



Oasis® 2700 Patio Shade Installation Instructions

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The Oasis® 2700 Patio Shade system is available in a complete head box with a cable guide and two types of operators (clutch or motorized). This document provides installation instructions for all shade systems.

Order height is defined as the distance from the top of the back cover to the bottom of the cable guide. Verify the window opening versus the shade order size before installation.

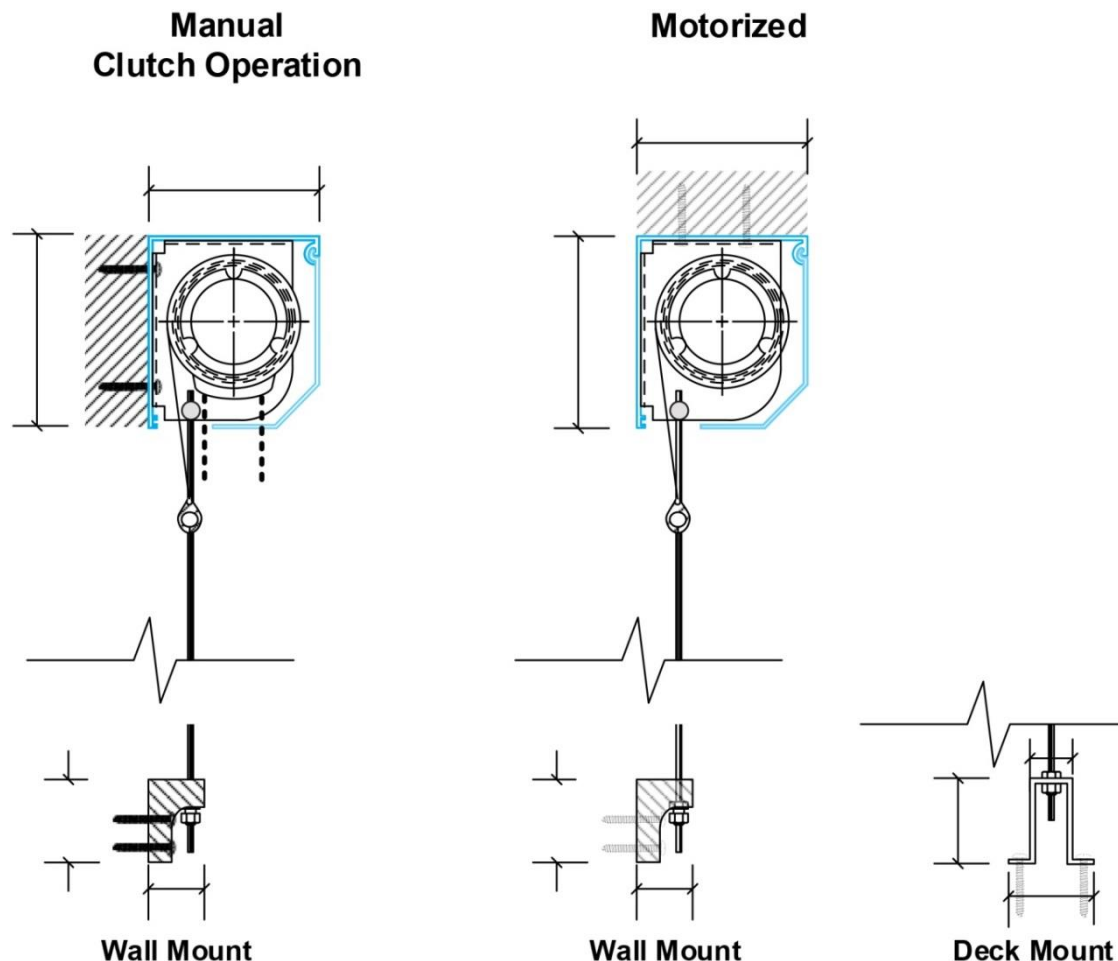
1.0 Tools

Screw gun with Phillips head bit extender; Hex nut driver (7 mm); Standard and Phillips head screwdriver; wire strippers/cutters; pliers or channel locks; level; AC motor test switch; tape measure; $\frac{3}{16}$ inch drill bit; $\frac{3}{8}$ inch drill bit, Duct tape.

2.0 Traditional Head Box

2.1 Mounting Options

Cable wall mount and cable deck mount is an option for manual and motor applications.





