



Thank you for selecting JELD-WEN products. Attached are JELD-WEN's recommended installation instructions for Pocket (replacement) Double-Hung, Casement, Awning, Picture or Transom Windows, designed to be installed into an existing window frame. Pocket windows may be installed from either the exterior or interior. Exterior detail work is needed in both installation types. Not all windows can be installed into every wall condition in all areas. Consult your local building department for applicable building codes and regulations (particularly regarding minimum egress requirements). Local building code requirements supersede recommended installation instructions. Areas such as Florida and the Texas TDI region have different anchoring requirements based on product certification. For information on specific products, visit [www.floridabuilding.org](http://www.floridabuilding.org) or [www.tdi.texas.gov](http://www.tdi.texas.gov) and follow the anchoring schedule given in the drawings for the product instead of the anchoring schedule in this document.

Newer construction methods have led to an increase in air and water tightness in buildings. This frequently leads to negative air pressure inside the home, which can draw water through very small openings. Our installation method integrates the window with the weather barrier of the structure (typically building wrap).

### IMPORTANT INFORMATION AND GLOSSARY

**Please Note!** The installation of a pocket window will not eliminate installation or maintenance problems with an existing window. Problems such as wood decay and water leaks around the existing frame must be investigated and fixed prior to installing a pocket window. Installation such that the window sill is higher than 35 feet above ground level or any window installation into a condition not specifically addressed in these instructions must be designed by an architect or structural engineer. Failure to install into a square, level and plumb condition could result in denial of warranty claims for operational or performance problems.

**Note to Installer:** Provide a copy of these instructions to the building owner. By installing this product, you acknowledge the terms and conditions of the limited product warranty as part of the terms of the sale.

Read these installation instructions thoroughly before beginning. They are designed to work in most existing applications. However, existing conditions may require changes to these instructions. If changes are needed, they are made at the installer's risk. For installations other than indicated in these instructions, contact a building professional.

The exterior trim (casing) around the existing window opening may be painted a color of your choice. However, optional color matched cladding to cover this trim is available for purchase and professional installation. Discuss with your dealer.

#### GLOSSARY

**Backer Rod (backing material)**

A material (e.g. foam rod), placed into a joint primarily to control the depth of the sealant.

**Butt Joint**

The joint of two square edges united without overlapping.

**Check Rail**

In a double-hung window, the bottom rail of the upper sash (upper checkrail) and the upper rail of the lower sash, where the lock is mounted (lower checkrail).

**Clad**

Pre-painted formed metal covering the exterior surface(s) of some wood windows.

**Double-Hung Window Balance System**

A system of ropes and pulleys (older) or springs (newer) used to counter-balance the weight of a sash.

**Miter Joint**

Joint made by joining two parts with 45° angles, to form a corner at a 90° angle.

**Pilot Hole**

A drilled hole that is no larger than the body of the screw (minus the threads).

**Sash**

An assembly comprised of stiles (vertical pieces), rails (horizontal pieces) and the window's glass.

**Transom**

Typically a fixed/picture window mounted above another window or door.

## SAFETY AND HANDLING

### SAFETY

- Read and fully understand ALL manufacturer's instructions before beginning. Failure to follow proper installation instructions may result in the denial of warranty claims for operational or performance problems.
- Do not work alone. Two or more people are required. Use safe lifting techniques.
- Use caution when handling glass. Broken or cracked glass can cause serious injury.
- Wear protective gear (e.g. safety glasses, gloves, ear protection, etc.).
- Operate hand/power tools safely and follow manufacturer's operating instructions.
- Use caution when working at elevated heights.

- If disturbing existing paint, take proper precautions if lead paint is suspected (commonly used before 1979). Your regional EPA ([www.epa.gov/lead](http://www.epa.gov/lead)) or Consumer Product Safety Commission offices provide information regarding regulations and lead protection.
- **WARNING:** Drilling, sawing, sanding or machining wood products generates wood dust, a substance known to the State of California to cause cancer. Use a respirator or other safeguards to avoid inhaling wood dust.

