Motorized Shade Using A Single 2 ½" or 3 ⅛" Roller Tube Installation Instructions

Contents

Motorized Shade Using A
Single 2 ½" or 3 $\frac{1}{8}$" Roller Tube
Installation Instructions

This document provides installation Instructions for motorized, coupled shade systems. **Mounting screws are not provided.** The type and size of screw required will vary depending upon the mounting surface.

1.0 Tools
Screw gun with Phillips head bit extender; Standard and Phillips head screwdriver; wire strippers/cutters; pliers or channel locks; level; AC motor test switch; tape measure; $\frac{1}{8}$,$\frac{3}{16}$, and ½ inch drill bit; Duct tape.

2.0 Exposed Bracket (Single Tube)
2.1 Determine mounting position of shades
The order width is the bracket-to-bracket dimension. The exposed brackets are universal and the brackets can be inside or outside mounted for surface, and ceiling mount applications using the appropriate holes.
Inside mount is typically the opening width.
For outside mount, mark the location of the brackets noting that the outside bracket width equals shade width.

Idler Bracket   AC Motor Bracket   DC Motor Bracket

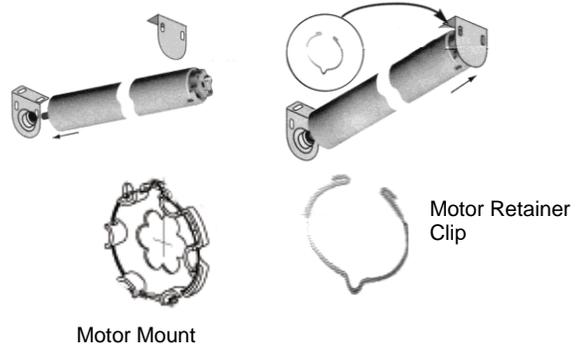Determine operator side as ordered.
For proper shade operation, brackets must be mounted level. Mount all brackets to surface or ceiling with a #10 or larger truss head, pan head or hex head screw. If head of screw is too small for the screw slot in bracket, add a washer (not provided).

2.2 Shade Installation
The motor retainer clip is shipped on the motor mount.
Do not remove the motor retainer clip from the motor bracket.

Insert the spring-loaded idler end of the tube into swivel ball on the idler bracket and fully compress the idler shaft. Align the motor into the motor mount ensuring the limit switches are accessible and the motor wire does not interfere with the shade operation.
Insert the motor into the motor mount until the motor retainer clip snaps around the motor head.

Motor Retainer Clip

Motor Mount

2.3 Setting Motor Limits
Any permanent electrical wiring must meet local electrical code.
Connect power to the motor.
Refer to the Radio Programming or Limit Switch Setting instructions for motorized shades. Run the shade up and down to insure smooth operation.
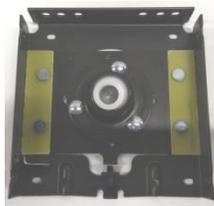
3.0 Fascia Bracket (Single Tube)

Installation options include fascia, fascia plus top/back cover, or top/back cover as reverse roll fascia.

3.1 Determine mounting position of shades

The order width is the bracket-to-bracket dimension. The mounting brackets are universal and the brackets can be inside or outside mounted for surface and ceiling mounts applications using the appropriate holes.

Idler Bracket   AC Motor Bracket   DC Motor Bracket

Inside mount is typically the opening width.

For outside mount, mark the location of the brackets noting that the outside bracket-to-bracket width equals shade width.

Determine operator side as ordered.

Plastic end plates that match the fascia color are available. When mounted to the outside of the fascia brackets, together, both end plates add a total of 1/8 inch to the bracket-to-bracket width.
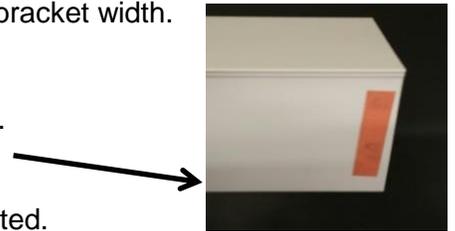
3.2 Top/back cover

On each end of the top/back cover is double sided adhesive tape as shown.

An orange strip of plastic protects the top of the adhesive tape.

The tape assists in holding the top/back cover and brackets together.

