

Rollstar Shade with 5050 Headbox 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.
- Stud finder
- Needle nose pliers
- Power drill with the following bits:
 - 1/16" wood drill bit
 - 1/8" metal drill bit
 - Masonry drill bit (if mounting surface requires)
 - Standard and Phillips screwdrivers

Important Information on Fasteners

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

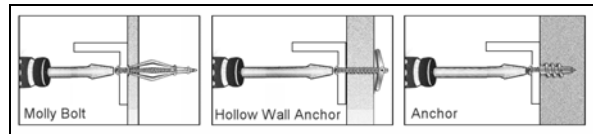


Figure 1 Special Fasteners

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.

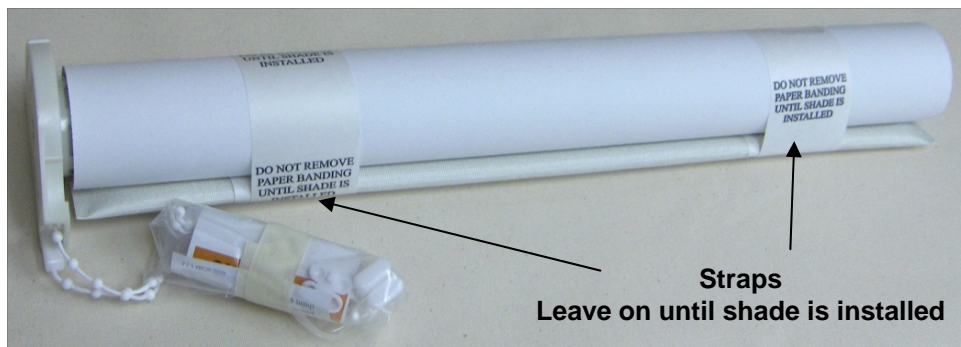


Figure 2 Rollstar Shade (Chain & Clutch Lifting System)

Components

- Shade
- Headbox with shade brackets installed
- Mounting screws
- Headbox brackets (for outside/wall mount)
- Nuts and bolts (for outside/wall mount)
- Cotter pin (for motorized shade or heavy-duty clutch)
- Bead stop (for chain & clutch lifting systems)
- Chain holder screw (for chain & clutch lifting systems)
- Shelf (optional)



Figure 3 Hardware

Installation Steps

All Lifting Systems

Step 1: Determine the Headbox and Bracket Locations

Inside Mount

- Center the headbox at the desired location in the opening. On the top inside of the headbox, mark the locations for the mounting holes. Place a hole within about 6" of each end and space any additional holes about 30"–36" apart. Be sure the holes will align with solid backing and will not interfere with any other hardware in the window frame.
Note: If you ordered the shade with a reverse roll (the fabric falls off the front of the tube) you can reverse the headbox, placing the shelf hook in the back so a removable shelf can be installed.
- Predrill 1/8" holes in the headbox at the marked locations.
- If the shade is motorized, determine where the power cord should exit the headbox, and drill a 1/2" hole in the top or back of the headbox. (The most common position is in the top of the headbox, toward the back, above the motor.)

Outside Mount

- Hold the headbox on the wall in the desired location, and mark its position, making sure it is centered and level.
- If the shade is motorized, determine where the power cord should exit the headbox, and drill a 1/2" hole in the top or back of the headbox. (The most common position is in the top of the headbox, toward the back, above the motor.)
- Determine the locations for the brackets, placing the bottom of the bracket at the desired level for the top of the headbox. Place a bracket within about 6" of each end, and space any additional brackets about 30"–36" apart. Align with studs where possible. If solid backing is not available, use special fasteners designed for the mounting surface (not included).
- Using one of the brackets as a guide, hold it in each bracket location and mark the positions of the mounting holes.
- Drill holes at the marked locations (1/16" pilot holes for wood surfaces or 1/8" holes for metal surfaces) and attach the brackets to the wall using the 2 1/2" Phillips screws provided.

