Rollstar Shade with 4040 Fascia
Installation Instructions

Thank you for purchasing your new *Rollstar™* shade. It has been custom-made from the highest quality materials to the dimensions you specified. With proper installation and care, it will provide you with many years of beauty and trouble-free use.

Tools Required

- Metal measuring tape
- Level
- Awl or pencil
- Ladder or stepstool
- Motor tester (if shade is motorized). A motor tester can be purchased from Castec.

- Power drill with the following bits:
  - 1/4″ hex driver with extended shaft (8″–12″)
  - Phillips screwdriver
  - 1/16″ drill bit
  - Masonry drill bit (if mounting surface requires)
- Needle nose pliers

Important Information on Fasteners

The shade components must be securely attached to the mounting surface. The self-tapping screws included can be used in wood or metal. When installing to a wood surface, drill 1/16″ pilot holes before setting the screws. When installing to metal, use self-tapping screws or predrill 1/8″ holes.
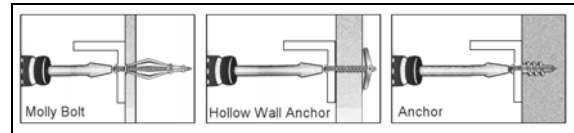

Figure 1   Special Fasteners

For other surfaces, use special fasteners designed for your mounting surface (not included). See Figure 1 for examples. When selecting your fastener, make sure it is designed to support the weight of the product being installed. Follow the fastener manufacturer's instructions carefully.

Components and Hardware

Important: When you remove the shade from its packaging, leave it rolled up, as in Figure 2. Do not remove the straps until the shade is installed in the brackets.
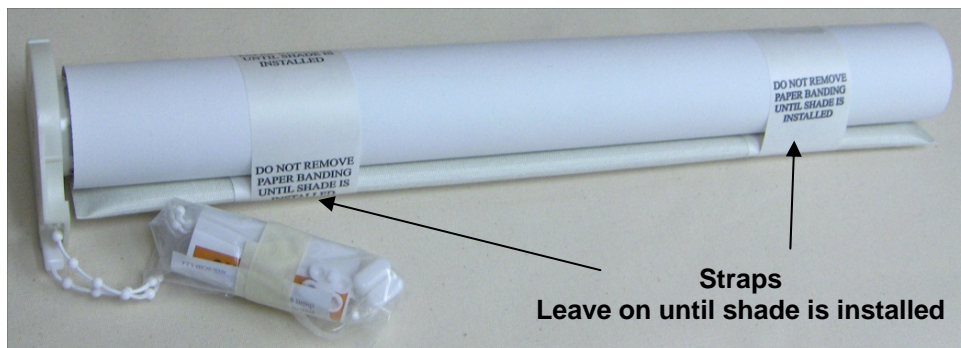

Straps
Leave on until shade is installed

Figure 2   Rollstar Shade with Chain and Clutch Lifting System

Components

- Shade
- Fascia with shade brackets installed
- 1½″ self-tapping hex head mounting screws
- Cotter pin
- Fascia brackets (for outside mount)
- Phillips screw for chain holder (chain and clutch lifting system only)
- Bead stops (chain and clutch lifting system only)

Fascia Bracket for Outside Mount	Cotter Pin for Motor or Heavy-Duty Clutch	Mounting Screw *1½″ Self-Tapping Hex Head*	Chain Holder Screw for Chain & Clutch *1¼″ Phillips*	Metal Bead Stop for Chain & Clutch	Plastic Bead Stops (Chain & Clutch)

Figure 3   Hardware

Installation Steps

All Lifting Systems

Step 1: Attach the Fascia

Inside Mount
- Make sure the factory-installed shade brackets are secure in the fascia. Tighten the setscrews if needed.
- Hold the fascia in the opening at the desired location, making sure it is centered and level. If the window opening is not level, use shims to level the fascia.
- **Important:** For the shade to operate properly and roll up evenly, it must be level.
- Attach the fascia by drilling the self-tapping hex head screws through the top of the fascia and into the window frame. Place a screw within about 6″ of each end, and space any additional screws about 30″–36″ apart.

