

the custom shade

BY INNOVATIVE OPENINGS

Motorized Patio Shade Installation Instructions



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Motorized Patio Shade Installation Instructions

1.0 Overview

The following installation instructions are for The Custom Shade's Motorized Patio Shades. This product is only offered in a 4" x 4 1/2" Head Box, it is not available in exposed. The fabric guide available for this product is Cable Guide only. 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 Needed



Screw Gun
w/ Bit Extender



Phillips Head
Screwdriver



Pliers



Sharp Cable Cutters
(Knipex 95 61 150 recommended)



Tape Measure



Level

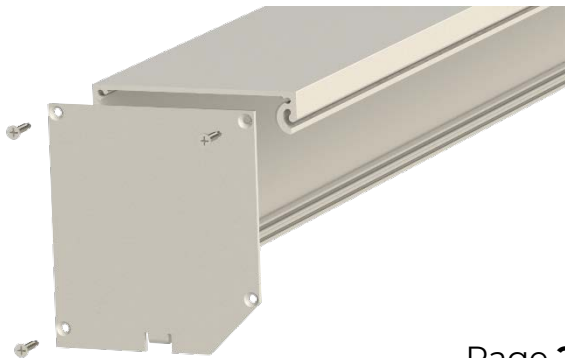


Appropriate
Fasteners
(not included)
& Corresponding Bit

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.

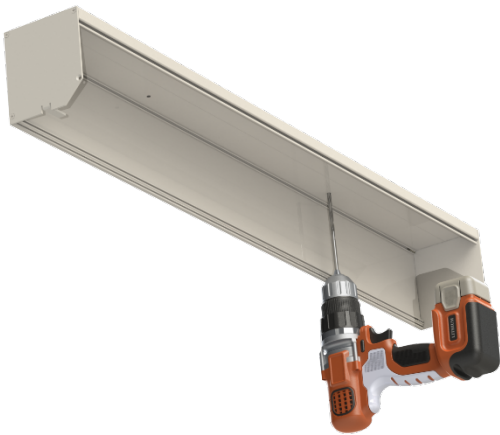


Motorized Patio Shade Installation Instructions

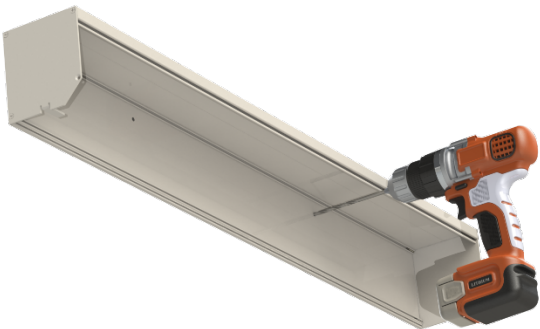
2.2 Pre-Drill Mounting Holes

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

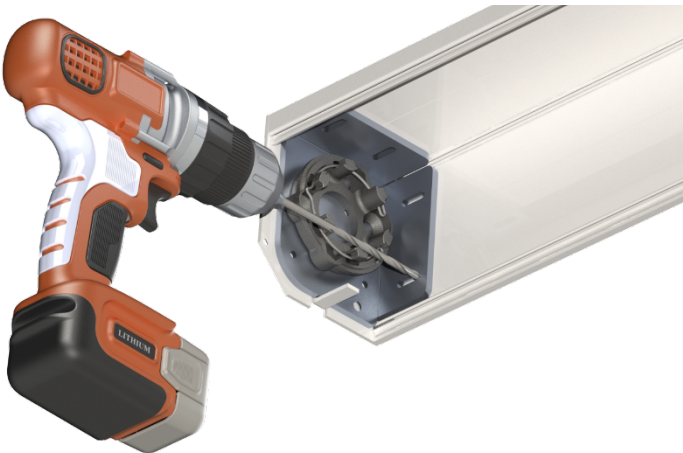


Mark the bracket mounting locations on the back cover. Place the operator and idler brackets in the channels of the back cover. Mounting locations for ceiling mount applications will be on the top of the back cover while for wall mount application they will be located on the back of the back cover. Pre-drill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

Ceiling Mount



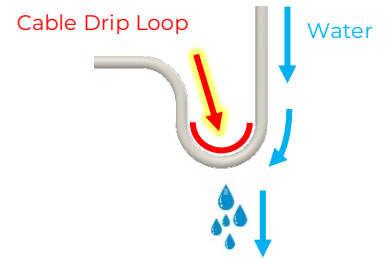
Wall Mount



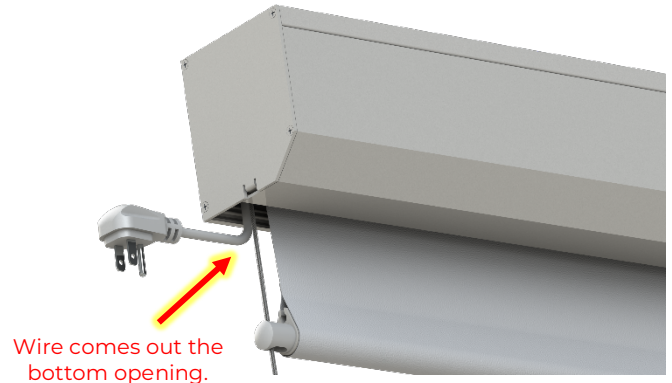
Motorized Patio Shade Installation Instructions

