

DEALER TRAINING · COURSE 2

Shades 101

Window covering basics, roller shade anatomy, controls, fabrics and how to measure. The starting point for anyone new to shades.



What you will learn

About 45 minutes. Questions any time.

01

The window covering family

Roller, Roman, zebra, drapery, panels, exterior

02

Anatomy of a roller shade

Every part, and what it is called

03

Configurations and finishes

Single, dual, coupled and how to finish the top

04

How shades operate

Chain, cordless, wand and motorized

05

Fabrics and light control

Openness, blackout, privacy and performance

06

Mounting and measuring

Inside vs outside mount and how to measure right

SECTION 01

The window covering family

Know the main product types before you sell any of them.

YOUR TURN

A customer wants to darken a bedroom. What do you show first?

The main types of window coverings



Roller shades

A single piece of fabric that rolls onto a tube. Clean, modern and the most versatile.



Roman shades

Fabric that stacks in soft folds as it rises. Warmer, more decorative look.



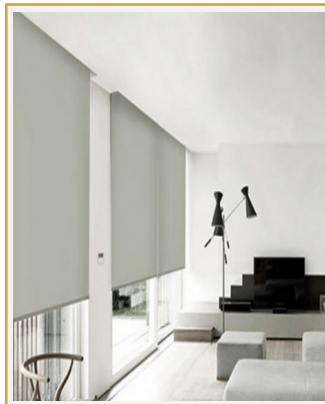
Zebra shades

Alternating sheer and solid bands that slide past each other to filter light.



Drapery

Fabric panels on a track that draw side to side. Pleated, ripplefold or grommet.



Recessed shades

Roller shades hidden in a pocket in the ceiling so they disappear when up.



Exterior screens

Heavy duty screens outside the glass that stop heat before it gets in.

Why roller shades lead the market

Clean and simple. One piece of fabric, nothing to tangle or break.

Huge fabric range. From see-through screens to full blackout.

Easy to motorize. The motor slides inside the tube, out of sight.

Fits any project. Homes, offices, hotels, schools and hospitals.

Scales up. Coupled and linked shades cover big window walls with one control.

Most of what a dealer sells is a roller shade. Learn it first, the rest builds on it.



SECTION 02

Anatomy of a roller shade

Learn the parts and you can read any quote or order.

YOUR TURN

Which end of the shade does the work, and what is the other end called?

The parts of a roller shade

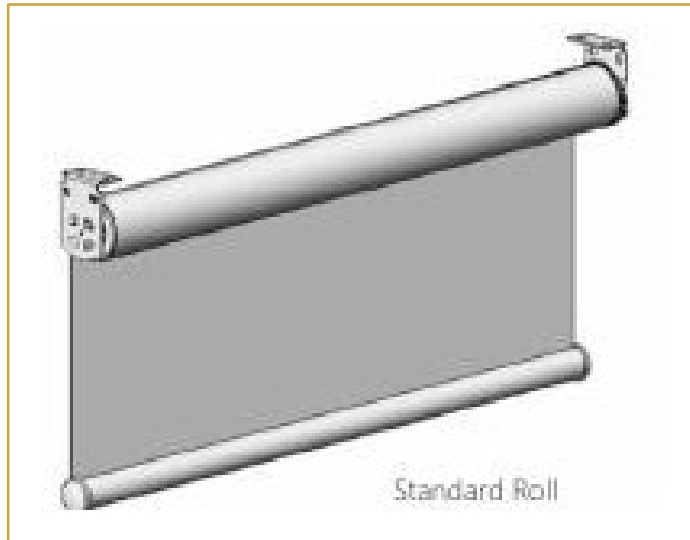


Open roll shade with chain clutch and bracket

PART AND WHAT IT DOES	
Tube	The aluminum roller the fabric wraps around
Fabric	The shade cloth itself, chosen for light and look
Brackets	Hold the shade to the wall, ceiling or window frame
Clutch or motor	Raises and lowers the shade, one end of the tube
Idler end	The plain end opposite the clutch or motor
Hem bar	Weighted bar at the bottom that keeps fabric straight
Header	Optional cover over the roll: fascia, cassette or pocket