Outside Mount
- Hold the fascia on the wall and mark the location, making sure it is centered and level.
- Measure and mark the locations for the fascia brackets (1/16″ below the desired level of the top of the fascia). Place a bracket within about 6″ of each end, and space any additional brackets about 30″–36″ apart. Ensure the brackets are level with each other. Align brackets with studs where possible. If solid backing is not available, use special fasteners designed for the mounting surface (not included).

- Attach the brackets using the hex head screws provided. If there is any curvature in the wall surface, avoid warping the fascia by using shims behind brackets where needed to compensate.
- Loosen the lock screws on the brackets and move the slide cleats away from the wall.
- Tilt the fascia onto the brackets, catching the front mounting rail on the front of the brackets as shown.
- Tilt the fascia back so it is flat on the top of the brackets.
- Move the slide cleats back so that they catch the rear mounting rail of the fascia, and tighten the lock screws.

Figure 4   Fascia on Bracket
(shade bracket removed for illustration)

Important: For the remaining steps, refer to the instructions below that apply to your lifting system.

Shades with Spring Roller Lifting Systems

Begin with Step 1 under *All Lifting Systems.*

Spring Roller Step 2: Attach the Shade

- Insert the pin end of the shade into the round hole in the pin end bracket.
- Leaving the straps on the shade, place the spring roller end in its bracket as follows:
    - Use needle nose pliers to turn the spring end pin about five turns in the opposite direction to the roll of the shade. This sets the spring tension.
    - Holding onto the end pin with the pliers, guide it into the spring end bracket. See Figure 5.
    - Rotate the bracket locking lever up to lock the pin in place. See Figure 6.

Figure 5   Placing Spring Pin in Spring Roller Bracket

Figure 6   Spring Pin Locked in Spring Roller Bracket

Spring Roller Step 3: Adjust the Shade

- Remove the packing straps and test that the shade operates properly by raising and lowering it a few times. See the *Troubleshooting* section if the shade telescopes to either side or does not raise and lower evenly.
- If the shade does not raise all the way to the top, adjust the tension of the spring roller using either of the following methods:
  - Lower the shade a few inches below its highest point. Take the shade out of the brackets, and manually roll up the remaining shade fabric. Replace the fully rolled shade in the brackets.
  - Remove the shade from the brackets and use pliers or an adjustable wrench to turn the rectangular spring end pin. Start by turning it a half turn counterclockwise to unlock it. Then turn it one or two rotations clockwise. Each full turn of the pin equals one full turn of the roller. Replace the shade in the brackets and test that it now rolls up completely. Repeat or adjust as necessary.
- If the shade pulls too tightly against the headrail when raised, adjust the tension of the spring roller using either of the following methods:
  - Remove the shade from the brackets and unroll a few inches of the shade. Replace the partially unrolled shade in the brackets and test that the tension is now correct. Repeat or adjust as needed.
  - Remove the shade from the brackets and use pliers or an adjustable wrench to turn the rectangular spring end pin. Start by turning it a half turn clockwise to unlock it. Then turn it one or two rotations counterclockwise. Each full turn of the pin equals one full turn of the roller. Replace the shade in the brackets and test the tension. Repeat or adjust as necessary.

Shades with Chain and Clutch Lifting Systems

Begin with Step 1 under *All Lifting Systems.* **Note:** For shades with C24 clutches and heavy duty clutch brackets, go to conditional step 2a below. For shades using spring assist systems, installation is as described in Step 2.

Chain and Clutch Step 2: Attach the Shade

- Remove the shade from its packaging, but leave it rolled up with the straps holding the roll.
- Lift the shade into the fascia, clutch end first, and push the clutch onto the bracket spear with the chain facing the floor. See Figure 7. **Note:** The spring tension for spring assist systems is set at Castec. You do not need to set the tension during installation of the shade.
- Lift the idler end up over the bracket notch, rotating as needed, and drop the idler end pin into the bracket. See Figure 8.
- Secure the idler end by rotating the locking lever to close the slot opening.
- Proceed to Step 3: Adjust the Shade.

Figure 7   Clutch End in Bracket   Figure 8   Idler End in Bracket

Conditional—Chain and Clutch Step 2a for C24 Clutches and Heavy Duty Clutch Brackets: Attach the Shade

- Lift the shade into the fascia, idler end first, and place the idler pin on the shade into the idler end bracket. See Figure 9.
- Gently push the shade toward the idler bracket until the idler pin on the shade collapses. See Figure 10.
- Attach the clutch end by pushing the clutch, chain down, onto the heavy duty bracket spear and releasing the tension on the idler pin. See Figure 11.