2.3 Motor Cable Routing Holes

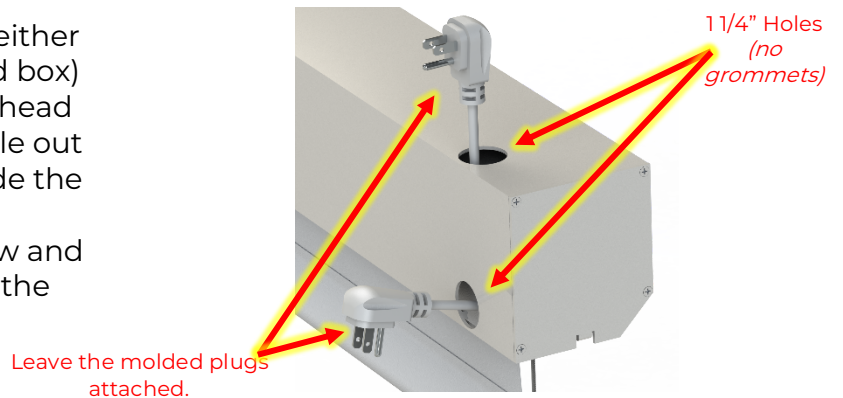
You have three location options for your motor cable, for all three options orient the power wire so it does not interfere with the shade operation. Ensure there is an adequate drip loop length so no condensation can travel to the motor head. The drip loop must be located inside the head box, just off the head of the motor.



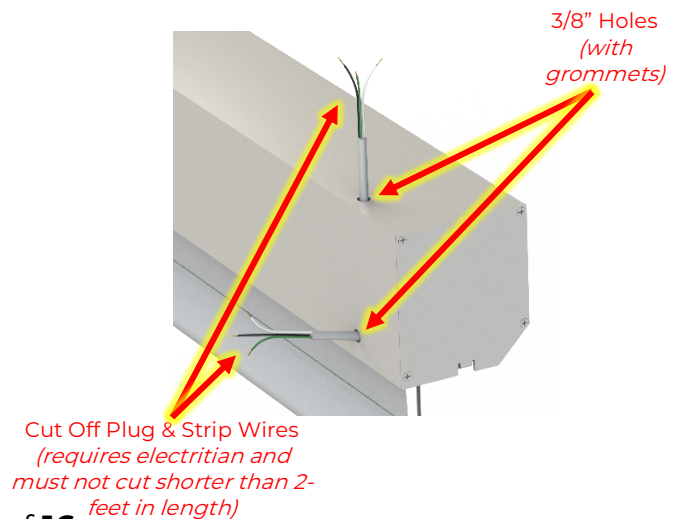
1. Let the motor wire exit through the bottom opening of the head box. This is the easiest option and does not require any drilling.



2. Drill a 1 1/4" hole in the head box (either on the top or the back of the head box) for the plug to route through the head box. This allows you route the cable out the head box in a way that will hide the cable better. Be aware that this requires a large drill bit or hole saw and will leave a large opening around the motor wire.



3. Cut off the molded plug (this will not void the warranty) and drill a 3/8" hole in the head box (either on the top or the back of the head box). Then feed the motor wire through the drilled hole (using the provided grommet) and either attach a new plug or hardwire to a junction box (requires an electrician). When cutting the molded plug, the power cable must not be cut shorter than 2-feet in length. The antennae is integrated into the power cable so if the cable is cut shorter than 2-feet, your shade may be inoperable.

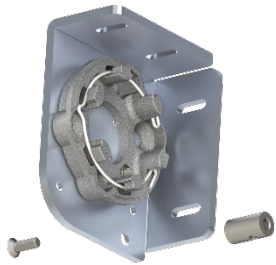


Motorized Patio Shade Installation Instructions

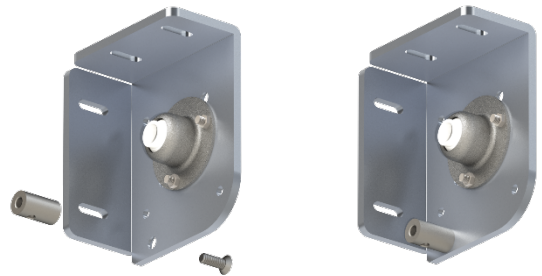
2.4 Upper Cable Retainer Install

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.

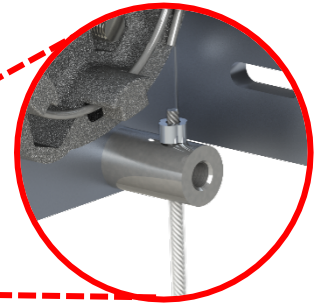
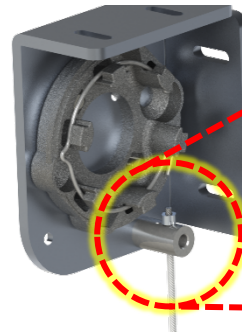
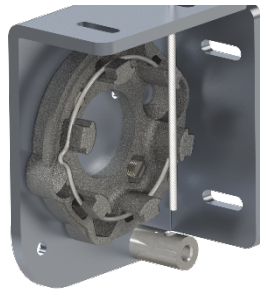
Somfy Motor



Spring Idler



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.