Do not remove the protective strip on the orange adhesive tape until instructed.
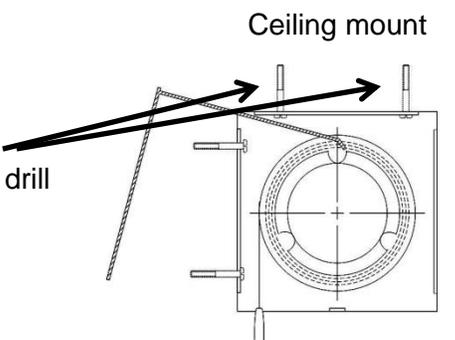
3.3 Top/back cover pre-drill
Ceiling mount

Ceiling mount

Slide the top/back into the left and right bracket so the top/back cover is underneath the top bracket flange.

Using the top of the bracket, mark the bracket holes on the top/back cover.

Pre-drill the marked holes in the top of the top/back cover using a 3/16 inch drill bit.

Surface mount

Surface mount.
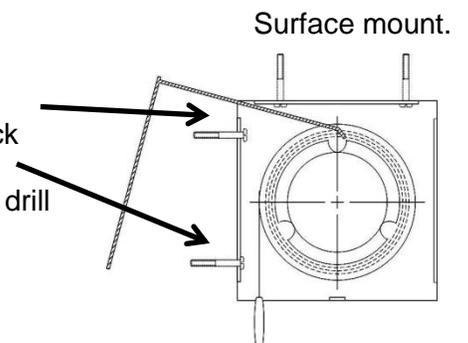
Slide the top/back into the left and right bracket so the top/back cover is underneath the top bracket flange.

Using the back of the top/back cover, mark the bracket holes on the top/back cover.

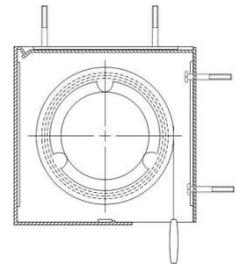Pre-drill the marked holes in the top of the top/back cover using a 3/16 inch drill bit.

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3.3A Top/back cover and bracket mount (Regular roll)

Remove the orange protective strip then slide the top/back cover inside the top of the bracket. Slide the top/back cover in the open bracket slot so the top/back cover is underneath the top flange of the bracket.
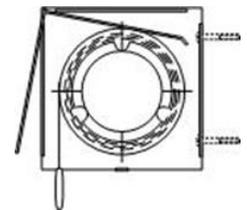
Mount the brackets and the top/back cover simultaneously to surface or ceiling using a #10 or larger pan head or hex head screws (not provided). If head of screw is too small for the screw slot in bracket, add a washer (not provided).

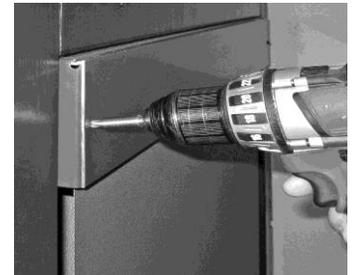### 3.3B Top/back cover and bracket mount (Reverse roll)

Fascia is not used in the application.

Remove orange protective strip from the top of the double-sided tape on the top/back cover. Slide the top/back cover in the open bracket slot so the top/back cover is underneath the top flange of the bracket. Install brackets and top/back cover at the same time.

This application requires a screw through the front of the reverse roll fascia. Pre-drill 1/8" hole through fascia into flange on steel bracket. Attach with provided #8 x 3/8" pan head screw.

Slide reverse roll fascia through the slot in the bracket and attach with included screw (#8 by 3/8)

3.2 Shade Installation

The motor retainer clip is shipped on the motor mount.
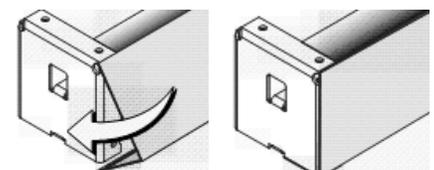Do not remove the motor retainer clip from the motor bracket.

Insert the spring-loaded idler end of the tube into swivel ball on the idler bracket and fully compress the idler shaft. Align the motor with the motor mount ensuring the limit switches are accessible and the motor wire does not interfere with the shade operation. Insert motor into motor mount until motor retainer clip snaps securely around the motor head.

Any permanent electrical wiring must meet local electrical code. Connect power to the motor.

3.3 Setting Motor Limits

Refer to the Radio Programming or Limit Switch Setting instructions for motorized shades. Run the shade up and down to insure smooth operation

For regular roll shades, snap on the fascia. Hook the lip of the fascia over the end brackets and swing the fascia down until the bottom of fascia snaps securely into place.
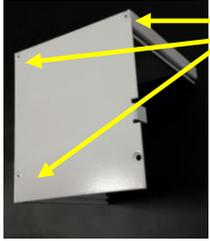
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4.0 Pocket Installation (Single Tube, Five by Five and ½ inch pocket)

4.1 End Plate

In most cases, assemble the head box before installation. Secure the end plates to the back cover using six #6 by 3/4 stainless steel self-tapping screws (supplied).