Figure 9   Idler Pin Going into Bracket

Figure 10 Idler Pin Collapsed in Bracket
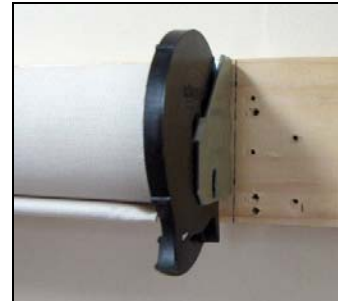
Figure 11 C24 Clutch on Heavy Duty Bracket

Chain and Clutch Step 3: Adjust the Shade

- Remove the packing straps and pull the back length of chain down to lower the shade.
- Raise the shade and check to make sure that it tracks properly and that the lower edge is level.
- If the shade telescopes to either side or does not raise and lower evenly, refer to the Troubleshooting section.

Warning: Do not lower the shade more than one inch below the ordered length. For the shade to stay securely fastened, several inches of shade cloth must stay wrapped around the tube.

Chain and Clutch Step 4: Set the Lower Bead Stop

Note: A chain and clutch lifting system has two bead stops to limit how far the shade can be raised or lowered. The bead stop for the upper limit, which also connects the chain, is put in position at the factory; the lower stop is placed when the shade is installed, to allow it to be adjusted precisely for the window.

- Pull the back length of the chain down until the shade is at its lowest position in the window.
- Grasp the bead that is at the top front of the clutch (Figure 12), pull it down, and attach the bead stop at that bead. On a plastic chain, simply snap the bead stop onto the chain (Figure 13). For a metal chain, crimp the stop onto the chain with grooved pliers (Figure 14).

Figure 12 Clutch End	Figure 13 Plastic Bead Stop	Figure 14 Crimp Metal Stop

Chain and Clutch Step 5: Attach the Chain Holder

Important: Hanging cords are a safety hazard for small children and pets. The chain holder is a necessary safety feature to prevent strangulation. Do not omit this step.

- Hold the chain holder upright and position it against the wall or window frame so that the chain is straight but not stretched (Figure 15). There should be enough slack so that the bead stops can rotate around the chain holder easily.
- Mark the location of the installation hole on the wall, and drill a 1/16″ pilot hole.
- Attach the chain holder to the wall or window frame using the Phillips screw provided. If you do not reach solid backing, use a secure fastener (not included).

Figure 15 Chain Holder

Chain & Clutch Step 6: Install the Shelf Below the Fascia (if included)

- Align the shelf with the lower edge of the fascia so it is flush with the end of the fascia at the idler end.
- Place the lower front edge of the shelf into the lip of the fascia (Figure 16). Rotate the shelf up and snap the lip of the shelf over the shelf hook on the fascia (Figure 17).
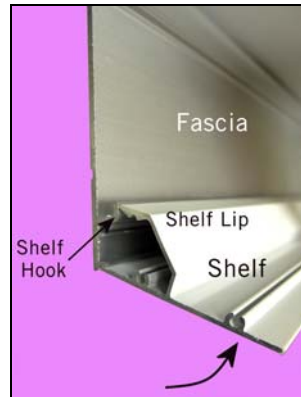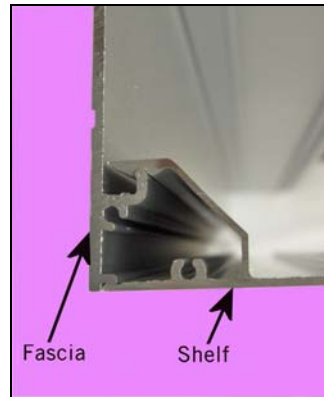

Figure 16 Shelf onto Fascia   Figure 17 Shelf on Fascia

(shade and brackets removed for illustration)

Shades with Motorized Lifting Systems

Perform Step 1 under *All Lifting Systems* before performing the steps below. In Step 2, be sure to follow the steps for the type of motor you are installing.