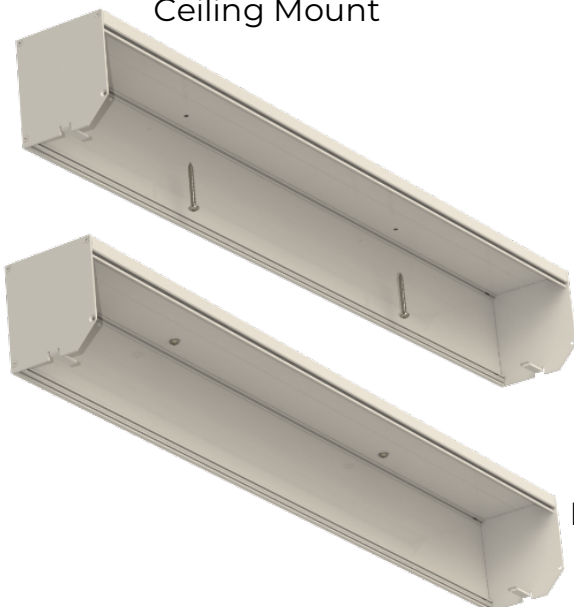


2.5 Head Box and Bracket Mounting

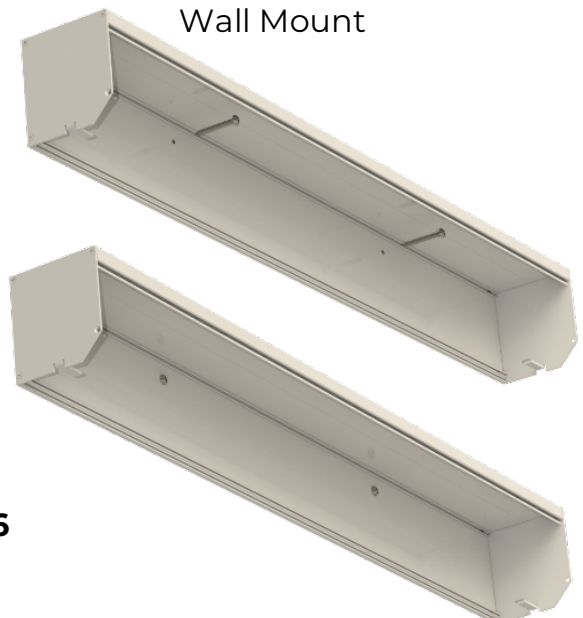
Mount the head box first using the pre-drilled holes in section 2.2 Pre-Drill Mounting Holes. Use a level to ensure the head box is mounted completely level.

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



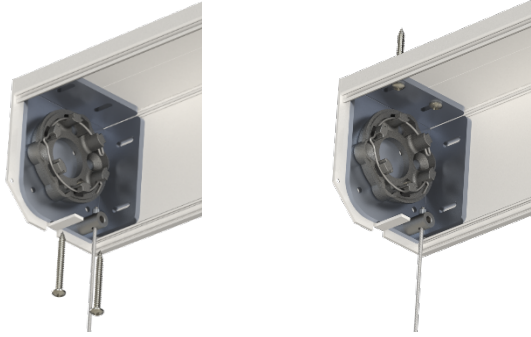
Wall Mount



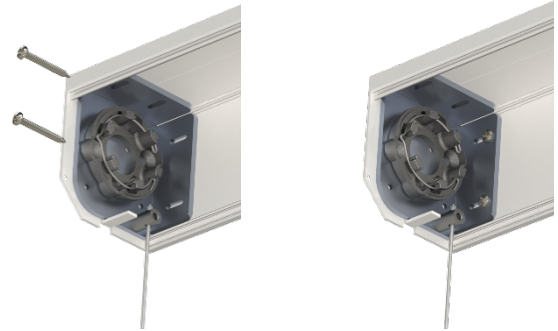
Motorized Patio Shade Installation Instructions

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

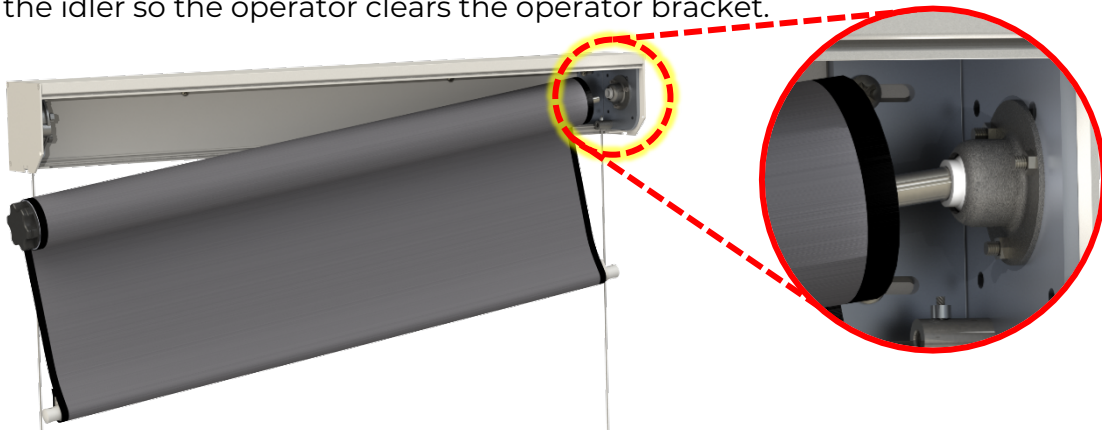


Wall Mount



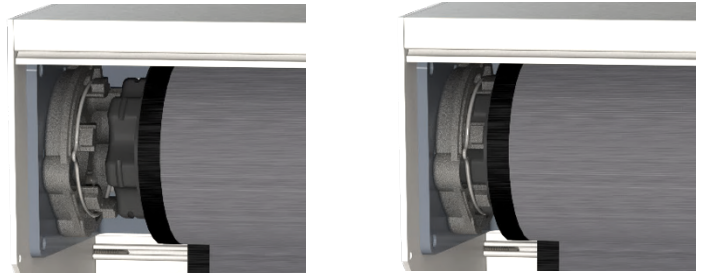
3.0 Shade Installation

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.