Step 2: Attach the Headbox

Inside Mount

- Make sure the factory-installed shade brackets are secure inside the headbox.
- Center the headbox in the opening, and use an awl to mark the positions of the mounting holes. Check to ensure the top of the opening is level. If the window opening is not level, use shims to level the headbox. **Important:** To operate properly and roll up evenly, the shade must be level.
- Attach the headbox using the mounting screws provided. There will be a slight gap because of the bracket screws that protrude slightly from the top of the headbox.

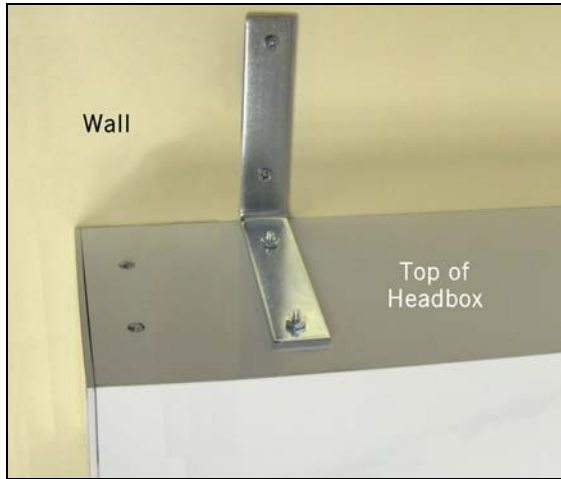


Figure 4 Headbox attached to Bracket

Outside Mount

- Make sure the factory-installed shade brackets are secure in the headbox.
- Hold the headbox in place below the brackets, and mark the positions of the bracket holes on the top of the headbox.
- Drill $\frac{1}{8}$ " holes in the top of the headbox at the marked locations.
- Attach the headbox to the brackets using the nut and bolt hardware provided.

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

Shades with Spring Roller Lifting Systems

Begin with Steps 1 and 2 under *All Lifting Systems*.

Spring Roller Step 3: 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.

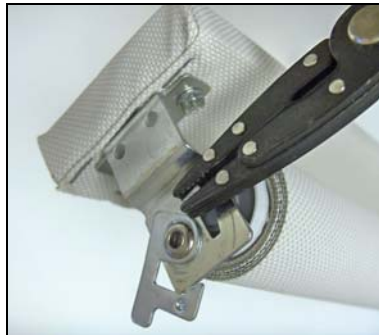


Figure 5 Placing Spring Pin in Spring Roller Bracket



Figure 6 Spring Pin Locked in Spring Roller Bracket

Spring Roller Step 4: 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 and 2 under *All Lifting Systems*. **Note:** For shades with C24 clutches and heavy duty clutch brackets, go to conditional step 3a below. For shades using spring assist systems, installation is as described in Step 3.

Chain & Clutch Step 3: Install the Shade into the Headbox

- Remove the shade from its packaging, but leave it rolled up with the straps holding the roll.
- Lift the shade into the headbox, 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.



Figure 7 Clutch End in Bracket
(headbox removed for illustration)

- Lift the idler end up over the bracket notch, rotating as needed, and drop the idler end pin into the bracket (Figure 8).
- Secure the idler end using the method applicable to your system:
 - Rotate the locking lever to close the slot opening.
 - For heavy-duty clutches, align the hole in the idler end pin with the hole in the bracket. Use needle nose pliers to insert the cotter pin, and then bend the tabs of the pin so it cannot slip back through.
- Proceed with Step 4: Adjust the Shade.



Figure 8 Idler End in Bracket
(headbox removed for illustration)

Conditional—Chain and Clutch Step 3a for C24 Clutches and Heavy Duty Clutch Brackets: Attach the Shade

- Lift the shade into the headbox, 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.