Motorized Shade Components

- Shade
- For LT50 Series Star Head Motors:
  - Two universal motor brackets—designed to accommodate shade lifting system. These brackets are described in the following section.
  - Four hex head screws with washers
  - Motor retaining clip
- For LT50 Series Round Head Motors:
  - Two motor brackets—designed to accommodate shade lifting system
  - Four hex head screws with washers
  - Cotter pin (for motor)
- For LS40 Series Round Head Motors:
  - Two motor brackets—designed to accommodate shade lifting system
  - Four hex head screws
- For Battery Powered Motors:
  - Battery Attachment Hardware
  - Battery Packs
  - Battery Lead

Motorized Step 2: Attach the Shade

LT50 Star Head Motors Using Universal Motor Brackets

Important: In the referenced graphics for the following steps, all top treatments such as fascias and headboxes have been removed for clarity. The graphics show the shade in a wall mount configuration; the steps to follow for either type of mount (wall or ceiling) are those listed below.

- Lift the shade into the fascia, idler end first.
- Place the idler pin on the shade into the idler end bracket. See Figure 18.
- Gently push the shade toward the idler bracket until the idler pin on the shade collapses. See Figure 19.
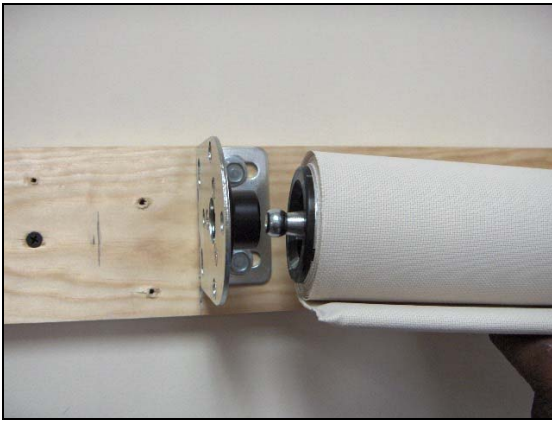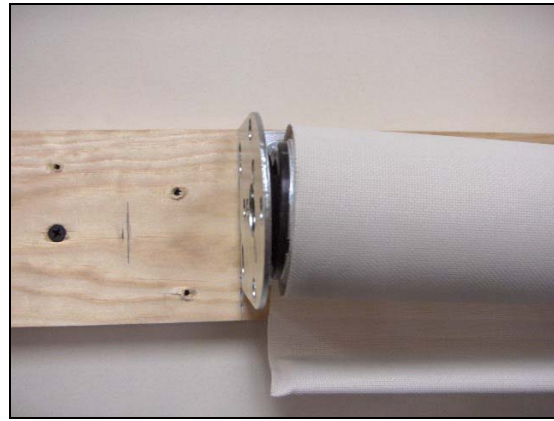

Figure 18 Motor Idler Going into Bracket

Figure 19 Motor Idler Collapsed in Bracket

- At the other end of the shade, align the limit switches on the motor to the desired position. These switches should point down or a little towards the room so that they are accessible.
- Bring the hardwired end of the motor to the pins on the motor bracket.
- Allow the shade to slide back so that the star head on the motor engages the pins on the motor bracket. See Figure 20.

When the pins on the motor bracket have engaged the motor, the motor will remain in the brackets without additional adjustment.

- **Important! Follow This Step!** The motor will remain in the brackets, but to ensure that it does not slip out of the installation, attach the motor retaining clip into the groove on the pins and motor. The clip should snap into position when it has been properly inserted into the groove on both pins. See Figure 21.