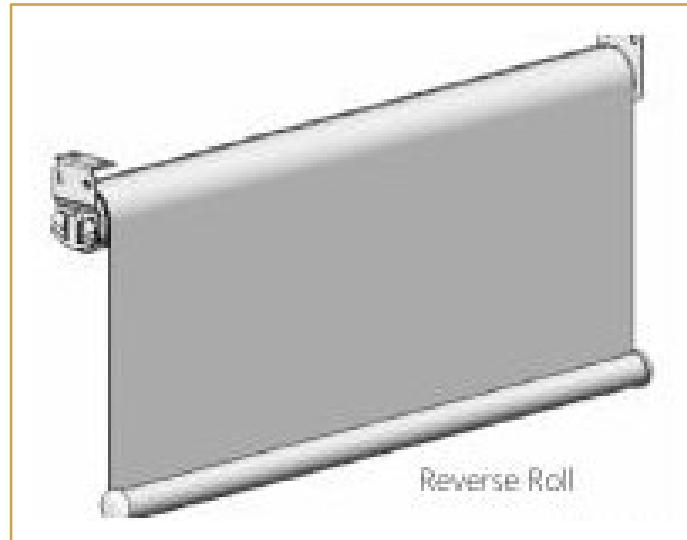
Standard roll vs reverse roll

Which side of the tube the fabric drops from.



STANDARD ROLL

Fabric drops from the back of the tube, closest to the glass. The default.



REVERSE ROLL

Fabric drops from the front of the tube, toward the room. Hides the roll from view.

WHEN TO USE REVERSE ROLL

- Clearing a window crank or handle that sticks out
- Hiding the tube on an open roll shade
- Matching an existing shade in the room

Always note the roll direction on the order.

Roller shade configurations

Same parts, arranged for different windows and needs.



Single

One shade on one window. The simplest setup.



Dual

Two shades on one bracket, usually a screen and a blackout.



Coupled

Several shades linked so one control runs them all.



Bottom up

Rises from the sill. Privacy below, light above.



Blackout

Side and sill channels seal the edges against light.

Finishing the top: the upgrade path

Each step hides more of the roll and blocks more light at the top.



1 Open roll

Fabric and tube are exposed. Clean and minimal.



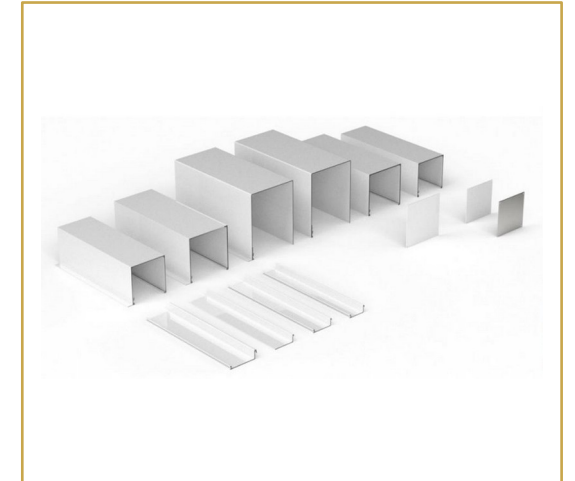
2 Fascia

Aluminum cover snaps over the front of the roll.



3 Cassette

Fully enclosed box, square or round, with fabric insert.



4 Ceiling pocket

Recessed in the ceiling. Shade disappears when up.

SECTION 03

How shades operate

Manual, cordless or motorized.

YOUR TURN

How many of your customers ask for cordless or motorized now?

Control options

● Chain and clutch

A bead chain turns a clutch to raise and lower the shade. Simple and economical.

● Cordless spring

Pull down, let go, it stays. A spring inside the tube does the work. No cords.

● Twin pull wand

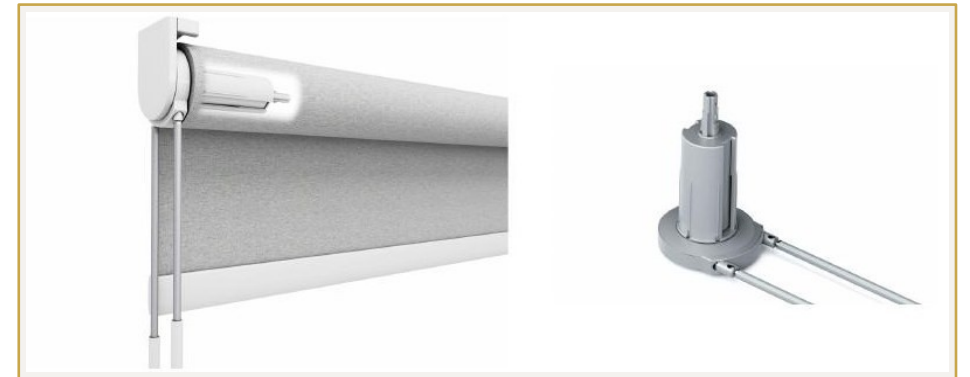
A slim wand lifts and lowers the shade. Clean look, no loops.

