

# Patio Shade Installation Instructions

## 1.0 Overview

The following installation instructions are for 's patio shades. This product is only offered in a 4" x 4 1/2" Head Box, it is not available in exposed. The operator options available are: Somfy Motors, Manual Crank & Gear and Lutron Electronic Drive Unit. The fabric guides available are: Side Track and Cable Guide. Hardware and enclosure assembly screws are included, but mounting screws are not provided. The type and size of screw required are project specific and will vary depending upon the mounting surface.

## 1.1 Tools

Screw/drill gun with Phillips-head bit extender; hex head driver; standard and Phillips-head screwdriver; wire strippers/cutters; pliers or channel locks; level; tape measure; 3/16" and 3/8" drill bits; appropriate fasteners for your specific application.

## 2.0 Enclosure Mounting

### 2.1 Back Cover Assembly

Locate the back cover, end plates and the end plate hardware. Mount the left and right end plates to the back cover using six of the eight screws provided. The two end plate screws that are left will be used to secure the front cover at the end of the installation.



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## 2.2 Pre-Drill Mounting Holes

Mark the back cover mounting locations. Start by marking the two end mounting locations on the inside of the back cover about 6" in from each end plate. If the back cover is longer than 6', mark intermediate mounting locations 4' to 6' apart. Mounting locations for ceiling mount applications will be on the top of the back cover while for wall mount applications they will be located on the back of the back cover. Pre-drill the holes using a 3/16" drill bit.

Ceiling Mount



Wall Mount



Mark the bracket mounting locations on the back cover. Place the operator and idler brackets in the channels of the back cover. Mounting locations for ceiling mount applications will be on the top of the back cover while for wall mount application they will be located on the back of the back cover. Pre-drill the holes using a 3/16" drill bit. Only operator brackets are shown.

Ceiling Mount



Wall Mount



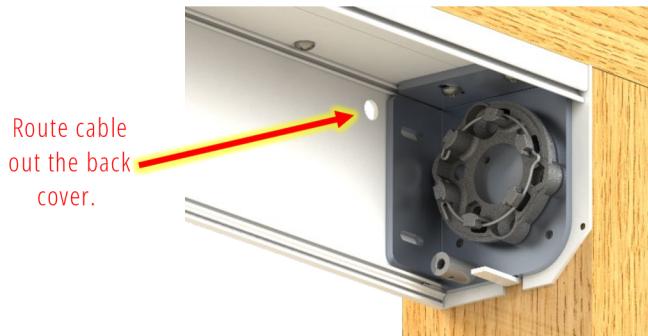
# Patio Shade Installation Instructions

## 2.3 Drill Motor Cable Routing Holes

If you are installing a manual crank shade, skip this section and proceed to section 2.4 Upper Cable Retainer Install.

Think through the motor wire routing plans for your application and determine the location of the motor cable hole. For information on the size of hole needed, refer to section 9.0 Somfy Motor Wire Options. The images below show typical applications for inside ceiling mount and outside wall mount applications. These images may not apply to you as each application can be different.

Inside Ceiling Mount



Outside Wall Mount



## 2.4 Upper Cable Retainer Install (For Cable Guide Systems ONLY)

Locate the upper cable retainer and the corresponding screw in the cable hardware package. Use the following images to install the cable retainer in the correct orientation for your application.

Somfy Motor



Manual Crank



Lutron EDU

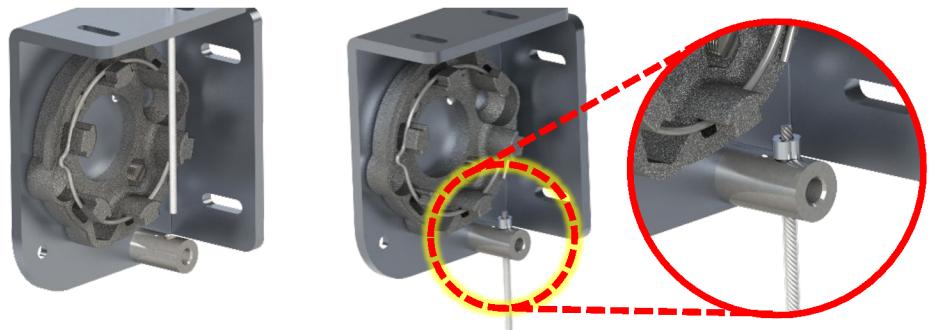


Spring Idler



# Patio Shade Installation Instructions

After installing the cable retainer, feed the un-crimped end of the stainless steel cable through the cable retainer. Pull the cable through the cable retainer until the crimped end of the cable sits against the cable retainer.