3.1 Motorized Shade

Leave the round motor retaining clip in place and align the motor head with the motor mount. Press the motor head firmly into place, you should hear the retaining ring snap into place and the motor should be fully seated.



3.11 Motor Cable Routing

Route the motor cable using the preferred option that was determined in section 2.3 Drill Motor Cable Routing Holes. Then run your wire to the power source.

3.2 Shade Removal

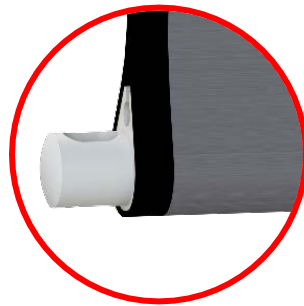
To remove the shade, reverse the previous installation instructions.

Begin by removing the retaining ring. 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.

4.0 Cable Guide Installation

4.1 Hem Bar Installation

Slide the hem bar through the hem bar pocket of the shade. Ensure it is centered in the hem bar pocket.



4.2 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.



The Custom Shade 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.



Deck Mount



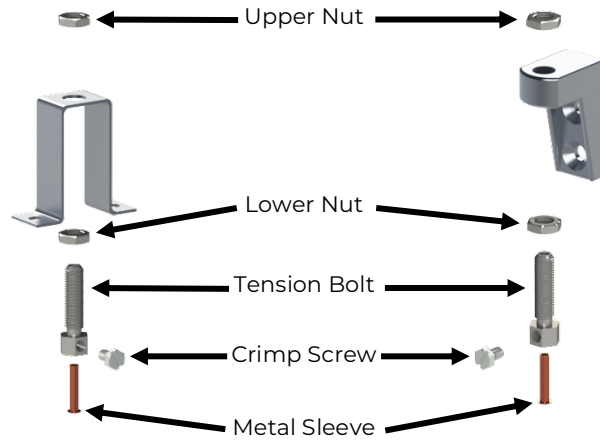
Wall Mount

Motorized Patio Shade Installation Instructions

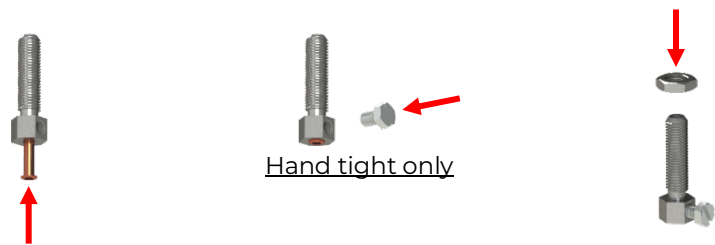
4.21 Tension Bolt Assembly

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

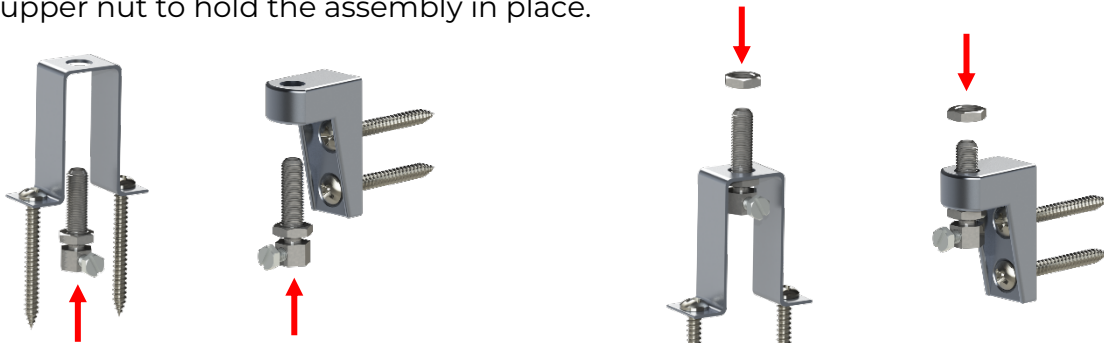
Remove the metal sleeve and place it through the hole on the head of the tension bolt and hand tighten the crimping screw to hold the metal sleeve in place. Do not overtighten the screw, it should only be tight enough to keep the metal sleeve from falling out of place.



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.