- **Tip:** It can be difficult to snap the motor retaining clip into the groove on the pins and motor once the motor is installed in the bracket. To avoid such difficulties, you can pre-load the motor retaining clip onto the motor before putting the motor into the brackets. To do this:
  1. Place the motor retaining clip onto the star head portion of the motor. The clip should be on the wider part of the head near the tube. Do not put the clip into the groove on the motor.
  2. Engage the star head motor with the pins on the motor bracket. The motor should engage the pins without the clip getting in the way.
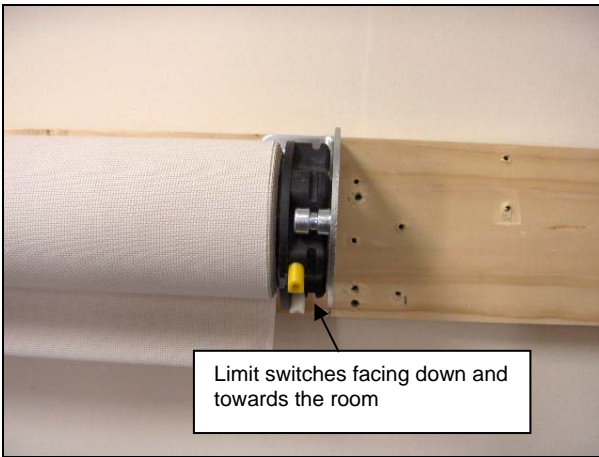 3. Slide the motor retaining clip into the groove on the motor and pins.
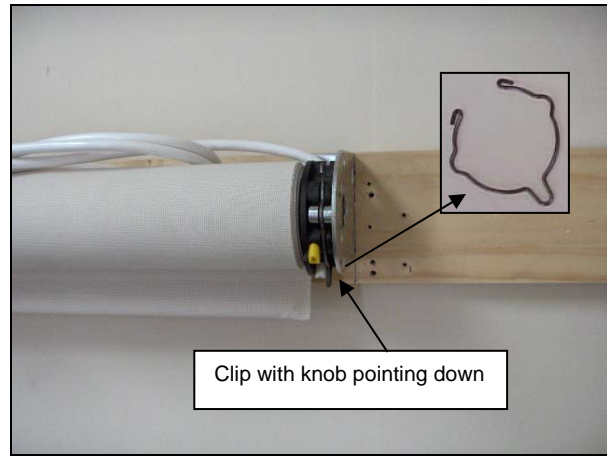
Figure 20 Motor in Bracket | Figure 21 Motor in Bracket with Motor Retaining Clip in Place (Detail of motor clip at top right in figure)

Note: The small knob on the bottom of the retaining clip should point straight down when installed. If it is necessary to remove the motor from the brackets—for example, to clean the shade or to move the installation from wall to ceiling (or vice versa)—simply place the tip of a screwdriver into this knob and gently pull the retaining clip away from the motor and the bracket pins.

- Finish the installation by cutting the packaging straps from the shade. Use caution to prevent the shade being damaged by this operation.
- Proceed to Step 3: Test the Shade and Set Limit Switches.

LT50 Round Head Motors Using Standard Heavy-Duty Brackets

- Lift the shade into the fascia, idler end first, and place the idler in the idler bracket (Figure 22 and Figure 23).
- Lift the motor end into its bracket, being sure that the holes align with the holes in the bracket and the limit switches are easily accessible (Figure 24).
- Use needle nose pliers to insert the cotter pin, and then bend the tabs of the pin so it cannot slip back through (Figure 25).
- Finish the installation by cutting the packaging straps from the shade. Use caution to prevent the shade being damaged by this operation.
- Proceed to Step 3: Test the Shade and Set Limit Switches.

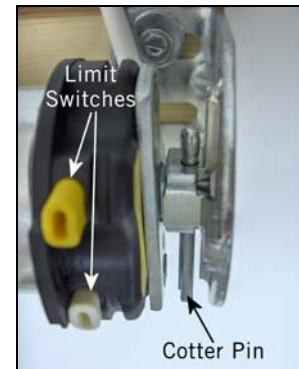Figure 22 Motor Idler Going into Bracket | Figure 23 Motor Idler in Bracket | Figure 24 Motor in Bracket | Figure 25 Motor in Bracket with Cotter Pin

(fascia removed for illustration)

LS40 Round Head Motors Using Standard RollEase Brackets

Installing an LS40 motor is very similar to installing a shade with a C8 clutch and chain. In fact, the same clutch and idler brackets are used for the LS40 as for a shade using a C8 clutch lifting system. This is because the LS40 motor and the C8 clutch both fit into 1 1/2″ tubes.

- Remove the shade from its packaging, but leave it rolled up with the straps holding the roll.
- Lift the shade into the fascia, motor end first, and attach the motor end by pushing the motor onto the bracket spear.
- Lift the idler end up over the bracket notch, rotating as needed, and drop the idler end pin into the bracket.
- Secure the idler end by rotating the locking lever to close the slot opening.
- Proceed to Step 3: Test the Shade and Set Limit Switches.

Motorized Step 3: Test the Shade and Set Limit Switches

- If a motor tester is available, connect the motor tester by clamping each lead onto the motor wire of the same color, and then test the motor to verify correct operation. Raise and lower the shade and check to make sure that it tracks properly and the lower edge is level. If the shade telescopes to either side or does not raise and lower evenly, refer to the Troubleshooting section.
- If the motor limit switches need adjustment, do so now (instructions included separately).