4.2 Back cover mount

The top of the back cover is mounted at the order height. Use a 3/16 drill bit and pre-drill holes in the top/back cover for easier installation. Secure the back cover using intermediate mounting points spaced four to six feet apart.

For surface mount, screw the back cover to mounting surface using #8 x 1 ½ inch or longer pan-head screws (not provided). Ensure that the back cover is level. Be careful not to over-tighten screws as this may cause damage to the back cover.

For ceiling mount, the head box must be fully assembled before installation. Insert the front cover tongue into the back cover groove. After correctly inserting the front cover in the groove, the front cover will stay engaged as it closes. Secure the front cover to the end plate using the remaining screw position.

4.3 Bracket mount

Align the motor bracket in between the bracket location ridge in the back cover extrusion.

For ceiling mount, align the bracket to the top of the back cover flush with the end plate. Mark the box. Repeat this alignment and marking process for the idler bracket. Pre-drill all the bracket holes with a $\frac{3}{16}$ inch drill bit.
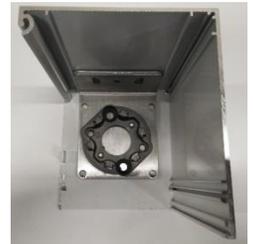
For surface mount or outside mount, align the motor bracket on the back of the back cover flush with the end plate. Mark the box. Repeat this alignment and marking process for the idler bracket. Pre-drill all bracket holes with a $\frac{3}{16}$ inch drill bit.

Mark and drill a hole either through the top or back of the back cover or the end plate for future routing of the motor wire. Use a $\frac{3}{8}$ inch or ½ inch drill bit depending on diameter of wire. Use of a rubber grommet in the drilled hole is recommended to protect the motor wire.

Mount all brackets. Screw brackets to surface or ceiling mounting surface through the back cover with #10 x 1 ½ inch or longer pan-head screws (not provided).

4.4 Front cover

Insert the front cover tongue into the back cover groove. After correctly inserting the front cover in the groove, the front cover will stay engaged as it closes. Secure the front cover to the end plate using the a #8 by ½ inch painted stainless steel self-tapping screws (supplied).

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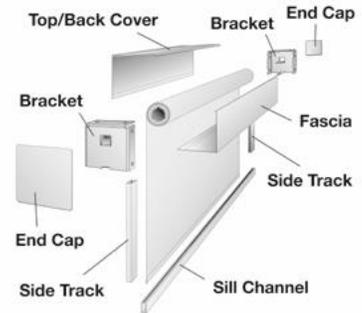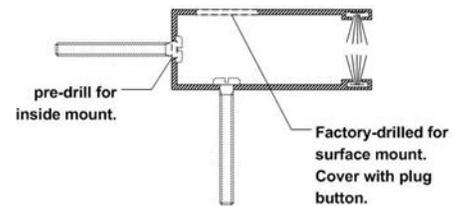
5.0 Optional Hardware

5.1 Sidetrack
Align the outside track width with outside bracket width. Use a level to make sure tracks are plumb.

For surface mount installations, screw through pre-drilled sidetrack. Snap plug buttons over hole when complete.

For inside mount installations, pre-drill side rail at desired locations before screwing to window jamb.
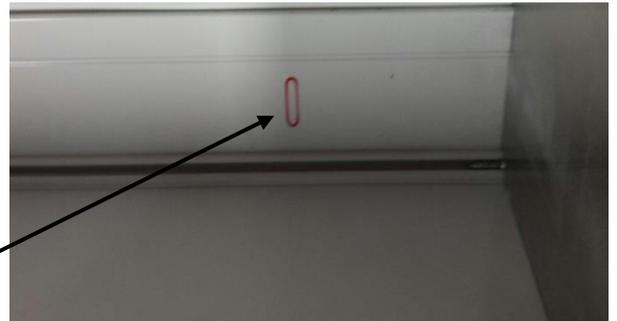

5.2 Valance (Six Inch) Installation
The six inch valance accomodates a single or dual shade system.

5.2A. Inside Mount and Ceiling Mount Application for Six-Inch Valance
No end plates are included with an inside mount application.

