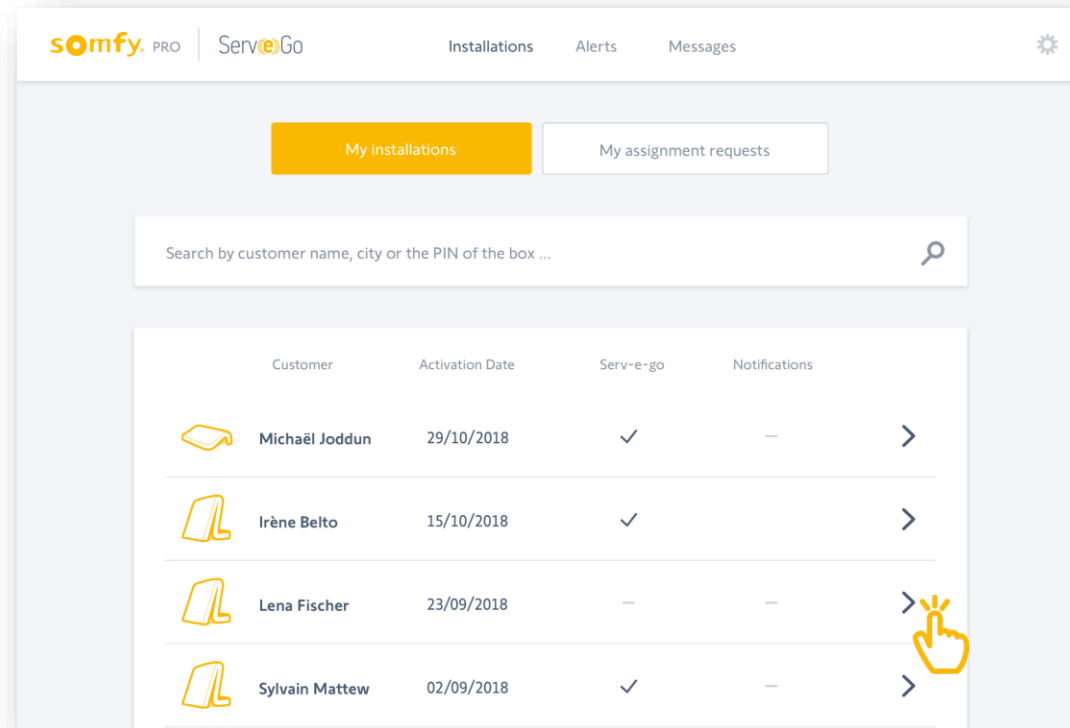
The screenshot shows the Somfy Pro Serv(e)Go interface. At the top, there are navigation tabs: 'Installations', 'Alerts', and 'Messages'. Below these, there are sub-tabs: 'Installation', 'Devices', 'Alerts', and 'Interventions'. The 'Interventions' tab is highlighted in orange and has a hand cursor pointing to it. On the left side, there is a user profile for 'Lena Fischer' with an 'Add a personal note' button. The main content area shows a log of interventions. The first entry is for 'TUESDAY, JUNE 23, 2017' at '9:41 am to 10:01 am'. It lists 'Modifications performed' for 'Shutter Kitchen' in the 'Kitchen' room, showing 'Quiet mode speed (rpm) : 6' and 'Normal mode speed (rpm) : 12'. The second entry is for 'THURSDAY MAY 3, 2016' at '10:28', showing a 'Personal note' that says 'To do the next intervention : Change the scenario « I'm coming » in TaHoma.' There are also icons for editing, email, and PDF export for each entry.

From this tab 'Interventions', you can access the log of all the remote interventions performed with the tool. You also have the possibility to leave notes that will be viewed by yourself only.

How to remotely service a customer installation

You would like to remotely modify certain parameters on your customer's installation ?

- 1 Search for the customer installation in your list



Search for the customer installation in your list of registered boxes.