Motorized Step 4: Install the Shelf Below the Fascia (if included)

- Align the shelf with the lower edge of the fascia so it is flush with the end of the fascia at the idler end.
- Place the lower front edge of the shelf into the lip of the fascia (Figure 26). Holding the front of the fascia in place, rotate the shelf up, and snap the lip of the shelf over the shelf hook on the fascia (Figure 27).
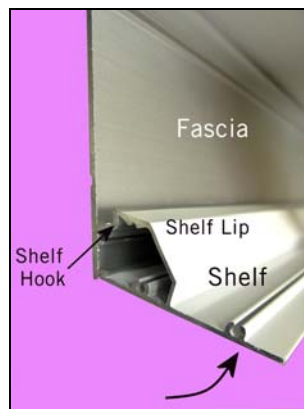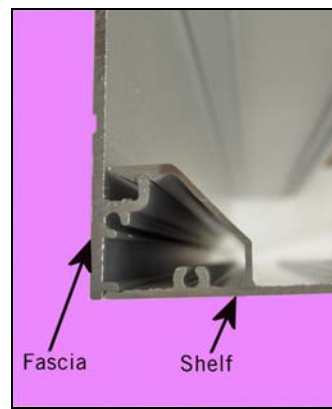

Figure 26 Shelf Going onto Fascia   Figure 27 Shelf on Fascia

(shade and brackets removed for illustration)

Shades with Battery Motor Lifting Systems

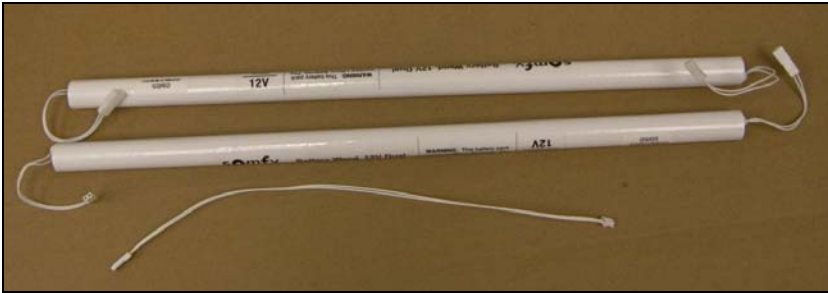Perform Steps 1 and 2 under *All Lifting Systems* before performing the steps below.

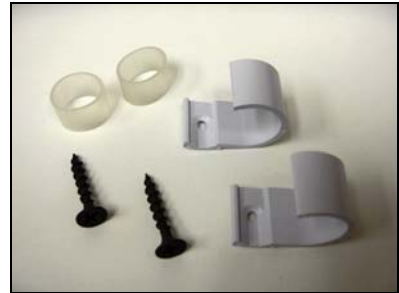Figure 28 Battery Packs and Motor Lead

Figure 29 Battery Attachment Hardware

Battery Motor Step 3: Attach the Battery Pack

- Find a location for the battery packs (shown in Figure 28) that will be least visible but will allow you to plug the batteries into the motor using the 12″ lead provided. (Battery packs last about five years, but you should also consider accessibility for changing battery packs.) A 9-volt motor uses one battery pack; a 12-volt motor uses two packs attached together. Two battery packs can be placed side by side or end to end, whichever way they fit best.
- Mark the locations to attach the battery pack brackets (Figure 29) placing the open end of the U facing up or out. Attach the brackets using the screws provided. If you are attaching to a metal surface such as inside a fascia or headbox, you will need to purchase self-tapping screws.
- If you are installing two battery packs, connect them, male to female (Figure 30 and Figure 31).

Figure 30 Battery Pack Connectors

Figure 31 Battery Packs Connected

- If you are attaching the battery packs in a vertical orientation, you can use the flexible bands included in the hardware packet to make a tighter fit in the bracket if needed. Push the bands over the battery pack before placing the pack in the brackets.
- Snap the battery packs into the brackets with the female lead toward the motor (Figure 32).

Figure 32 Battery Pack Attached To Brackets

Battery Motor Step 4: Place the Shade in the Shade Brackets

- Remove the shade from its packaging but leave it rolled up with the straps securing the roll.