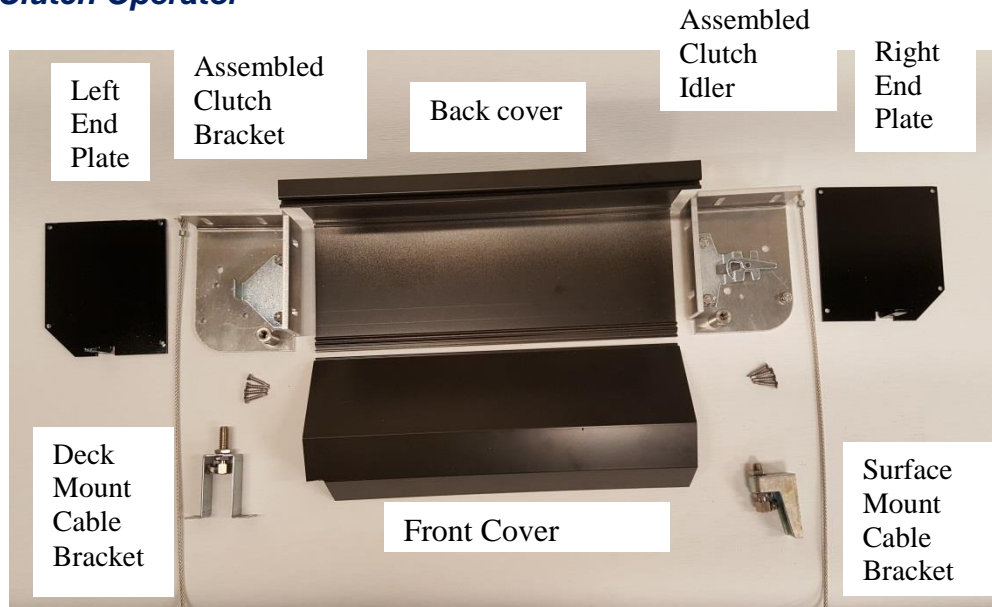
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2.2 Shipped Components

The roller shade (tube, fabric, and clutch or motor) rests in the back cover. The front cover rests in the back cover.

Depending on the application, the following components are included in the shipment:
Left and right end plates, fully assembled idler bracket, fully assembled motor bracket or, fully assembled clutch bracket, hembar, grommet, cable guide components, and extra end plate screws.

Clutch Operator



Motor Operator





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2.2 Shipped Components (Continued)



Cable Tension
Lock
Components

Grommet



Cover
Plate
Screws

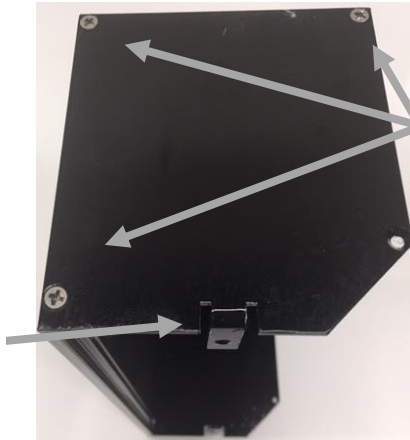


End Plate
Screws

3.0 Assembly and Installation Instructions

3.1 End Plate Assembly

End plates are not attached to the back cover prior to shipment. Place the back cover on a flat, clean surface (cardboard box, saw horses, or other). Align the end plates so the tangs are facing each other. The tang faces toward the inside of the head box for the left end plate shown below.



Carefully secure each end plate to the back cover with three painted, #6 by 3/4 inch stainless steel sheet metal screws (supplied).

3.2 Upper Cable Guide

The cable guide is shipped in a kit with deck mount and/or surface mount hardware. Mount the cable guide to each bracket using the supplied M6 Phillips flat head screw.

One end of the supplied cable is crimped with a metal sleeve. Feed the un-crimped end of the cable through the top of cable guide so that the crimped end of the cable rests on the cable guide.

Repeat this process for the other bracket. The clutch operator bracket is shown in the picture to the right.