### WINDOW HANDLING

- Handle in vertical position; do not carry flat or drag on floor.
- Store window in dry, well-ventilated area in vertical, leaning position; do not stack horizontally.

**IF INJURY OCCURS, IMMEDIATELY SEEK MEDICAL ATTENTION!**

## INCLUDED PARTS, MATERIALS AND TOOLS

### PARTS INCLUDED

**Note!** JELD-WEN exterior window and door products should be installed in accordance with JELD-WEN's recommended installation and flashing directions, which are shipped with the products or can be found on our website: [www.jeld-wen.com](http://www.jeld-wen.com). Note that alternative installation methods and flashing systems may be utilized at the installer's or owner's discretion and, in such situations the installation should be done in accordance with the flashing manufacturer's instructions. Follow all material manufacturer's instructions for proper use and compatibility. When using flashing, spray adhesive/primer, sealant and foam products, we recommend using the same manufacturer and verifying compatibility. It is the End User's responsibility to determine if dissimilar materials are compatible to the substrates in the application.

- 6 - 12 #8 x 3" installation screws (not all may be needed for any given installation).
- 1 - jamb jack screw packet (includes 2 - #8 x 2" screws and instructions for operating double-hung windows only).
- 1 - shim packet; 2 - shim packets for non-operating units.
- Vinyl jambliner hole plugs if applicable (does not apply to Custom).
- Clad exterior cover strips (optional, based on order and product type).
- 1 - 14° aluminum sill adapter (all Tradition Plus/W-4500 clad products).
- 1 - Wood sill adapter. Tradition Plus/W-4500 wood double-hung only, will have a 14° and 10° adapter; Custom products will have a 0°, 8° or 14° adapter or sill nose based on product order details.
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### NEEDED MATERIALS

- Sealant: We recommend OSI® QUAD® Max Sealant or equivalent. This can be used in any application and can be painted or ordered in a color matched product, if desired.
- Polyurethane low expansion Window and Door foam: We recommend OSI® QUAD® Foam or equivalent).
- Backer rod 1/8" larger than the widest portion of the gap (used in conjunction with sealant bead).
- Wood trim pieces, milled on site to fit on exterior side of window between replacement window and existing window frame.
- 4d exterior finish nails.

### NEEDED TOOLS

- Tape measure
- Level
- Hammer
- Utility knife
- Screwdrivers (driver with #2 Phillips and flat blade)
- Putty knife
- Drill with bits
- Reciprocating saw (for exterior install)
- Caulk gun

**1 REMOVE PACKAGING AND INSPECT WINDOW**

**REMOVE PACKAGING**

Remove packaging materials such as corner covers, shipping blocks or pads.

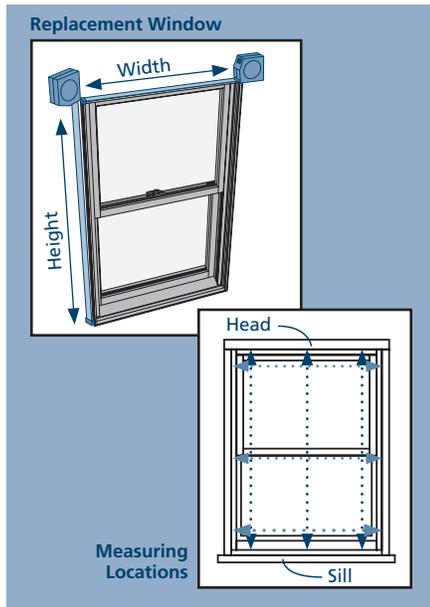
**INSPECT WINDOW**

- Cosmetic damage.
- Included parts.
- Correct product (size, color, grid pattern, glass type, energy-efficiency requirements, etc.).

If any of the above represents a concern, **BEFORE** installing, contact your dealer or distributor for recommendations.

**CONFIRM MEASUREMENTS**

- Confirm the replacement unit will fit properly. Measure the height and width of the replacement unit.
- Check existing frame measurements. Measure the width between the side jambs at the top, middle and bottom (remove jambliner if necessary). Measure the height between the head and sill at the left side, middle and right side. Note measurements to compare with replacement unit in next step.