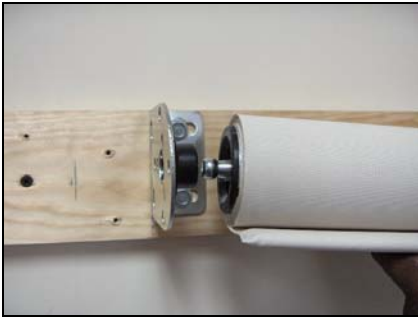


Figure 9 Idler Pin Going into Bracket

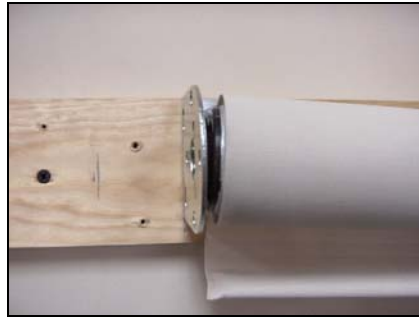


Figure 10 Idler Pin Collapsed in Bracket

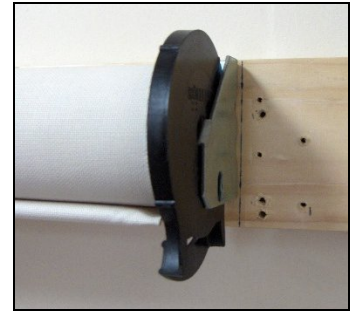


Figure 11 C24 Clutch on Heavy Duty Bracket

Chain & Clutch Step 4: 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 see 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, see the *Troubleshooting* section on the last page.

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 & Clutch Step 5: Set the Lower Bead Stop

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, allowing it to be adjusted precisely for the window.



Figure 12 Top Front Bead

- Pull the back length of the chain down until the shade is at its desired 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 13 Plastic Bead Stop



Figure 14 Crimping Metal Stop

Chain & Clutch Step 6: 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 (Figure 15) upright and position it against the wall or window frame so that the chain is straight but not stretched. 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 1 1/4" Phillips screw provided. If you do not reach solid backing, use a secure fastener (not included).



Figure 15 Chain Holder

Chain & Clutch Step 7: Install the Removable Shelf (if included)

- Place the lip of the shelf over the shelf hook on the inside front of the headbox, and push the shelf down until it rests against the bottom edge of the headbox. The lip of the shelf should fit snugly between the shelf hook and the rubber strips.

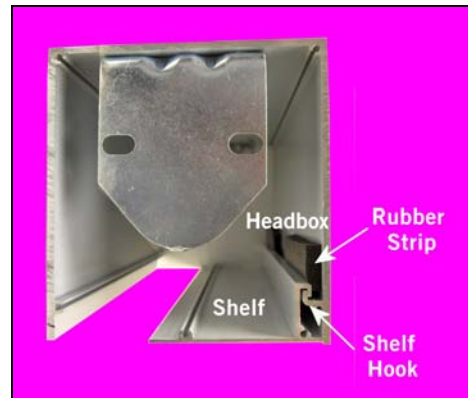


Figure 16 Shelf on Headbox
(end cap removed for illustration)

Shades with Motorized Lifting Systems

Perform Steps 1 and 2 under *All Lifting Systems* before performing the steps below. In Step 3, 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—configured 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

Step 3: Attach the Shade

LT50 Star Head Motors Using Universal Motor Brackets

Important: In the referenced graphics for the following steps, all top treatments 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 headbox, idler end first.
- Place the idler pin on the shade into the idler end bracket. See Figure 17.
- Gently push the shade toward the idler bracket until the idler pin on the shade collapses. See Figure 18.