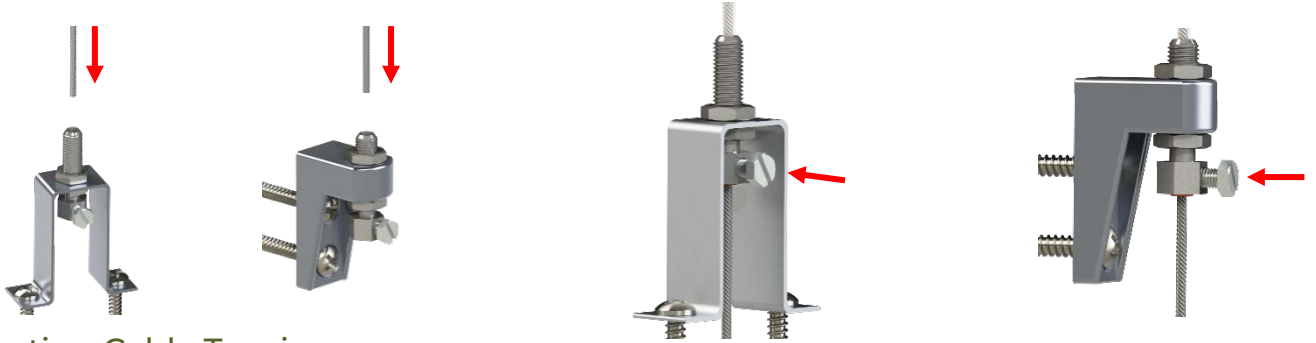


Remove the cable sheathing about 1/2" below the top threads of the tension bolt using a pair of 12-gauge wire strippers. Be careful when removing the sheathing. Avoid twisting the un-sheathed cable to prevent it from fraying.



Motorized Patio Shade Installation Instructions

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.



4.22 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. Cut the excess cable using sharp cable cutters, The Custom Shade recommends leaving at least 1-inch of cable to allow for future tension adjustments.



5.0 Shade Operation

Ensure your shade is set to the correct pre-set limits. If the limits need to be adjusted, please refer to the section 6.0 Motor Programming. The Custom Shade strongly advises against using any sensors (wind, sun, etc.) or programming any scheduled or timed events.

Motorized Patio Shade Installation Instructions

6.0 Motor Programming 6.1 Remote Options

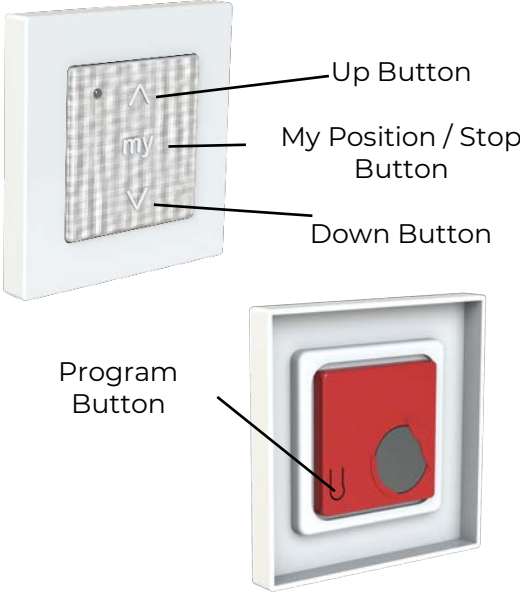
Hand Held Remotes

Available in 1 channel & 5 channel options



Smooove Surface Mount Wall Switch

Available in 1 Channel & 4 Channel options



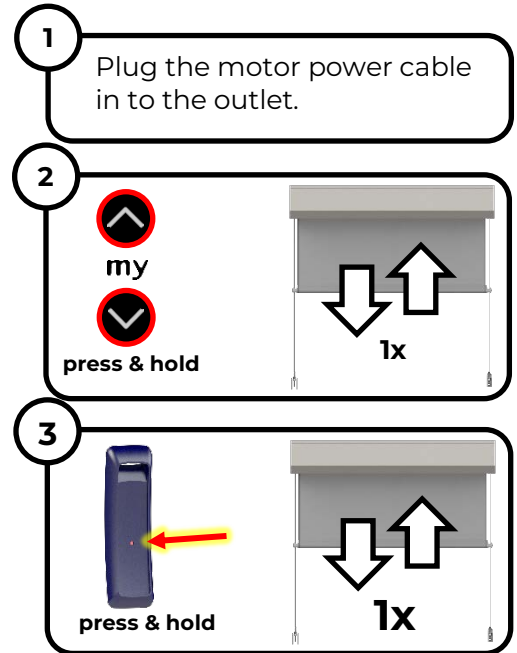
Motorized Patio Shade Installation Instructions

6.2 Wake Up Motor

Plug the motor power wire into the power outlet. The shade should jog up and down one (1) time (shade moves briefly up then down).

Then press the **UP** and **DOWN** buttons simultaneously on the remote/switch until the shade jogs up and down one (1) time.

Locate the programming button. The programming button is on the back of the remote/switch. With a small paper clip (or similar shaped object), press the **PROGRAM** button until motor jogs up and down.