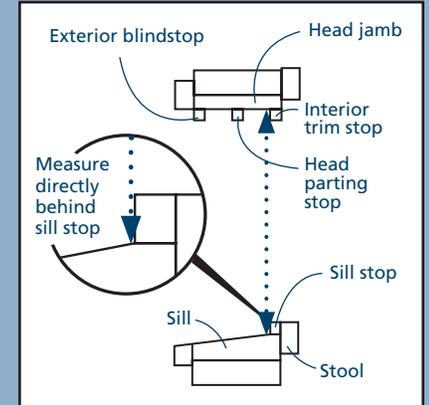


Unless the unit was ordered as "build to specified dimension" ensure that:

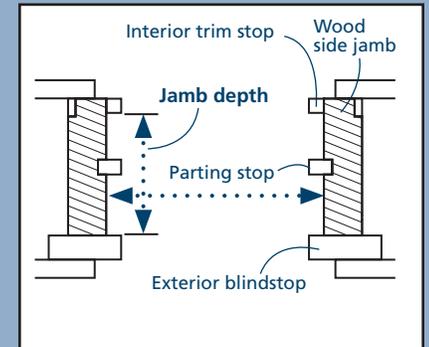
- The replacement unit is 1/2" narrower than the smallest existing frame width measurement.
- The replacement unit (with applied sill adapter) is at least 1/4" shorter than the smallest existing frame height measurement.
- The existing frame jamb depth ("pocket") must be 3/4" or greater for all windows except the Tradition Plus/W-4500 casement, which requires at least a 4" pocket.

**Note!** These instructions assume an installation from the exterior (most common). Alternate instruction steps for installation from the interior are shown in *italic* type.

**Height Measurement**



**Width Measurement**



**FOR RETROFIT INSTALLATIONS**

After removing the old window, contact your local waste management entities for proper disposal or recycling of products being removed.

**2**

**REMOVE EXISTING SASH AND PREPARE OPENING**

**EXTERIOR/INTERIOR INSTALLATION**

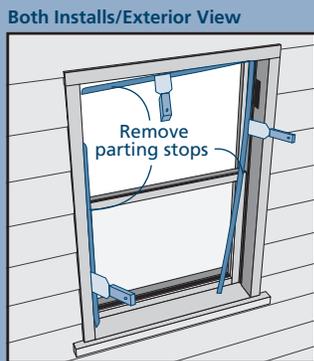
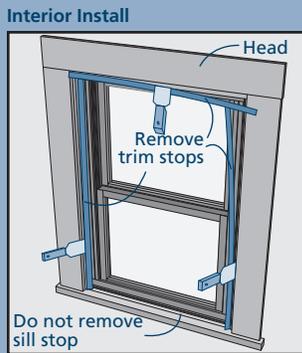
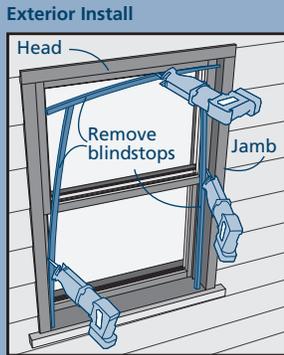
For non-operating units, remove and dispose of wood stops and sash or glass.

**Exterior Installation:** Remove or cut exterior blindstops at head and sides flush with jambs.

Do not remove interior trim stops or sill stop.

**Interior Installation:** Remove or cut any interior trim stops at head or sides flush with jambs. Interior trim stops may be reused if not damaged.

Do not remove interior sill stop or exterior blindstops at head and sides.



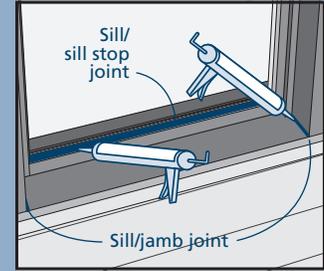
**Exterior/Interior Installation:**

Apply 100% polyurethane sealant to sill/sill stop and sill/jamb joints.