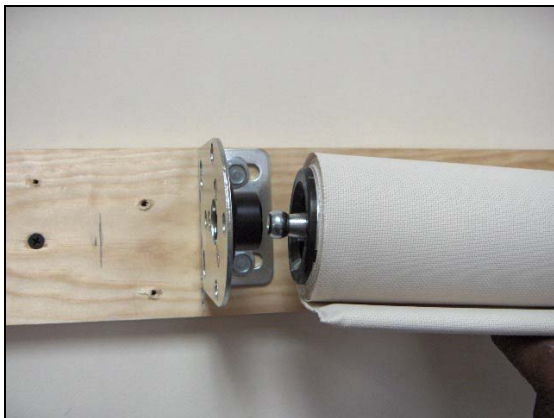


Figure 17 Motor Idler Going into Bracket

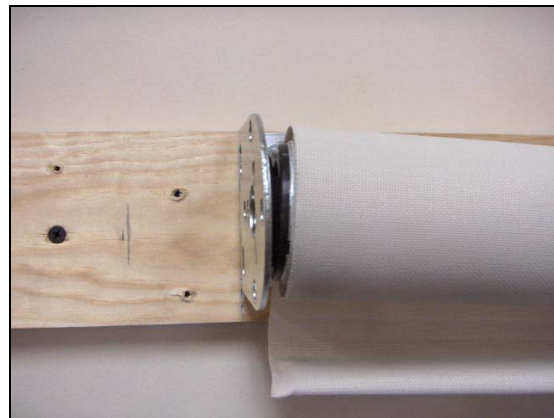


Figure 18 Motor Idler Collapsed in Bracket

- 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 19.
- 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 20.
- **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.

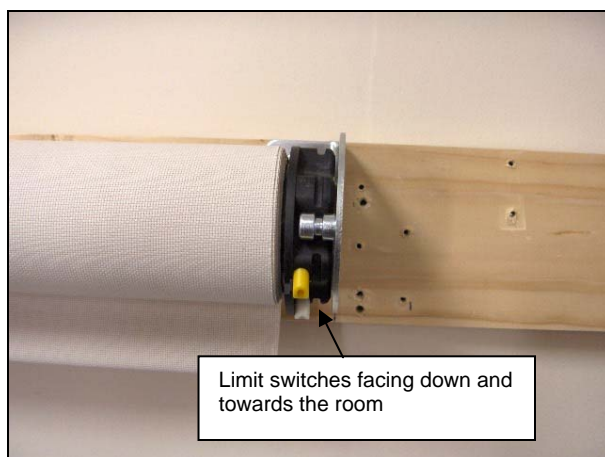


Figure 19 Motor in Bracket

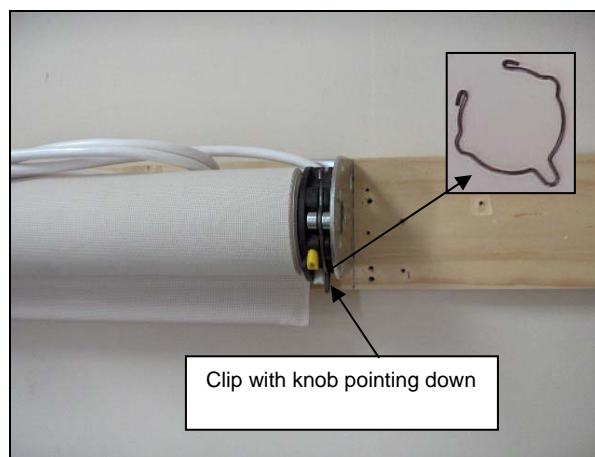


Figure 20 Motor in Bracket with Motor Retaining Clip in Place
(Detail of motor clip at top right in figure)

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 4: Test the Shade and Set Limit Switches.

LT50 Round Head Motors Using Standard Heavy-Duty Brackets

- Lift the shade into the headbox, idler end first, and place the idler in the idler bracket (Figures 21 and 22).
- 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 23).
- Use needle nose pliers to insert the cotter pin, and then bend the tabs of the pin so it cannot slip back through (Figure 24).
- 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 4: Test the Shade and Set Limit Switches.