6.3 Setting Motor Limits

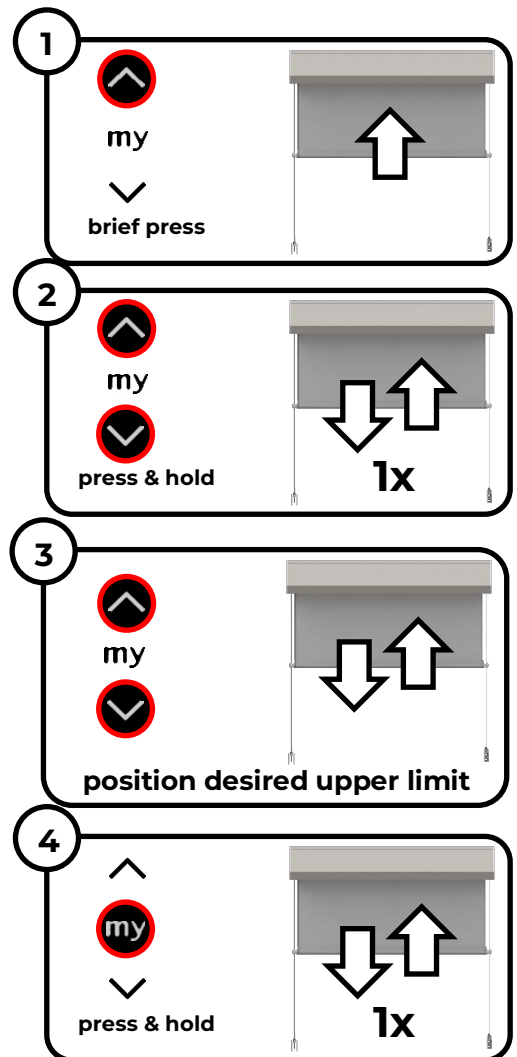
6.31 Adjusting Upper Limit

Briefly press the **UP** button on the transmitter, the shade will move to the previously set upper limit. (note: if the shade operates in the opposite direction, proceed to section 6.5 to factory reset the motor.)

When the shade stops at the upper limit, press and hold the **UP** and **DOWN** buttons on the transmitter simultaneously until the shade jogs up and down one (1) time.

Use the **UP** and **DOWN** buttons on the transmitter to move the shade to the desired new upper limit position.

When the shade is at the desired upper limit position, press and hold the **MY** button on the transmitter until the shade briefly moves up and down one (1) time.



Motorized Patio Shade Installation Instructions

6.32 Adjusting Lower Limit

Briefly press the **DOWN** button on the transmitter, the shade will move to the previously set lower limit.

When the shade stops at the lower limit, press and hold the **UP and DOWN** buttons on the transmitter simultaneously until the shade jogs up and down one (1) time.

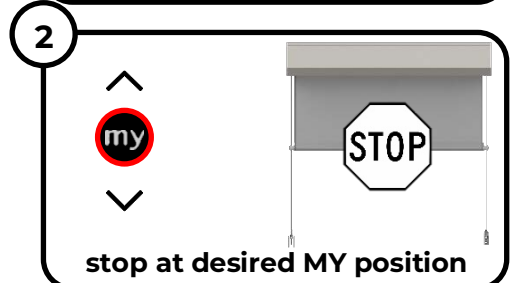
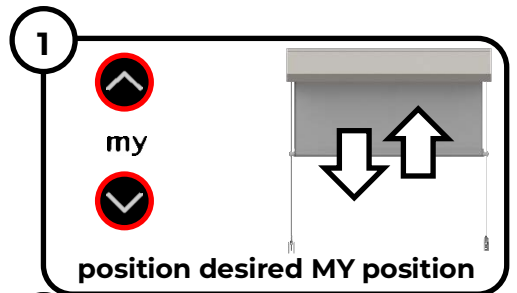
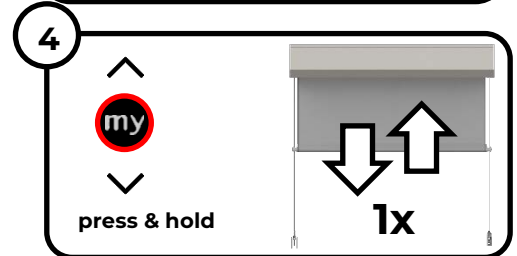
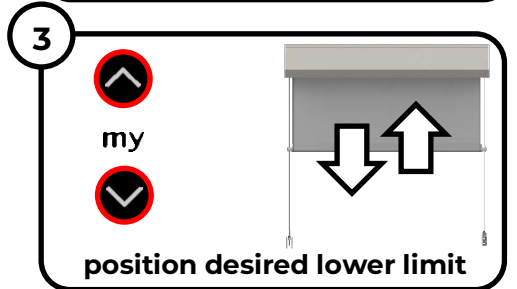
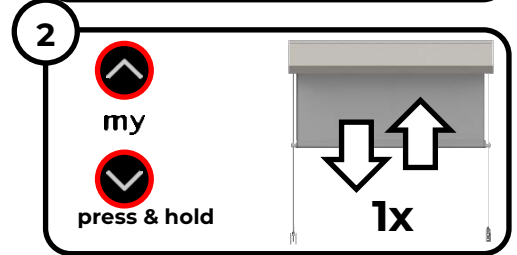
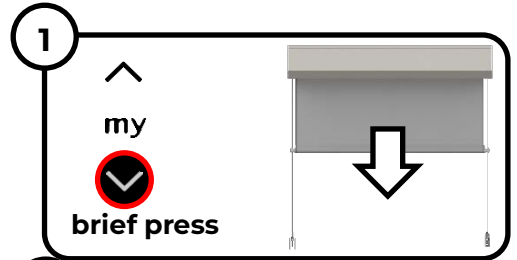
Use the **UP** and **DOWN** buttons on the transmitter to move the shade to the desired new lower limit position.

When the shade is at the desired lower limit position, press and hold the **MY** button on the transmitter until the shade briefly moves up and down one (1) time.

6.4 Setting (MY) Position

Use the **UP** and **DOWN** buttons on the transmitter to move the shade to the desired favorite position.

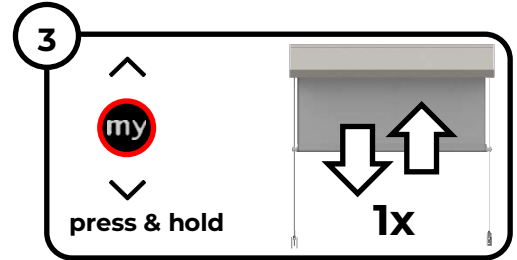
Briefly press the **MY** button on the transmitter to stop the shade at the desired position.