Then click on the customer name to access the installation.

next →

2 Request a remote service

The screenshot displays the Somfy Pro Serv-e-Go user interface. At the top, the navigation bar includes the Somfy Pro logo, the Serv-e-Go title, and menu items for Installations, Alerts, and Messages. A settings gear icon is located in the top right corner. Below the navigation bar, there is a 'Back' button and a 'Last update' timestamp of 01/01/2019 at 08:23. The main content area is divided into two columns. The left column contains user information for 'Lena Fischer', including her address (Wanke Felix-50-Straße, 70629 Stuttgart), email (fischer.lena@mail.com), phone number (+49 74 72 93 00), and activation date (31/01/2018). A yellow button labeled 'Request remote service' is highlighted with a hand cursor. Below this button is a link to 'Remove Serv-e-Go service for this user'. The right column features a navigation menu with 'Installation' (highlighted in orange), 'Devices', 'Alertes', and 'Interventions'. Below the menu, the device details for 'TaHoma V2' are shown, including its PIN code (1204-0175-7013), software version (3.10.5), activation date (5/12/2016), and activation status (Activated). A button to 'Open TaHoma web application' is also present. The 'GENERAL INFORMATION' section shows the device is 'Online' and provides details on last user activity (Monday, September 3, 2018), box update status (Yes), status agenda (Activated), and status smart (Disabled). An 'Instructions' button is located to the right of the 'Online' status. The 'AVAILABLE PROTOCOLS' section at the bottom lists 'io homecontrol', 'RTS', and 'RTD' with their respective logos.

In the left column, click on 'Request remote service'.
An email will be sent to your customer for validation.

next →

3 Duration of intervention on your customer's installation

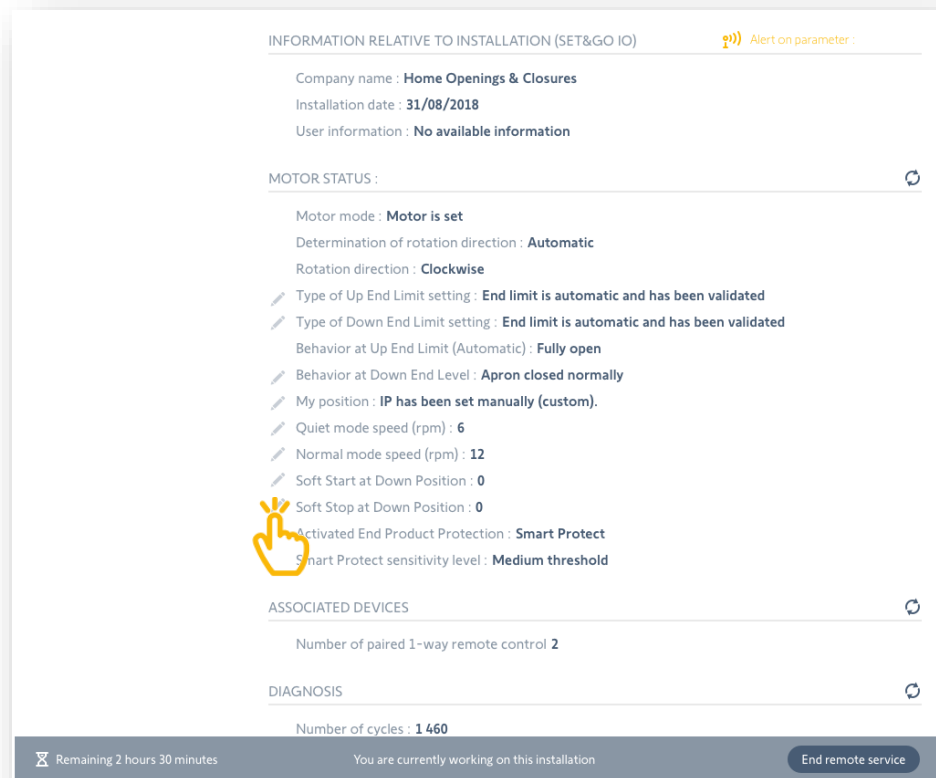
The screenshot displays the Somfy Pro Serv-e-Go interface. At the top, there are navigation tabs for 'Installations', 'Alerts', and 'Messages'. The main content area shows a profile for 'Lena Fischer' with contact information: 'Wanke Felix-50-Strabe 70629 Stuttgart', 'fischer.lena@gmail.com', and '+49 74 72 93 00'. The installation details for 'TaHoma V2' are listed, including 'TaHoma Pro', 'PIN Code: 1204-0175-7013', 'Software Version: 3.10.5', 'Activation Date: 5/12/2016', and 'Activation Status: Activated'. A status indicator shows 'Online' with a green dot. Below this, the 'GENERAL INFORMATION' section includes 'Dernière activité utilisateur : Monday, September 3, 2018', 'Box Update : Yes', 'Status Agenda : Activated', and 'Status Smart : Disabled'. The 'AVAILABLE PROTOCOLS' section shows icons for 'io', 'RTS', and 'RTD'. At the bottom, a banner indicates 'Remaining 2 hours 30 minutes', 'You are currently working on this installation', and an 'End remote service' button.