## 2.5 Head Box and Bracket Mounting

Mount the head box first using the pre-drilled holes in section 2.2 Pre-Drill Mounting Holes. Use a level to ensure the head box is mounted completely level.

We recommend pan head screws for mounting and advise you to stay away from using deck screws to mount the back cover and brackets. Mounting screws are not provided. The type and size of screw required are project specific and will vary depending upon the mounting surface.

Ceiling Mount



Wall Mount



# Patio Shade Installation Instructions

Insert and mount the operator and idler brackets using the pre-drilled holes in section 2.2 Pre-Drill Mounting Holes. Only operator brackets are shown.

Ceiling Mount



Wall Mount



## 2.6 Operator Bracket Orientations

All operator and idler bracket assemblies are shipped pre-assembled and should not need to be oriented differently. If you need to change operator sides, reference the holes that were used on the shipped assembly while orienting the operator and idler mounts on the brackets.

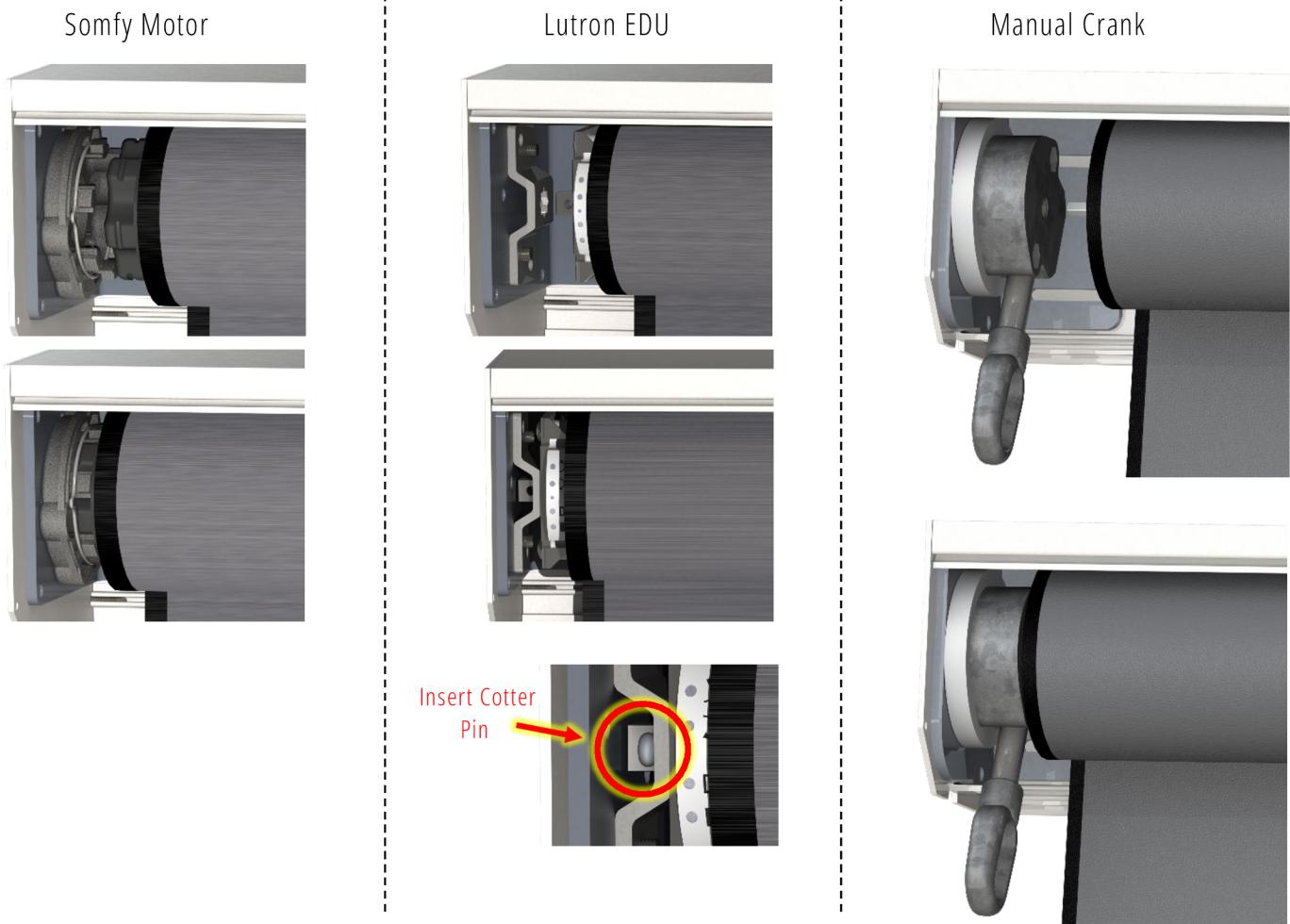
## 3.0 Shade Installation

Install the shade by carefully inserting the idler pin into the plastic ball on the idler bracket and compress the idler so the operator clears the operator bracket.



# Patio Shade Installation Instructions

Align the operator to fit into the operator bracket. Ensure it is fully seated. For Somfy operated shades, ensure you hear the retaining ring snap into place. For Lutron operated shades, insert the provided cotter pin to hold the EDU in place.