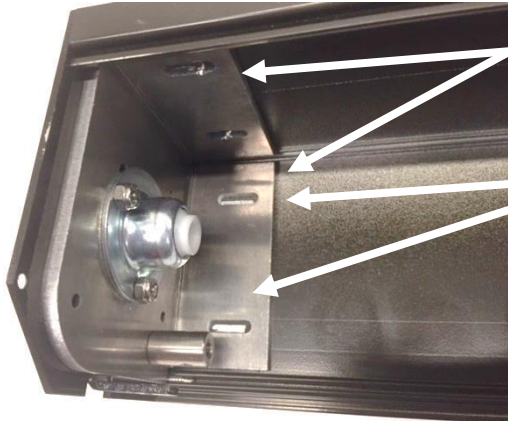


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3.3 Bracket Hole Marking on Back Cover

Prior to marking the motor and idler bracket holes, plan the location of the power cable for motorized shades.

3.3A Motor or Clutch and Idler Bracket Marking



Align the motor/clutch and idler bracket so both flanges contact the back cover and the face of the bracket is seated against the end plate.

Mark the two oval screw hole locations on the back cover for either surface mount or ceiling mount.

The idler bracket is shown in the picture to the left.

3.3B Pre-Drilling Bracket and Motor Wire Holes

Pre-drill all the bracket holes using a $\frac{3}{16}$ inch drill bit. The resulting hole will accept a #10 screw (not provided).

Mark and drill a hole using a $\frac{7}{16}$ inch drill bit either through the motor bracket and end plate (recommended) or through the top or the back of the back cover for future routing of the motor power wire. A supplied grommet fits in the back cover or end plate. Insert the grommet depending on the application.

3.4 Back Cover Installation

Measure the height and width opening, and verify window dimensions. Confirm order size.

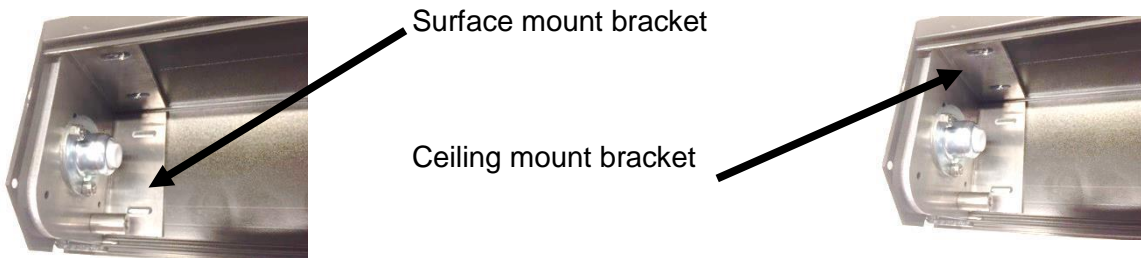
Mark back cover location for intermediate mounting points. Recommended spacing for intermediate mounting points is four to six feet apart depending on width of the back cover.

Pre-drill the marked locations using a $\frac{3}{16}$ inch drill bit for easier installation.

Secure the back cover to the mounting surface in the pre-drilled holes using #8 x 2 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.

3.5 Bracket Installation

Screw brackets to the mounting surface through the back cover with #10 x 1 ½ inch or longer pan-head screws (not provided). Other screw types might be required depending on mounting surface.





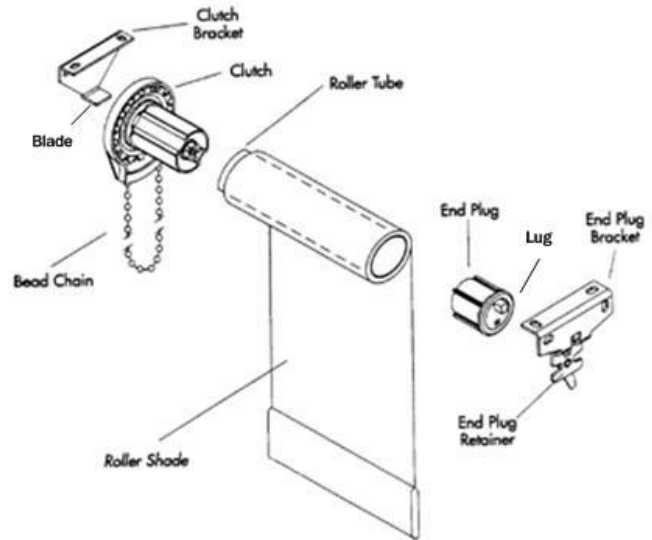
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3.6 Shade Installation

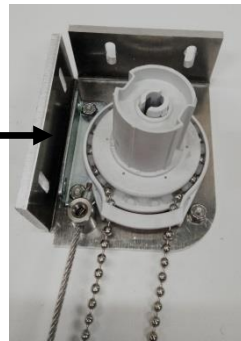
3.6.A Clutch Operator

Due to the design of the clutch bracket, the clutch can only fit on the blade in one orientation.