Once the request has been validated by your customer, you can then work on the installation for a period of 8 hours.

A banner will appear to indicate the remaining time.

next →

4 Remotely modify parameters



INFORMATION RELATIVE TO INSTALLATION (SET&GO IO) Alert on parameter :

Company name : **Home Openings & Closures**
Installation date : **31/08/2018**
User information : **No available information**

MOTOR STATUS :

Motor mode : **Motor is set**
Determination of rotation direction : **Automatic**
Rotation direction : **Clockwise**
Type of Up End Limit setting : **End limit is automatic and has been validated**
Type of Down End Limit setting : **End limit is automatic and has been validated**
Behavior at Up End Limit (Automatic) : **Fully open**
Behavior at Down End Level : **Apron closed normally**
My position : **IP has been set manually (custom).**
Quiet mode speed (rpm) : **6**
Normal mode speed (rpm) : **12**
Soft Start at Down Position : **0**
Soft Stop at Down Position : **0**
Activated End Product Protection : **Smart Protect**
Smart Protect sensitivity level : **Medium threshold**

ASSOCIATED DEVICES

Number of paired 1-way remote control **2**

DIAGNOSIS

Number of cycles : **1 460**

Remaining 2 hours 30 minutes You are currently working on this installation [End remote service](#)

In intervention, you can modify certain parameters (only on Somfy brand io products), or act by performing certain actions (add a remote control, restart the box, access the TaHoma application, etc.).

i The editable parameters are indicated by a pencil, you just have to click on this pencil to edit the parameter.



next →

5 End remote intervention

End remote service ?

If you validate this comment, a new email will be sent to customer.

Interventions performed :

 Shutter Kitchen Kitchen	Quiet mode speed (rpm) : 6 Normal mode speed (rpm) : 12
 Shutter Kitchen Kitchen	Quiet mode speed (rpm) : 6 Normal mode speed (rpm) : 12

Include a comment (optional) :

End service **Cancel**

Once your actions have been carried out, click on 'End remote intervention' in the lower banner.

A window will appear in which you will be able to view the summary of your actions, and where you can leave a comment for your customer.

An email will be sent to your customer, informing them that your intervention is finished, and detailing the actions carried out on the installation.

summary

How to remotely add a new control

You would like to add a new control to your customer's installation, without reporting on site ?

1 Request remote intervention

The screenshot shows the Somfy Pro ServiceGo interface. At the top, there's a navigation bar with 'Installations', 'Alerts', and 'Messages'. Below that, a 'Back' button and 'Last update : 01/01/2019 at 08:23' are visible. The main content area is divided into two columns. The left column shows the customer's profile for 'Lena Fischer', including address, email, phone number, and activation date. A 'Request remote service' button is highlighted with a hand cursor. The right column shows the installation details for 'TaHoma V2', including PIN Code, Software Version, Activation Date, and Activation Status. Below this, there's a 'GENERAL INFORMATION' section with 'Online' status and 'Last user activity : Monday, September 3, 2018'. At the bottom, there's an 'AVAILABLE PROTOCOLS' section with icons for 'io homecontrol', 'RTS', and 'RTD'.

Search for the customer installation in your list of registered boxes.

Then click on the customer name to access the installation.

Adding a remote control is only possible if you have remote access to service the installation.

Make sure that your customer has validated the intervention request.

next →

2 Remotely add a new control

The screenshot shows the Somfy Pro Serv-e-Go interface. At the top, there are navigation links for 'Installations', 'Alerts', and 'Messages'. Below this, the user profile 'Lena Fischer' is shown. The main content area is divided into tabs: 'Installation', 'Devices' (highlighted in orange), 'Alerts', and 'Interventions'. Under the 'Devices' tab, a list of devices is shown on the left, with 'Gate Driveway' selected. The details for 'Gate Driveway' are displayed on the right, including its type, pairing date, radio range, and status (Available). Below the device details, there are sections for 'PRODUCT INFORMATION', 'INFORMATION RELATIVE TO INSTALLATION (SET&GO IO)', and 'MOTOR STATUS'. A yellow hand icon points to the 'Add a remote control' button at the bottom of the device list.

From the tab 'Devices', you access the list of paired products to the customer box.

On this page, click on 'Add a remote control'.