# Patio Shade Installation Instructions

## 3.1 Motor Cable Routing

### 3.11 Somfy Motors

For standard motor wires (hardwire and molded plug), route your motor cable through the hole that was drilled in section 2.3 Drill Motor Cable Routing Holes. Place the grommet over the cable and insert it into the drilled hole. Then run your wire to the power source.

For fast connect wires, route your motor cable through the hole that was drilled in section 2.3 Drill Motor Cable Routing Holes. Place the grommet over the cable and insert it into the drilled hole. Then attach the female connector to the male connector and run the wire to the power source.

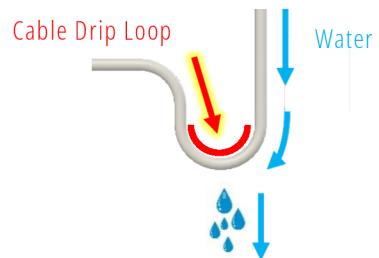


### 3.12 Lutron EDU

Lutron EDU shades are offered in wired and wireless configurations. For RF Dongle information please refer to the Lutron Sivoia QS Wireless Receiver Install Instructions. For wired systems, please refer to the Lutron Sivoia QS Basic Wiring and Setup Instructions. Single power supply specific information can be found in the Plug In Power Supply WIN Instructions, while multi power supply information is in the Lutron Sivoia QS Wiring and Programming Guide.

### 3.13 Drip Loop

Always orient the power wire 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.



## 3.2 Shade Removal

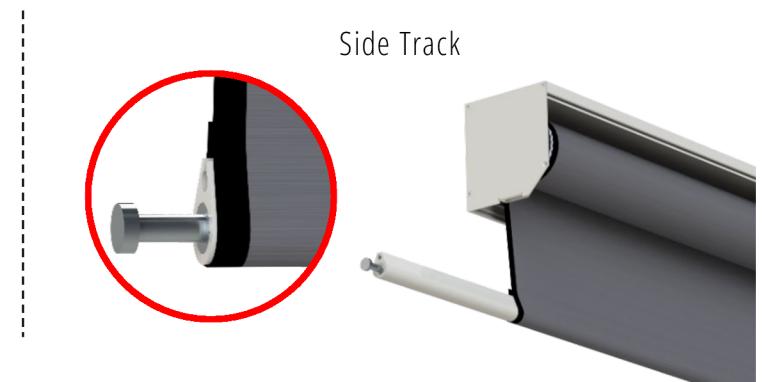
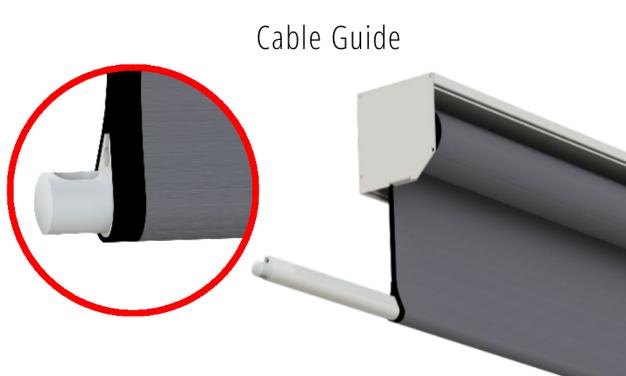
To remove the shade, reverse the above installation instructions. Begin by, removing the retaining ring or cotter pin if applicable. Move the shade toward the idler to compress the idler enough so that the operator clears the operator bracket. Remove the idler pin from the idler bracket.