Install the shade by pushing the clutch directly onto the blade of the bracket.

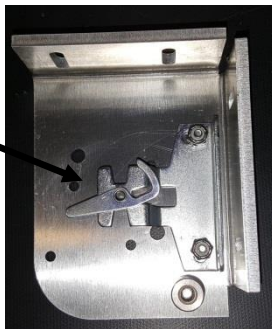


Install the clutch so the chain hangs straight down.



Lower the lug of the end plug onto the “V” of its bracket. The roller shade should fit securely in the idler bracket, with just a little play.

Rotate the riveted retainer portion to lock the lug in position.

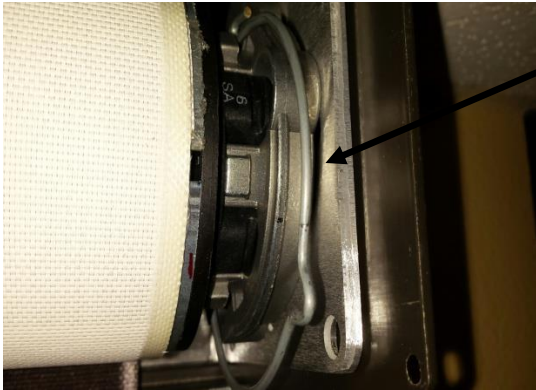


Remove the protective wrapping from the shade.

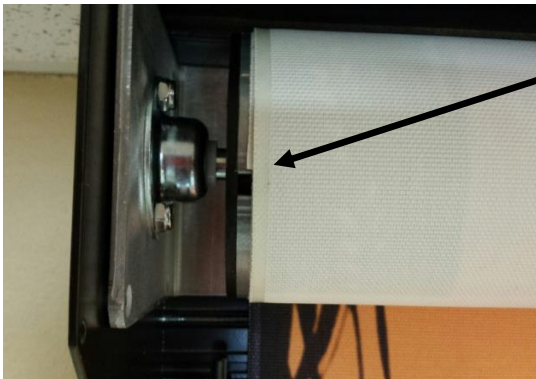


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3.6.B Motor Operator

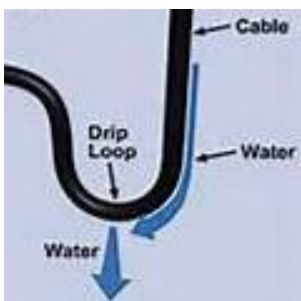


Remove the motor retainer clip from the motor mount.



Install the shade into the head box by inserting the spring idler into the spring idler bracket, compressing the spring, and inserting the motor drive into the motor drive bracket ensuring that the motor limit buttons are accessible as required. Remove the plastic sleeve protecting the shade

Slide the power wire through the previously drilled hole, so it does not interfere with the shade operation.



Ensure there is an adequate drip loop length so no condensation can travel to the motor head. Refer to the section named Important Notes for Electrician at the end of this document

Re-attach the motor retainer clip.

Remove the protective wrapping from the shade.

Connect the motor power cable to a UL listed switch, connector, junction box, and/or test switch (not included) that supports 110V AC operation.

Refer to the programming instructions included with product shipment for AC and ACR motors.



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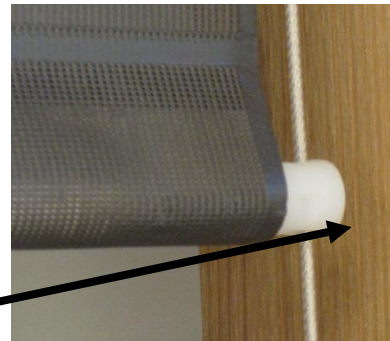
3.7 Hembar Installation



Roll the shade down Insert hembar into the hem pocket at the bottom of the fabric.

Hembar pop rivets face toward the back.

Slide cable through hembar cable guide inserts



3.8 Cable, Lower Cable Guide, and Deck Mount Installation

Cable and lower cable guide installation is required for both operator (clutch or motor) and idler bracket.

Remove cable guide brackets (either surface mount or deck mount) from the plastic bag.