Motorized Patio Shade Installation Instructions

When the shade is stopped, press and hold the **MY** button on the transmitter until the shade jogs up and down one (1) time to confirm the new favorite (MY) position.



To modify the favorite (MY) position, repeat the process. The newly set favorite (MY) position will replace the old one.

Delete the favorite (MY) position: When the shade is stopped, briefly press the **MY** button on the transmitter to move the shade to the current favorite (MY) position. Allow the shade to move all the way to the favorite (MY) position, then press and hold the **MY** button on the transmitter. The shade will jog up and down one (1) time to confirm the deletion.

6.5 Motor Factory Reset

Factory reset will completely reset your motor and you will have to fully program it.

6.51 Motor Memory Clear

Remove the motor power plug from the power outlet for four (4) seconds.

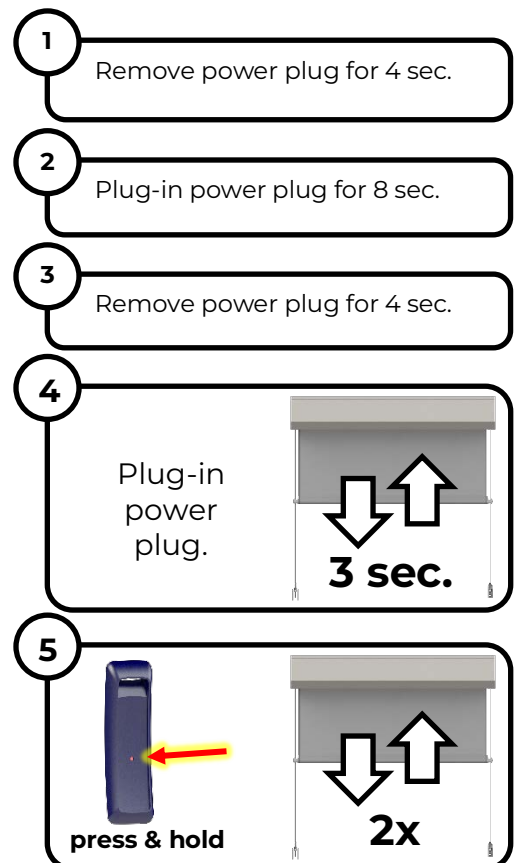
Plug-in the power plug into the power outlet for eight (8) seconds.

Remove the motor power plug from the power outlet for four (4) seconds.

Plug-in the power plug into the power outlet. The motor will run for approximately three (3) seconds then stop.

Select the programmed transmitter.

Press and hold the **PROGRAM** button (more than five (5) seconds) until the motor jogs two (2) different times. After two (2) motor jogs, the motor settings are cleared. If the motor does not jog twice, repeat these instructions.



Motorized Patio Shade Installation Instructions

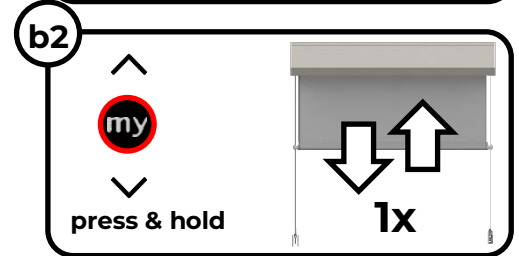
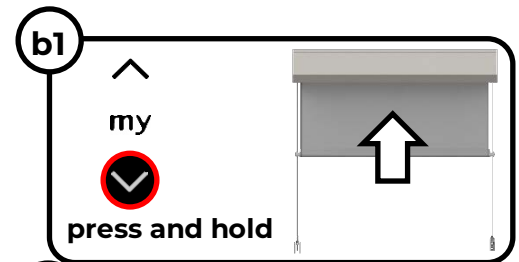
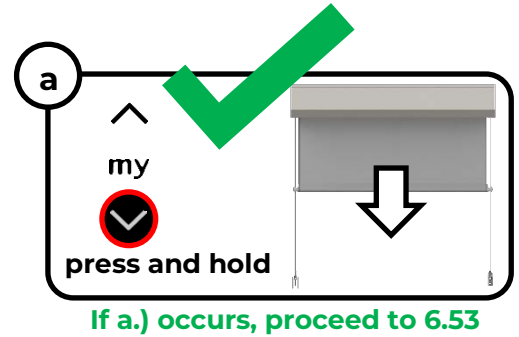
6.52 Check Motor Rotation

Press and hold the **DOWN** button for two seconds to check the direction of the motor.

a.) If the shade moves in the downward direction, then the motor rotation is correct, and you can move on to section 6.53.

b.) If the shade moves in the upward direction, press and hold the **MY** button until the shade jogs up and down one (1) time.

Press and hold the **DOWN** button for two seconds to check the direction of the motor, the shade should now move in the downward direction. If not, repeat the process.