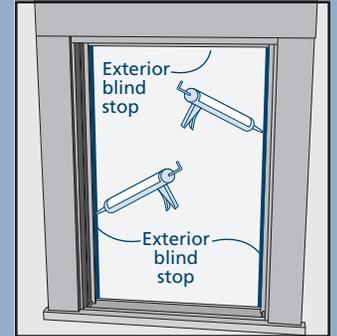
**Interior Installation:**

Also apply a 1/4" bead of sealant to interior side of exterior blindstops on sides and head.

**Both Installs/Exterior View**



**Interior Install**



**Exterior/Interior Installation:**

For operating units, remove and dispose of existing sash, balance system (e.g., cut balance cords and unscrew pulleys), head and jamb parting stops.

**3**

**INSTALL WINDOW AND SEAL**

**Exterior/Interior Installation:**

1. Operating double-hung windows will have installation holes pre-drilled through the jamb liners. Remove screen from the Tradition Plus/W-4500 operating casement windows. For all other products, remove the interior trim or sash stop to gain access to fastener holes.
2. Slide replacement window into the opening until tight against existing trim stops. Be sure to hold window in place until fully secured.

**Exterior Installation:**

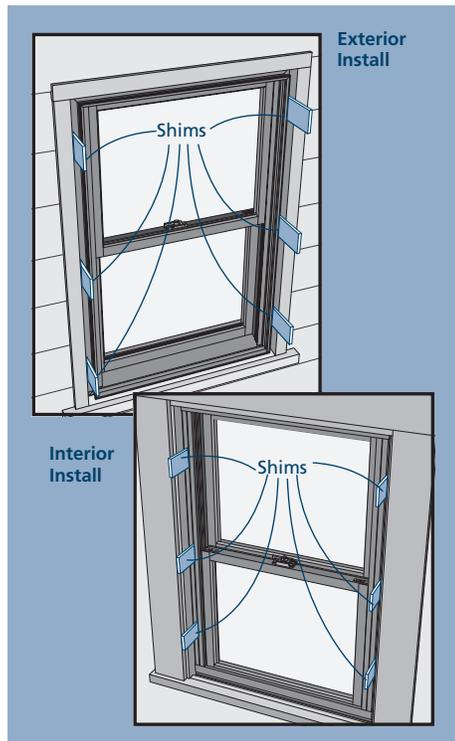
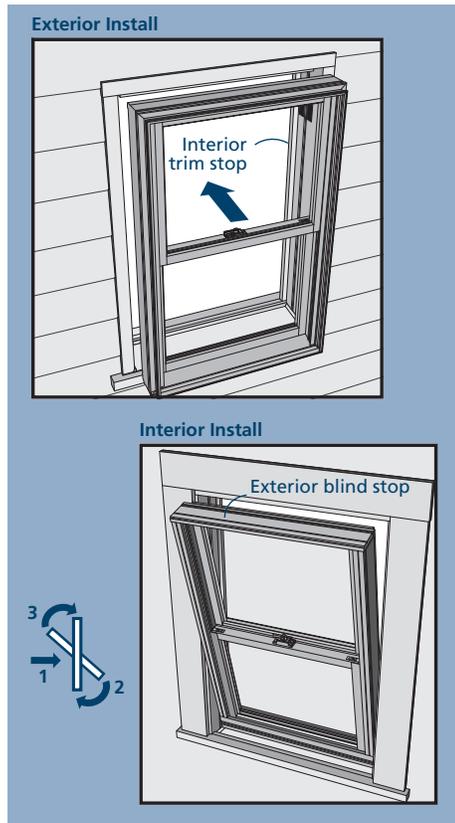
For custom double-hung windows only, position sill adapter all the way to the interior. For Custom Casement/Awning/Picture windows, tack sill adapter 1-7/32" from the interior and set window into place.

**Interior Installation:**

For custom double-hung windows only, lift window and slide sill adapter underneath sill positioned all the way to the interior.