1. Determine the location of the idler bracket and the motor bracket. Follow Exposed Roller Shade installation step 1.

2. Hold the valance at the desired location to ensure shade clearance and proper fit for single or dual shade application. Valance may be flush with front of opening or inset to desired location.

3. Pre-drill $^3/_{16}$ inch holes in the 1½ inch top return of the valance in the extrusion guide groove for direct mount or when using an L bracket when applicable. When using L brackets, recommended spacing between brackets is a maximum of 36 inches. Mount the shade bracket in an orientation as dictated by the application.

4. Place valance into opening. Secure the valance by screwing through the top of the valance into the dry surface/trim. Screws not provided.
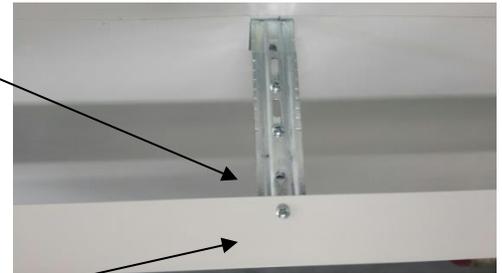
5.2B. Outside Surface Mount Application for Six-Inch Valance
    End plates are included for an outside mount application

1. Secure the end plates to the valance with supplied mounting screws. Hold the valance at the desired location to ensure shade clearance and proper fit.
2. Determine the location of the shade brackets. Mount shade brackets per Exposed Roller Shade installation step 1.

3. Determine the location of the L-brackets. Recommended spacing between L brackets is a maximum 36 inches. Mount L-brackets.

4. The top of the L-bracket must be mounted underneath the 1½ inch return.

    Dry fit valance on L-brackets to determine the pre-drill hole location. Loosen L Bracket adjustable screws as required for ease of installation.
    Pre-drill $^3/_{16}$ inch holes in the 1 ½ inch top return of the valance in the extrusion guide groove.

    Place valance into opening. Using the supplied fasteners, secure the valance to the L-brackets. Position the valance so the end plates are flush with the mounting surface and firmly tighten the L bracket adjustable screws. Mount roller shade back on brackets.

5.3 Paramount Valance Installation
    Refer to the Paramount Valance Installation Instructions for details.

6.0 Troubleshooting
6.1 Telescoping In Shade
1. To adjust shades for telescoping (excessive horizontal movement of fabric while shade rolls up on the tube), roll shade all the way down so tube is exposed (this will require removal of motor down stop limit).

2. Place a 4" piece of tape (2"-4" in from the end of shade) on the side of the tube opposite of the direction the fabric is moving.

3. Run the shade up. If shade still telescopes, repeat the process. The correct amount of tape can only be determined by trial and error.

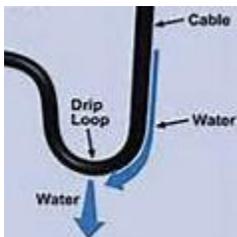4. Re-set the down limit after completing shade adjustments.

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6.2 Operation of Motorized Shades

1. To open shade or close via surface switch or remote control, user should have line of sight view of shades being operated. User should make sure the shades do not contact any obstruction.

2. If any shade binds up or hits an obstruction, the shade operation should be switched off immediately.

3. Motors should not require any lubrication. If motor ceases to work, electrician is required to ensure that problem does not exist with wiring. If motor overheats, thermal overload will activate shutting off motor until it cools down. Motor will return to normal operation.

6.3 Important Notes for the Electrician

1. An Underwriters Lab (UL) Listed cable clamp or cable gland must be used that is suitable for the diameter of the cable. The outside diameter of the motor cable is nominally 0.340 inches (8.64mm). This will ensure that the connection between the motor cable and the junction box is stable and reduces strain on the conductors.

2. Any switch, connector, and/or junction box should be UL Listed.

3. For motorized shades provided with a NEMA 5-15P plug cap, the plug cap must be inserted into a grounded receptacle. To reduce the risk of electrical shock, this equipment has a grounding type plug that has a third (grounding) pin. This plug will only fit into a grounding type outlet. If the plug does not fit into the outlet, contact a qualified electrician to install the proper outlet. Do not change the plug in any way."

4. Any electrical wiring that is designed to be permanent shall be installed as required by local codes.

5. Ensure there is adequate drip loop length so no condensation can travel to the motor head. An example of a drip loop is shown below:

Insolroll has been granted a UL Listing for complete motorized shade systems including any of six upgraded motors (Model #s STD-AC, STD-ACR, STD-AC-ILT, IQM-AC, IQM-ACR, and IQM-AC-ILT).