# Patio Shade Installation Instructions

## 4.0 Fabric Guide Installation (Cable Guide and Side Track Installation)

### 4.1 Hem Bar Installation

The patio shade line is offered with either cable guide or side track. Both fabric guide options utilize the same hem bar, but the ends of the hem bar guide will vary. Side track systems will utilize metal guide pins while the cable guide systems will utilize nylon cable guide pins. Slide the hem bar through the hem bar pocket of the shade. Ensure it is centered in the hem bar pocket.

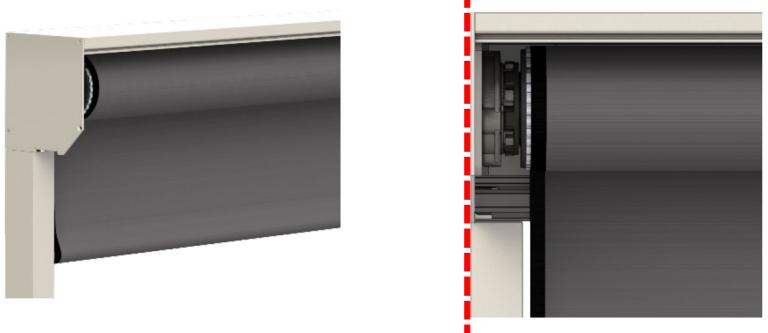


### 4.2 Side Track Installation

Begin by guiding the metal hem bar pins through the side track. The hem bar should fit relatively loose in the side track.



Align the side tracks with the ends of the enclosure. The side tracks should sit flush with the back and sides of the enclosure.



Sits flush

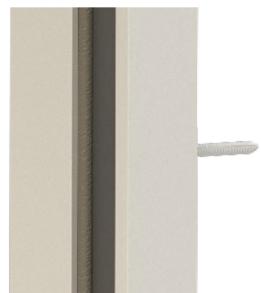
# Patio Shade Installation Instructions

The side tracks will be shipped with pre-drilled mounting holes (unless specified not to pre-drill when ordering). The pre-drilled hole location will depend on whether the side tracks were ordered for face mount or side mount installation. Use a level and tape measure to ensure the side tracks are mounted perfectly vertical and parallel to each other before fully securing each side track.

Face Mount



Side Mount



## 4.3 Lower Bracket Installation

Begin by guiding the cable through the nylon cable guide pin on the operator side. Repeat the process on the idler side.



offers two options for lower cable brackets: deck mount and wall mount. Use the cable to determine your bracket location. Use a tape measure to ensure the cables run parallel to each other. Use a level to ensure the cables also run completely vertical. Mount the lower cable brackets in the determined location that will allow the cables to run parallel and vertical. Mounting screws are not provided. The type and size of screw required are project specific and will vary depending upon the mounting surface.



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Deck Mount



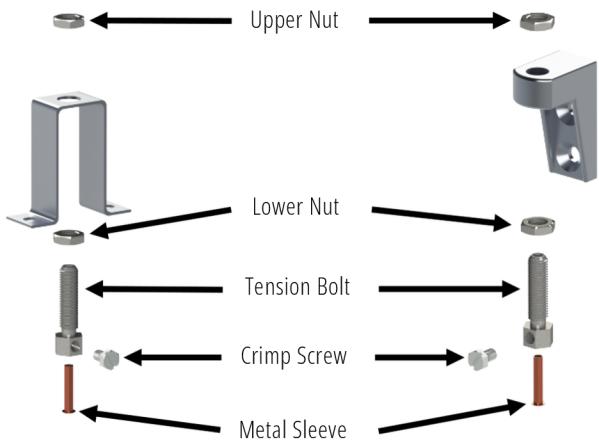
Wall Mount

# Patio Shade Installation Instructions

## 4.31 Tension Bolt Assembly

Locate the cable guide tensioning hardware bag included in your shipment.