● Motorized

A motor inside the tube. Remote, wall switch, app, voice or a home control system.



Cordless shade



Twin pull wand

Motorized: how the motor gets power

POWER TYPE AND WHEN TO USE IT

Rechargeable battery	No wiring. Charge every so often or add a small solar panel. Best for retrofit.
Low voltage (DC)	12V or 24V from a power supply. Low voltage cable, often no electrician.
Line voltage (AC)	110 to 120V from the building. For large shades and new construction.
PoE	Power and control over one network cable. Popular with AV integrators.
Wired switch	A simple wall switch runs the motor up and down, no wireless layer.

The right power type depends on the window size, the wiring available and how it will be controlled.



Motor, remote and app control

Child safety comes first

Corded products must be installed safely, every time.

Recommend cordless or motorized anywhere children may be. No accessible cords at all.

Chain shades get a tension device. Our Chainhold device keeps the chain taut and anchored to the wall.

Installed correctly or it will not work. The shade will not operate properly unless the tension device is installed.

Keep cribs and furniture away from windows with corded products, and leave the warning labels on.

Chainhold helps chain operated shades meet the ANSI/WCMA A100.1-2022 safety standard.



SECTION 04

Fabrics and light control

Fabric decides how the shade looks and what it does.

YOUR TURN

What is the first question you ask a customer about fabric?

Choosing fabric by what it needs to do



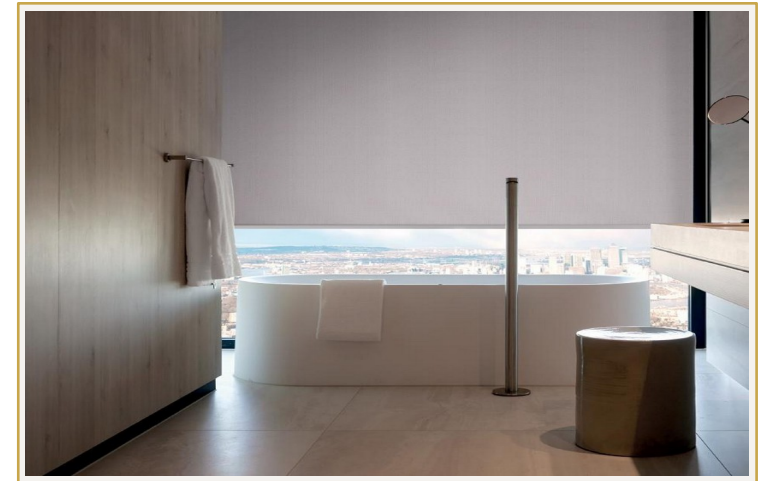
SOLAR SCREEN

Woven with a set openness. Cuts glare and heat but keeps the view. Less private at night.



LIGHT FILTERING

Soft, diffused light and daytime privacy. You cannot see through it.



BLACKOUT

Blocks light through the fabric. Add side channels for a true dark room.

Fabric terms to know

TERM AND WHAT IT MEANS	
Openness factor	Percent of open weave in a screen. Lower means more privacy and less view.
Fabric width	Rolls come in set widths. Wider windows may need a seam or railroading.
Railroading	Turning the fabric sideways to cover a wide window without a seam.