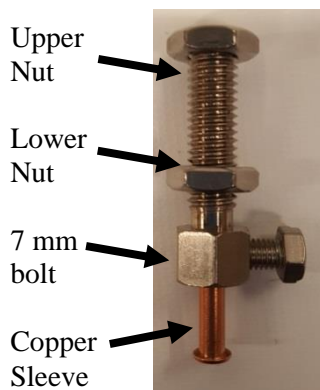
For a surface mount application, attach surface mount brackets at bottom of the shade. The surface mount bracket is installed with the mounting leg facing up or down depending upon installation requirements.



For a deck mount application, attach deck mount brackets to the deck surface at the bottom of the shade location.



Vertically align the cable guide brackets with the upper cable guide hole in the operator and idler bracket.



Remove threaded cable lock assembly from plastic bag.

Remove the upper nut.



Insert threaded assembly into bracket hole.

Re-attached the upper nut and tighten the lower nut to expose the maximum amount of thread length for cable tension adjustment.





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3.8 Cable and Lower Cable Guide Installation (Continued)



Pull the cable taut beside the surface or deck mount bracket.

Cut the bottom of the cable as shown.

Remove the sheathing off the cable with a 12-gauge wire stripper.

Slide the copper sleeve up on the cable until it stops in the cable tension lock.

Using a pair of pliers, pull cable taut and tighten the 7 mm bolt. This screw must be completely tight to crush the copper sleeve in cable lock.

Loosen the upper nut and tighten the lower nut to adjust the cable tension.

Do not over tighten. Re-tighten the upper nut.

After tightening the cable, trim excess cable below cable lock with diagonal pliers (leave a minimum of 1" of cable exposed).

3.9 Chain Guide Installation

Metal Select Chain Guide is a chain tension device designed for inside or outside mounts.

The installer must release and install this chain guide for the shade to be operational.

The chain is inserted through the chain guide and connected at the factory prior

Squeeze both flanges to open the chain guide then slide the chain guide down to the bottom of the chain loop.



Mount the chain guide so there is some slack in the chain so it is easier to lower and raise the shade. With both flanges open, secure the chain guide by installing the lower screw (#8 self-tapping screw provided).

If the chain guide is not opened before attaching it to the mounting surface, or the top screw is attached first, the chain will over-tighten and may make shade operation more difficult.

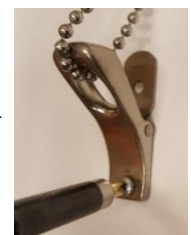
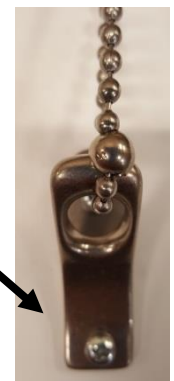
The #8 self-tapping mounting screws (provided) are designed for installation in wood trim, drywall, or aluminum mullion.

After attaching the bottom screw, operate shade to ensure smooth operation.

Use a 3 1/2" extended screw bit to ensure the bit does not catch on the chain.

Attach the top screw through the chain guide opening.

Attach chain stops for upper and lower limits of the shade.





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3.9 Chain Guide Installation (Continued)

Young children can wrap cords around their necks and STRANGLE.

- Keep all window cords well out of the reach of children.
- Move all cribs, beds, furniture and toys away from windows with cords.



4.0 Final Adjustments

4.1 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 before tightening sidetrack screws. Re-measure tracks at top, middle, and bottom. Check sidetracks with a level to make sure they are plumb.

Tolerances are very tight.

Set up and down limit as required. Remove the test switch and connect motor power wire.

4.2 Troubleshooting – Telescoping Shade Adjustment

To adjust shades for telescoping (excessive horizontal movement of fabric while shade rolls up on the tube), roll the shade all the way down so the tube is exposed (this will require adjustment of the down limit).

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.

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

Re-set the down limit after completing shade adjustments.



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5.0 Front Cover 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.



If accessible, screw the end plate to the front cover.

For inside mount application and end plate screw holes are not accessible, secure the front cover to the end plate tang.

Roll the shade down to the lower limit. Drill a hole in the front cover through the end plate tang with a $\frac{1}{8}$ inch bit. Next, secure the front cover with a $\frac{3}{8}$ inch painted sheet metal screw (supplied).

For wider shades, the two installers are positioned approximately $\frac{1}{3}$ the distance from each end to ease the installation of the front cover.

6.0 Important Notes for the Electrician

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.

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

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."

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

Ensure there is adequate drip loop length so no condensation can travel to the motor head. A drip loop example 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).