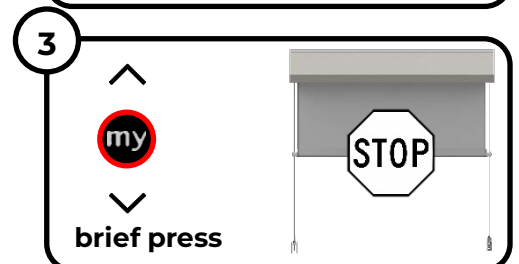
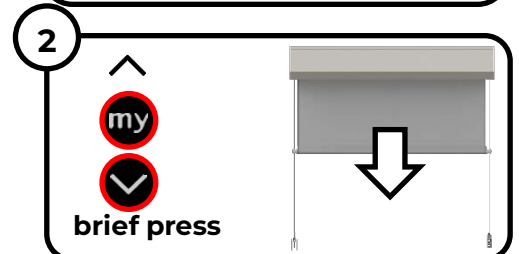
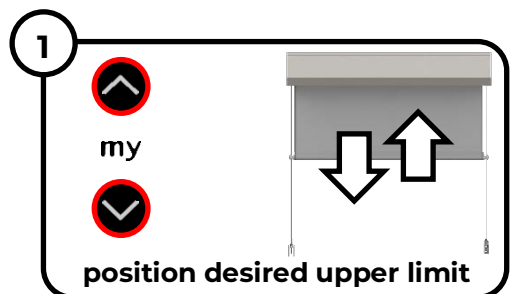


6.53 Set Upper and Lower Limits

Use the **UP** and **DOWN** buttons to position the shade in the desired upper limit position.

Press the **MY** and **DOWN** buttons simultaneously. The upper limit is now set and the motor will rotate in the down direction.

Press the **MY** button to stop the motor at the desired lower limit position.



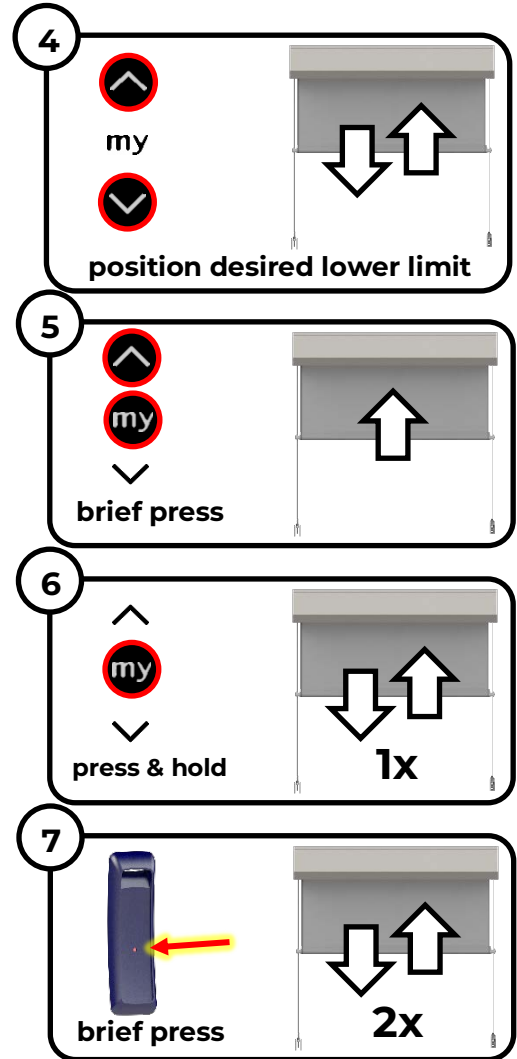
Motorized Patio Shade Installation Instructions

Use the **UP** and **DOWN** buttons to position the shade in the desired lower limit position.

Press the **MY** and **UP** button simultaneously. The lower limit is now set and the motor will rotate in the up direction. Allow the motor to rotate all the way to the upper limit then stop on its own. (DO NOT PRESS ANY BUTTONS AT THIS TIME)

Confirm the limits by pressing and holding the **MY** button until the motor jogs one (1) time.

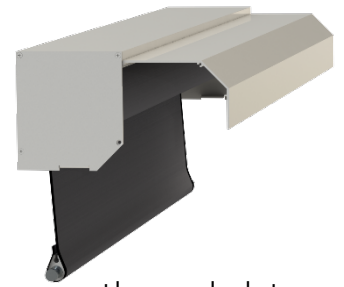
Then press the **PROGRAM** button on the back of the remote with a paper clip. The shade will jog up and down one (1) time to confirm that the limits have been set.



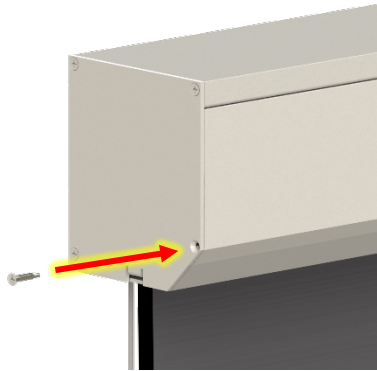
Motorized Patio Shade Installation Instructions

7.0 Head Box Front Cover Installation

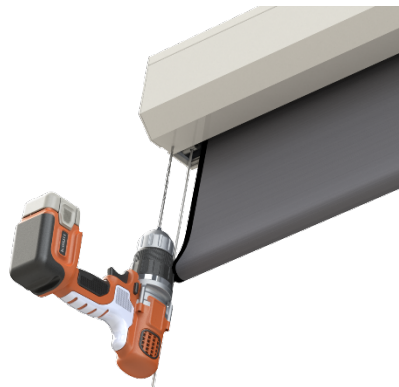
Insert the front cover tongue into the back cover groove, the front cover needs to be perpendicular in order to fit properly into the groove of the back cover. After correctly inserting the front cover into the groove, the front cover will stay engaged as it closes. Secure the end plate to the front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

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.