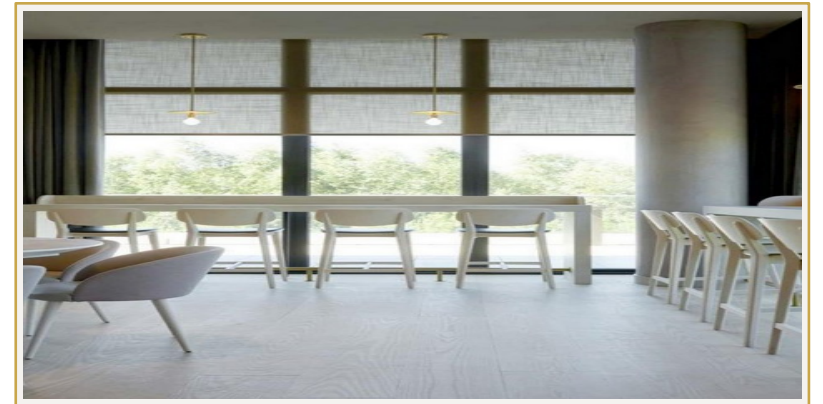
Solar screen: the view stays, the glare drops

Pick by function first: view, privacy, glare or darkness. Then pick the color.

Commercial jobs: fabric specs

TERM AND WHAT IT MEANS

PVC free	Fabric made without PVC. Asked for on green building jobs.
FR / MA compliant	Fabrics tested to flame codes required in commercial work.
EPD	Environmental Product Declaration, available on specific fabric collections.



Solar screen: the view stays, the glare drops

Specs and architects ask for these. Check the fabric card before you promise one.

SECTION 05

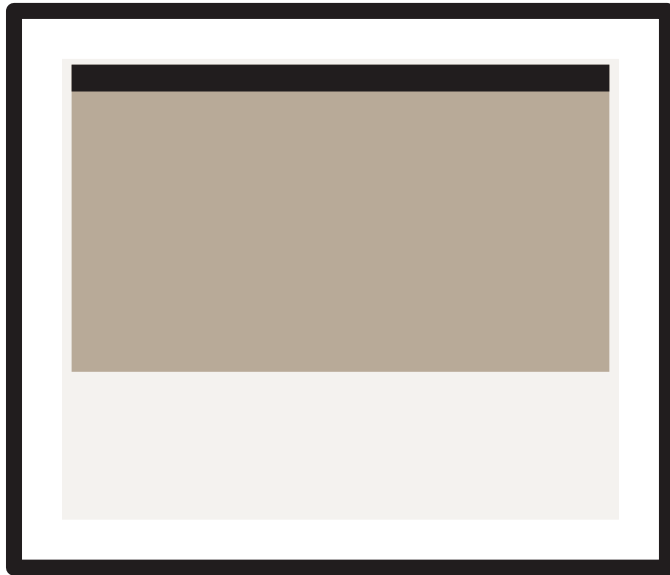
Mounting and measuring

Most expensive mistakes start with a tape measure.

YOUR TURN

Ever had to remake a shade over a measurement? What happened?

Inside mount vs outside mount



INSIDE MOUNT

Sits inside the window frame. Clean, built in look. Needs enough depth.



OUTSIDE MOUNT

Mounts on the wall or ceiling and overlaps the opening. Better light control, hides a shallow frame.

HOW TO CHOOSE

- Shallow frame? Go outside mount.
- Want darkness? Outside mount or side channels.
- Crank or handle in the way? Check clearance.
- Fascia or cassette? Confirm the depth fits.

How to measure

Steel tape, to the nearest 1/8 inch. Always width first, then height.

INSIDE MOUNT		OUTSIDE MOUNT	
1. Check depth	Make sure the opening is deep enough for the brackets	1. Coverage	Measure the area you want covered
2. Width	Measure top, middle and bottom. Use the narrowest	2. Add width	Add about 2 to 3 inches past the opening on each side
3. Height	Measure left, center and right, to the sill	3. Add height	Add room above for the brackets and below for overlap
4. Order it	Send the actual opening size. We take the deductions	4. Surface	Confirm a flat, solid surface to mount on

Write it W x H, every time. Swapped width and height is one of the most common ordering mistakes.

Light gaps and deductions

Why the fabric is a little narrower than the shade.

The factory takes the deductions. You order the opening, we make the shade fit and operate.

Fabric is narrower than the shade. Room is needed for the clutch, idler end and brackets.