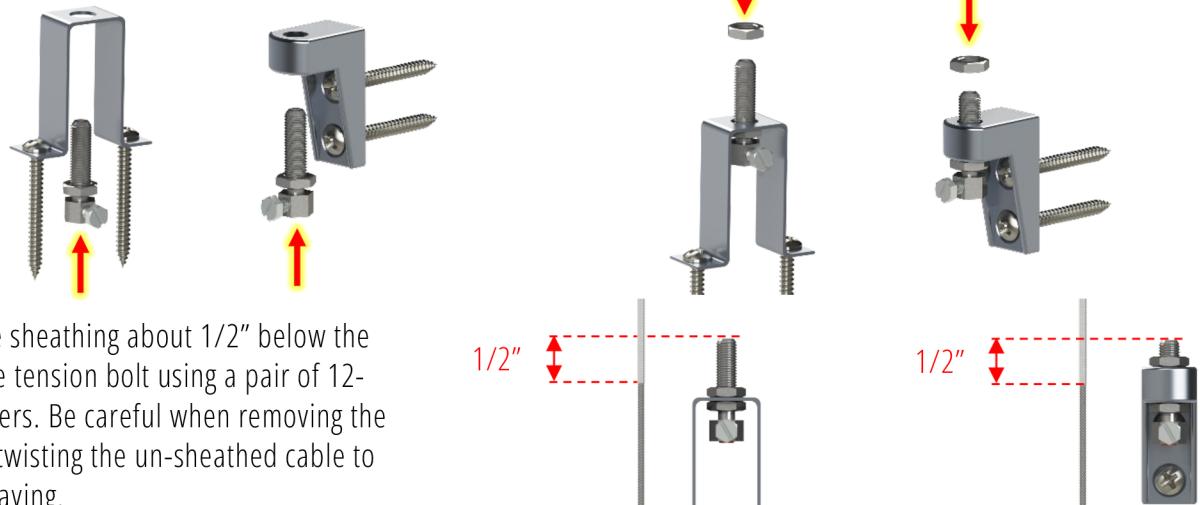
Remove the metal sleeve and place it through the hole on the head of the tension bolt and hand tighten the crimping screw to hold the metal sleeve in place. Do not overtighten the screw, it should only be tight enough to keep the metal sleeve from falling out of place.



Place the lower nut on the tension bolt. Be sure it remains threaded on the lower part of the bolt.



Insert the tension bolt assembly into the mounted bracket, so the crimping screw is accessible. Screw on the upper nut to hold the assembly in place.



Remove the cable sheathing about 1/2" below the top threads of the tension bolt using a pair of 12-gauge wire strippers. Be careful when removing the sheathing. Avoid twisting the un-sheathed cable to prevent it from fraying.

Feed the cable through the top of the tension bolt. Pull the cable taut and tighten the crimping screw using a flat-head screwdriver or a 5/16" socket. To avoid damaging the head of the screw, do not over tighten. The cable is now set.

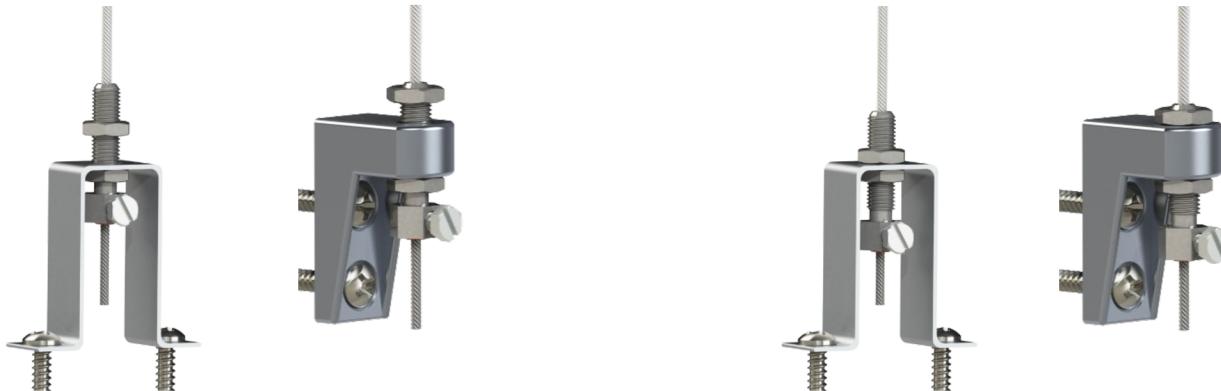


# Patio Shade Installation Instructions

## 4.32 Adjusting Cable Tension

To adjust the cable tension, loosen the upper nut using a 1/2" wrench. Once the upper nut is loose, begin tightening the lower nut so it pulls the tension bolt down through the bracket.

As the tension bolt gets pulled through the bracket, the cable will become taut. Check the cable tension while adjusting to ensure it does not become too tight. Once the desired tension is reached, tighten the upper nut back down to hold everything in place.