Figure 21 Motor Idler Going into Bracket

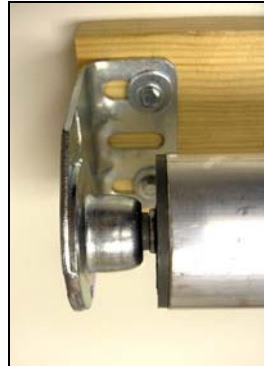


Figure 22 Motor Idler in Bracket



Figure 23 Motor in Bracket

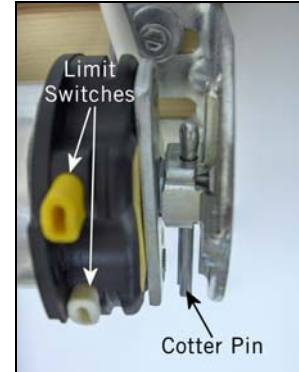


Figure 24 Motor in Bracket with Cotter Pin

(Headbox 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 1½" tubes.

- Remove the shade from its packaging, but leave it rolled up with the straps holding the roll.
- Lift the shade into the headbox, 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 4: Test the Shade and Set Limit Switches.

Step 4: 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 see that it tracks properly and the lower edge is level. If the shade telescopes to either side or does not raise and lower evenly, see the *Troubleshooting* section on the last page.
- If the motor limit switches need adjustment, do so now (instructions included separately).

Motorized Step 5: Secure the Shade in the Motor Bracket

- When the limits are correctly set, raise the shade to its upper limit, and disconnect the motor tester from the shade cord. (Be sure you have replaced the cover on the limit switches so they cannot be accidentally reset.)
- Remove the motor end of the shade from the motor bracket. Feed the motor cord through the power cord hole that you drilled in Step 1, and lift the motor end back into its bracket. Make sure that the limit switches are facing down.
- Secure the motor in its bracket as described above.

Motorized Step 6: Install the Removable Shelf (if included)

- Place the lip of the shelf over the shelf hook on the inside front of the headbox, and push the shelf down until it rests against the bottom edge of the headbox. The lip of the shelf should fit snugly between the shelf hook and the rubber strips.

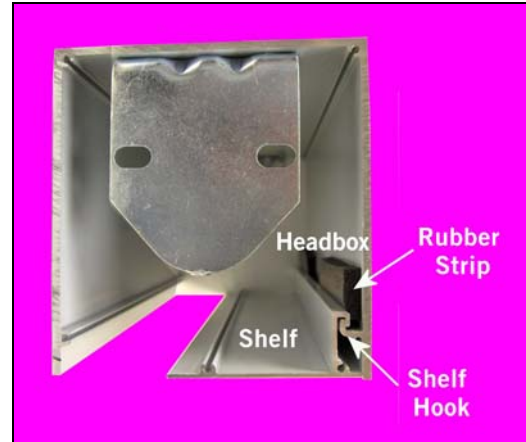


Figure 25 Shelf on Headbox
(end cap removed for illustration)

Important: When you have finished the installation, have the wiring completed by a qualified electrician.

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.

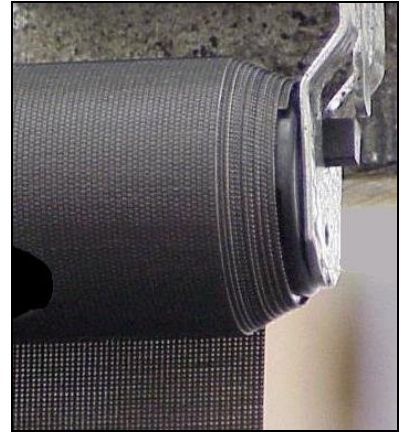


Figure 26 Telescoping Left

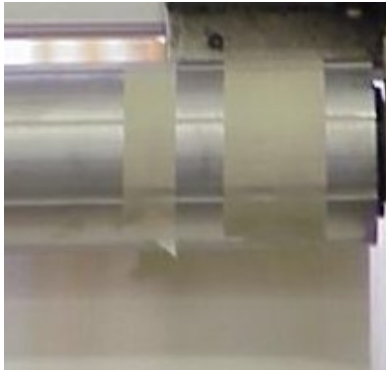


Figure 27 Masking Tape Shims

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 (Figure 26), place the masking tape on the right side of the shade (Figure 27). 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 along about half the length of the tube 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.