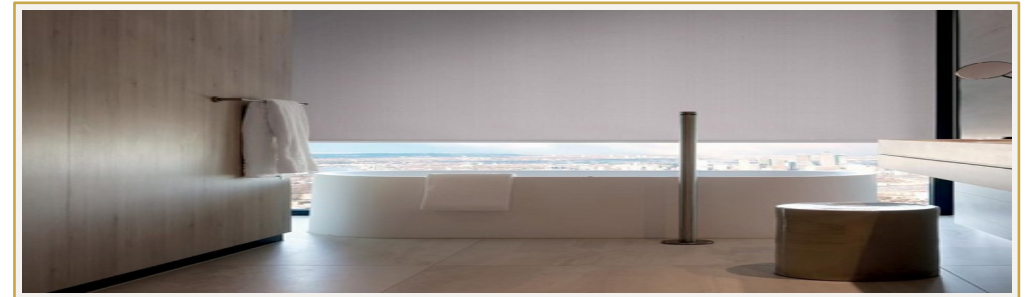
Small side gaps are normal. Especially on inside mount shades.

Need darker? Use an outside mount, side channels or a dual shade.

Set the expectation with the homeowner before install, not after.



Blackout side channel system



Common mistakes to avoid

- **Width and height swapped**

Always write W x H.

- **Measuring the glass, not the opening**

Measure the frame opening you are mounting in.

- **Taking your own deductions**

Order the actual size. We deduct.

- **Ignoring obstructions**

Cranks, handles, alarms and trim all matter.

- **Not checking depth**

Fascia, cassettes and pockets need room.

- **Missing the control side**

Note left or right for the chain or motor.

Quick glossary

TERM AND MEANING	
Clutch	The mechanism a bead chain turns to raise and lower a manual shade
Idler end	The end of the tube opposite the clutch or motor
Hem bar	The weighted bar at the bottom of the shade
Fascia	An aluminum cover that hides the roll and brackets
Coupled shades	Several shades linked and run by one control
Dual shade	Two shades on one bracket, usually screen plus blackout
Side channels	Tracks on the sides of the window that block light leaks
Telescoping	Fabric drifting left or right as it rolls up and down
Finished width	Outside of the left bracket to outside of the right bracket

Knowledge check

Six questions. Pick the best answer, then check the next slide.

1 Which part keeps the fabric hanging straight at the bottom?

- A Idler end
- B Hem bar
- C Fascia

2 Inside mount: which of your three width readings do you send?

- A The narrowest
- B The widest
- C The middle, minus your deductions

3 A window crank sticks out into the room. What helps the shade clear it?

- A Standard roll
- B Coupled shades
- C Reverse roll

4 The customer wants to cut glare but keep the view. Which fabric?

- A Solar screen
- B Light filtering
- C Blackout

5 What does the Chainhold device do on a chain shade?

- A Locks the shade at any height
- B Keeps the chain taut and anchored
- C Replaces the clutch

6 Which motor power type fits a retrofit with no wiring?

- A Line voltage (AC)
- B PoE
- C Rechargeable battery

Knowledge check: answers

Shades 101

#	Answer	Why
1	B Hem bar	The weighted hem bar keeps the fabric straight.
2	A The narrowest	Order the actual opening. The factory takes the deductions.
3	C Reverse roll	Reverse roll drops the fabric from the front of the tube.
4	A Solar screen	Screens keep the view. Lower openness means more privacy.
5	B Keeps the chain taut and anchored	Helps meet ANSI/WCMA A100.1-2022. Install it or the shade will not work right.
6	C Rechargeable battery	No wiring. Charge it now and then or add a small solar panel.

Where to go next

Shades 101 is the foundation. Pick the courses that match what you sell.

ELECTIVE COURSES, ALL FREE	
3	Product Architecture: Interior Roller Shades
4	SBM Fabric Collections
5	Exterior Shading Systems: Renson & ZipScreen
6	Soft Treatments: Drapery & Roman Shades
7	Specialty & Recess Pocket Systems
8	Motorization & Integration
9	Sales Strategy, Objections & Winning the Job
10	Installation & Service
11	Portal Order Entry (hands on)
Every course is live, one on one, and booked around your schedule.	



Your next steps

● Dealer application in

Not on file yet? Send it today.
Nothing ships without it.

● Get the shade binder

Our sampling kit. Every fabric in
your hands.

● Book your next course

Live, one on one and free. Book
it before you hang up.

● Keep the measuring card

One page. Keep it in the truck.

● Get into the portal

Quote, order and track every job
online.

● Call before you order

Angle tops, skylights, exterior. A
five minute call beats a remake.



One Partner for All Shading Solutions.

New Jersey | Chicago | Los Angeles

www.shadesbymatiss.com | info@shadesbymatiss.com | (800) 493-2040