## 5.0 Shade Operation

### 5.1 Motorized Shades

Ensure your shade is set to the correct pre-set limits. If the limits need to be adjusted, please refer to the Motor Programming Instructions. strongly advises against using any sensors (wind, sun, etc.) or programming any scheduled or timed events with our products.

### 5.2 Manual Crank Shades

To set the lower limit, start by cranking the shade down to the desired down position.

Compress the shade against the idler side and completely remove the square crank drive pin from the gear.

While the pin is out of the gear, continue cranking the gear in the downward direction until you cannot crank any further.

Re-insert the square crank drive pin into the gear. The shade should now be at its desired lowest position and the crank should not crank down any further. The down limit is now set.

Note: There is no upper limit on manual crank operators. Please inform the customers accordingly.

# Patio Shade Installation Instructions

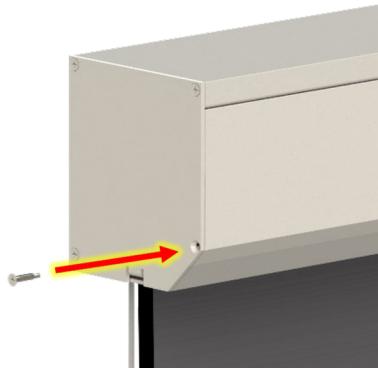
## 7.0 Front Cover Installation

### 7.1 Head Box Front Cover

Insert the front cover tongue into the back cover groove, the front cover needs to be perpendicular in order to fit properly into the groove of the back cover. After correctly inserting the front cover into the groove, the front cover will stay engaged as it closes. Secure the end plate to the front cover with the end plate screws provided.



For outside mount: Secure the end plate to the front cover with the end plate screws provided.



For inside mount: If you cannot access the end plate's crew holes for inside mount applications, use a 1/8" drill bit to pre-drill through the bottom of the front cover and the end plate tab. Secure the front cover using the provided 3/8" painted screw.



## 8.0 Fabric Telescope Adjustment

Fabric telescoping is excessive horizontal movement of fabric while shade rolls up on the tube. Shades are tested and fabric telescoping is adjusted prior to shipment, but additional adjustments may be required depending on each specific application.

If fabric adjustments are required, roll the shade all the way down so the tube is exposed. This will require adjustment of the lower limit using the Motor Programming Instructions for motorized shades. For manual crank shades that have set limits, you will have to change the lower limit before proceeding. Refer to section 5.2 Manual Crank Shades for more information.

Place a piece of duct tape, 2"-4" in length, near the edge of the tube on the side opposite of the direction the fabric is moving.

Run the shade up and down a few times. If the shade still telescopes, repeat the process. The correct amount of tape can only be determined by trial and error. Re-set the lower limit after completing shade adjustments.

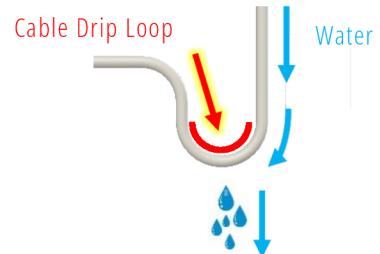
# Patio Shade Installation Instructions

## 9.0 Somfy Motor Wire Options

offers a wide range of motor wires to accommodate most applications. Standard wires are single wires that route from the motor directly to the power source. Fast Connect wires come as two separate wires, a male connector and your choice of the three available female connectors.

### 9.1 Drip Loop

Always orient the power wire 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.



### 9.2 Standard Motor Wire Options



Molded Plug

Great for plug and play applications.

Requires a 1 1/4" hole to be drilled in order to route through the enclosure. (No grommet included)

Readily available in four lengths: 18", 6', 10', 24'



Hardwire

Most versatile option available. Direct wire into J-box or add a universal wall plug for plug and play applications.

Requires a 3/8" hole to be drilled in order to route through the enclosure. (Grommet is included)

Readily available in one length: 24'

### 9.3 Fast Connect Motor Wire Options

Male Connector



Connects the motor to any of the three available female connectors.

Requires a 7/8" hole to be drilled in order to route through the enclosure. (Grommet is included)

Only available in one length:

19"

Female Connector Options



Molded Plug

Great for plug and play applications.  
Readily available in one length: 8' 4"



Hardwire

Most versatile option available. Direct wire into J-box or add a universal wall plug for plug and play applications.

Readily available in one length: 8' 4"



J-Box Wall Plate

For applications where J-box is within 1' from the motor side of the shade.

Only available in one size where wires on the back are 4" long and the connector protrudes 2" from the front of the plate.