-  If this tab is locked, you are not authorised to access the installation details. You must first activate the service Serv-e-go for your customer.

next →

3 Select if the remote control is with you or your customer

You want to add a remote control to an existing device ?

This function is available for io equipment with only 1 way remote controls



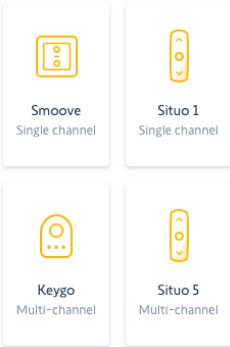
Serv-e-Go allows you to do this operation:

- if the remote control is in your possession
- or if the remote control is already at your customer's premises

I have the remote control

The remote control is at my client home

Select the remote control mode you wish to add



To add the remote control, you will need a compatible USB barcode reader

Technical specifications :

- 2D barcode reader / QR code
- USB or Bluetooth connection
- Configuration in Azerty

i If you want to pair a remote control that you have in your possession, you must have a compatible USB barcode reader to scan the QR code. Make sure beforehand of the technical characteristics of this barcode reader so that it is compatible:

- 2D / QR Code barcode reader
- USB or Bluetooth connection
- Barcode reader configuration in the same language as PC

A window opens in which you will then be guided to carry out the pairing of this remote control.

- Either the remote control to add is already at your customer,
- Either the remote control is in your possession and it will then have to be given to the customer later.

You will be able to add the remote control to one or more devices.



next →

4 End remote intervention

End remote service ?

If you validate this comment, a new email will be sent to customer.

Interventions performed :

 Shutter Kitchen Kitchen	Quiet mode speed (rpm) : 6 Normal mode speed (rpm) : 12
 Shutter Kitchen Kitchen	Quiet mode speed (rpm) : 6 Normal mode speed (rpm) : 12

Include a comment (optional) :

End service **Cancel**

Once your actions have been carried out, click on "End service" in the lower banner.

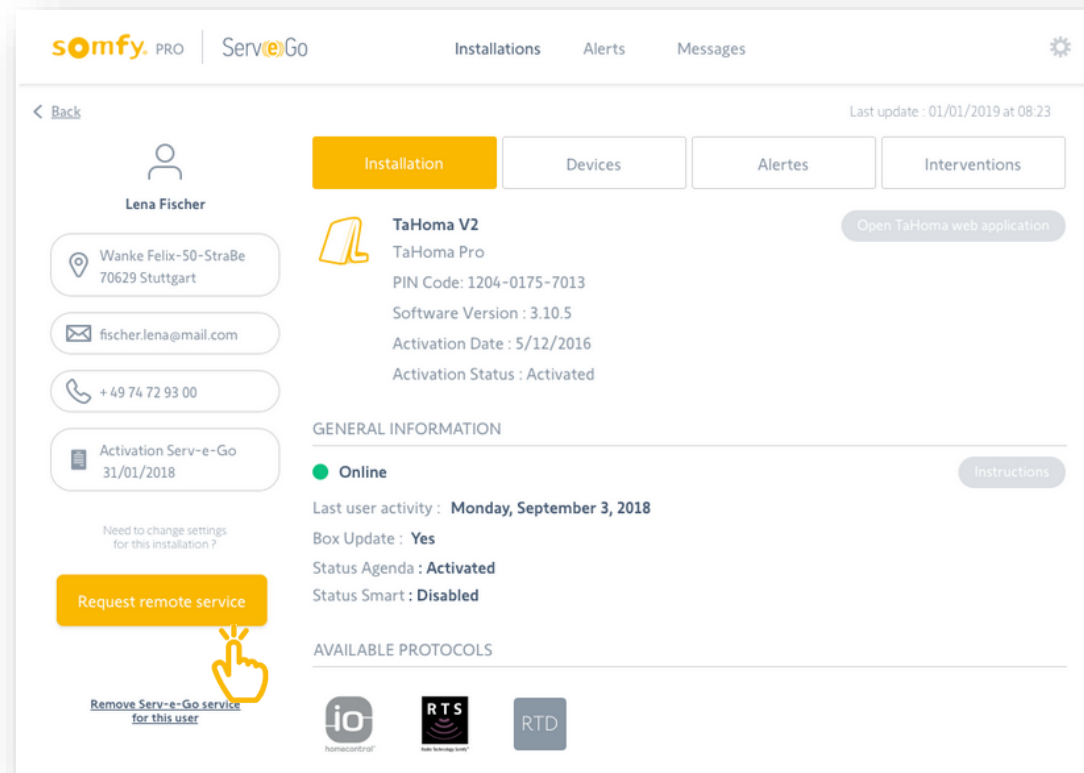
A window will appear in which you will see the summary of your actions, and where you can leave a comment for your customer.