Figure 33 Motor Lead in Motor

Figure 34 Motor in Bracket

Figure 35 Idler End in Bracket

- Plug the motor lead into the back of the motor (Figure 33).
- Lift the shade into the fascia, motor end first, and push it onto the bracket spear (Figure 34).
- Lift the idler end up over the idler bracket notch, rotating as needed, and drop the idler end pin into the bracket.
- Secure the idler end by rotating the locking lever to close the slot opening (Figure 35).

- Connect the motor lead to the battery pack (see Figure 36).

Figure 36 Motor Connected to Battery Pack (back view)

- Remove the straps from the shade and test the shade operation. If the limits are not set correctly, adjust the limits per the motor instructions included separately.

Battery Motor Step 5: Install the Shelf Below the Fascia (if included)

- Align the shelf with the lower edge of the fascia so it is flush with the end of the fascia at the idler end.
- Place the lower front edge of the shelf into the lip of the fascia (see Figure 26 on page 10). Holding the front of the fascia in place, rotate the shelf up, and snap the lip of the shelf over the shelf hook on the fascia (see Figure 27 on page 10).

Caring for Your Rollstar Shade

Your *Rollstar™* shade will provide you with years of beauty and pleasure with minimal care and cleaning. To care for your shade:

- Vacuum using a brush or dust head attachment.
- Dust lightly using a soft, clean cloth.
- Never immerse your shade in water or liquids of any kind.
- If necessary, wipe the solar fabric with a damp cloth. Allow the shade to dry completely before raising.
- On some fabrics, a mild detergent solution can be used if needed. Test on a small inconspicuous area first. Be sure to rinse thoroughly and allow the shade to dry fully before raising.

Troubleshooting

Important: When troubleshooting, you might need to pull the shade down to expose part of the tube. However, only expose enough tube to be able to shim the shade, as explained below. If you allow the shade to unroll so much that the entire roll of fabric is falling from the back, the fabric might come off the tube.

Problem:

The shade telescopes to one side or the other, or rolls up unevenly.

Solution:

The brackets may be installed unevenly. If the shade telescopes to the left, the right bracket is higher than the left bracket. If the shade telescopes to the right, the left bracket is higher than the right bracket. Use a level to check the bracket positions and re-install one bracket, using a shim if necessary.
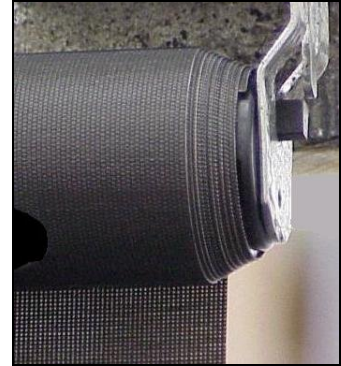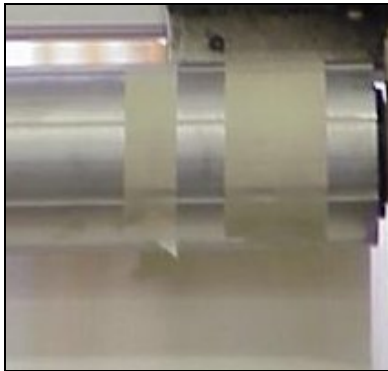
Figure 37 Telescoping to the Left

Figure 38 Masking Tape Shims

Problem:

The shade telescopes to one side or the other, but the brackets are perfectly level.

Solution:

Lower the shade until a small part of the tube is exposed. Adjust the shade for telescoping by shimming with masking tape. Use a piece of masking tape on the side opposite the telescoping end; for example, if the shade telescopes to the left (see Figure 37), then place the masking tape on the right side of the shade (see Figure 38). Raise and lower the shade to test for proper tracking. If the shade still does not track properly, repeat the above procedure. The correct amount of tape needed is determined by trial and error.

Problem:

The shade rolls up unevenly, but the brackets are perfectly level.

Solution:

Lower the shade until a small part of the tube is exposed. Place one or two long strips of masking tape horizontally along the tube (about half the length) on the side that hangs too low. Raise and lower the shade to see if it now rolls evenly. If the shade still does not roll evenly, repeat the above procedure. The correct amount of tape needed is determined by trial and error.