



Zip-Ext Product Sales Rep Checklist

Do's & Don'ts

DO's

1. **Highlight Wind Resistance**
 - Emphasize that the Zip-Ext shades can withstand winds up to 65-70 mph when installed correctly.
 - Ensure the customer understands proper installation for maximum wind resistance.
 2. **Recommend Outside Installation**
 - Always recommend installing the shades on the **outside** of the frame. This minimizes the need for extra gap-filling and offers a cleaner look.
 - Point out that there will be minimal gap-filling (about 1/4 inch at the back of the channel) in most cases, especially if the wall is slightly curved due to standard construction.
 - **For outside mount installations**, you need to measure:
 - **Width:** Add **6 inches** to the width to allow space for the tracks to mount on the outside frame wall.
 - **Length (Drop):** Add a minimum of **8 inches** to the drop to ensure the headbox and bottom rail don't obstruct the view.
 3. **Explain Inside Frame Installation Details**
 - If the customer insists on inside-frame installation, explain **possible gaps** after installation due to non-straight walls. These gaps will need to be sealed with caulking, silicone, or even stucco by the homeowner.
 - Inform them that the shades must be installed level for proper function of the shades.
 4. **Account for View Obstruction**
 - Clearly communicate that **inside-frame installation** will obstruct about 3 inches on each side and approximately 8 inches at the top of the view due to the headbox and bottom rail.
 - This obstruction includes:
 - **Headbox** (approximately 5 inches in height).
 - **Bottom Rail** (about 2.5 inches) and the weatherstrip at the bottom.
 - Be upfront about the impact on visibility.
 5. **Measure Carefully and Plan for Motor Placement**
 - The motor placement is determined based on the **best configuration for the project**.
 - Ensure the motor is ordered for the correct side based on the project's needs (e.g., accessibility, power source location, etc.).
 - Plan ahead for how the wiring will be run to ensure a smooth and efficient installation. *(take note if electrician will be needed).
 6. **Color Options for Headbox and Channels**
 - Clearly inform customers that there are **only three color options** for the headbox and side channels: **White, Grey, and Chocolate**. *(Black will be available in the coming months)
 - Set realistic expectations about these limited color choices.
 7. **Prepare for Minor Light Leakage**
 - Be transparent about the potential for **slight light leakage** at the bottom of the shade when fully closed.
 - This may be due to the water runoff from their flooring. It's important to make them aware of this possibility so there are no surprises.
 8. **Guide on Gap-Filling After Inside Installation**
 - If installing inside the frame, guide customers on how to fill any remaining gaps using **caulking, silicone, or stucco**.
 - Provide advice on choosing the right materials for a professional finish. *(installer will not deal with Stucco Finish)
 9. **Measure Three Points for Inside Mount**
 - When measuring for **inside mount installation**, always measure **three points** of the opening: the top, middle, and bottom.
 - Use the **smallest measurement** to ensure proper fit and installation.
 - If there is a significant difference between the measurements, inform the customer that **gaps will need to be dealt with** after installation. (opening might not be completely square)
-

DON'Ts

1. **Don't Mislead About No Gaps for Inside Installation**
 - Do not suggest that **inside-frame installations** will have no gaps. Always inform customers about the likelihood of needing to fill gaps after installation.
 2. **Don't Promise No View Obstruction for Inside Installation**
 - Never promise a full, unobstructed view with inside-frame installation. Ensure customers know the shade will block approximately 3 inches per side and 8 inches from the top.
 3. **Don't Overlook the Importance of Installation Levelness**
 - Don't ignore the importance of having the shades installed **perfectly level** for proper fit and functionality. Improper installation can lead to gaps and poor performance.
 4. **Don't Forget to Discuss the Motor Side**
 - Never skip discussing **which side** the motor should be installed on. Misordering the motor can result in an installation issue and **(Surcharge will be applied to switch motor to opposite side as switching motor sides involves a lot of on sight work and sometimes installer might not run the risk of switching as it involves unraveling fabric and unscrewing motor from the tube and could potentially cause damage to the shade.)**
 5. **Don't Overlook Wall and Surface Variability**
 - Don't assume that all surfaces will be perfectly straight or level. Communicate the possibility of minor wall curvature and how it may impact installation and gap-filling.
 6. **Don't Ignore the Color Limitations**
 - Don't promise more than the available **three color options** for the headbox and channels. Ensure customers understand this limitation upfront to avoid dissatisfaction later.
-

Key Recommendations

1. **Installation Location:** Recommend outside-frame installation whenever possible to avoid the hassle of filling gaps and obstructions. It's cleaner and easier for both the customer and installer.
 2. **Gap Management:** Always discuss potential gaps and how to fill them, whether for inside-frame installations or minor gaps due to wall curvature in outside-frame setups.
 3. **Motor Side & Wiring:** Be proactive in asking about the motor side preference and wiring setup early in the process to ensure smooth installation.
 4. **Color Expectations:** Set clear expectations about the available color options to avoid misunderstandings later. (White, Grey, Chocolate)
 5. **Visibility Impact:** Be transparent about the 3-inch side and 8-inch top obstruction with inside-frame installation, helping the customer make an informed decision.
 6. **Inside Mount Measurements:** Always measure the top, middle, and bottom of the opening for inside-frame installations and use the smallest measurement to move forward. If there is a significant measurement difference, inform the customer that gaps will need to be addressed.
 7. **Outside Mount Measurements:** For outside mount installations, **add 6 inches to the width** for the track mounting space, and **add 8 inches to the drop** to avoid obstruction from the headbox and bottom rail.
-

This checklist ensures that you provide a comprehensive, honest, and thorough consultation for your customers while promoting the best installation methods and managing expectations clearly.