An email will be sent to your customer, informing them that your intervention is finished, and detailing the actions carried out on the installation.

How to access the customer's TaHoma web application

You would like to access your customer's TaHoma web application, without requesting login & password ?

1 Request remote intervention

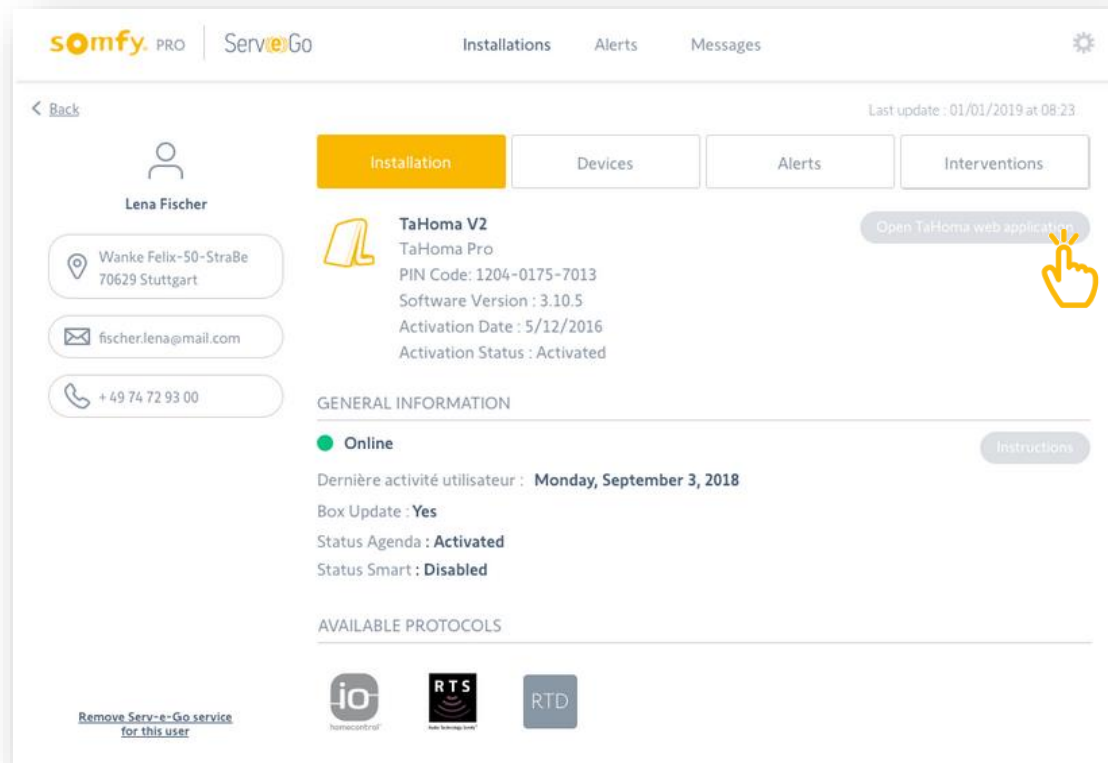


Search for the customer installation in your list of registered boxes.
Then click on the customer name to access the installation.

Access to the TaHoma web application is only possible if you have remote access to service the installation.
Make sure that your customer has validated the intervention request.

next →

2 Open TaHoma web application



From the tab "Installation", click on "Open TaHoma web application".

You will then be redirected to your customer's web interface.

No authentication will be required since your customer has already authorized you to access the installation.



next →

3 End remote intervention

End remote service ?

If you validate this comment, a new email will be sent to customer.

Interventions performed :

 Shutter Kitchen Kitchen	Quiet mode speed (rpm) : 6 Normal mode speed (rpm) : 12
 Shutter Kitchen Kitchen	Quiet mode speed (rpm) : 6 Normal mode speed (rpm) : 12

Include a comment (optional) :

End service **Cancel**

Once your actions have been carried out, click on "End service" in the lower banner.

A window will appear in which you will see the summary of your actions, and where you can leave a comment for your customer.

An email will be sent to your customer, informing them that your intervention is finished, detailing that you opened the web application.

Need help ?

Visit the Somfy Professional website in your country

Or contact local customer support