**Both Installations:**

3. Drill a pilot hole through the lower right installation hole in the double-hung vinyl jambliner or in the interior wood stop installation hole on Tradition Plus/W-4500 casement, Tradition Plus/W-4500 awning, or fixed windows. Install one of the installation screws, but do not fully tighten.
4. Shim unit and verify window is square, level and plumb.



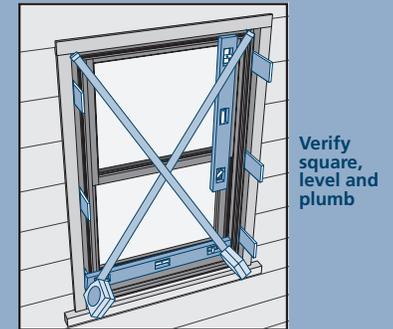
5. For Custom Casement/Awning/Picture windows only, gently pry out and remove the interior trim (screen stops, operator cover etc.) from the head, sill and sides for access to installation holes. Drill pilot holes into existing frame through pre-drilled installation holes in the replacement window jambs.

6. Install screws in every pre-drilled hole and tighten all screws appropriately. Re-apply all previously removed interior trim and sash stops. Tradition Plus/W-4500 double-hung operating units are supplied with color-matched vinyl caps. For casement windows, natural wood caps are available through dealers. Install caps into the installation holes as desired.

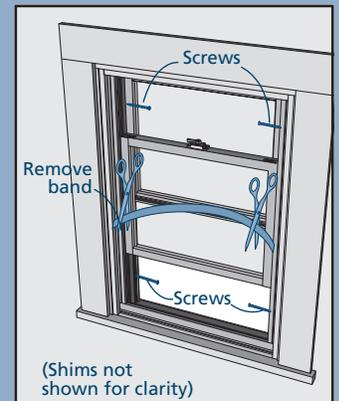
7. On double-hung operating windows, remove the band securing the jambs at the check rail and remove the lower sash.

8. On double-hung operating units only, jamb jack hardware is mounted in the middle installation holes to allow for some jamb adjustment. Install jamb jack screws until captured (first 'click'), the screw may then be screwed in or out to adjust the jamb as needed. Replace lower sash.

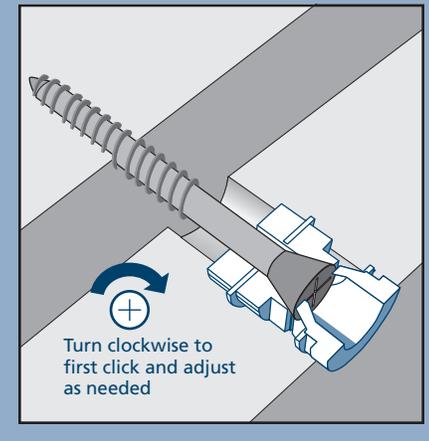
**Both Installs/Exterior View**



**Both Installs/Interior View**



**Jamb Jack**



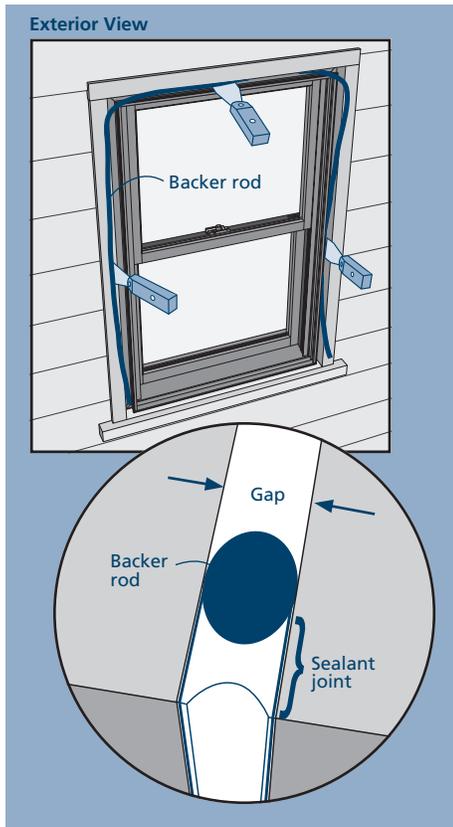
**3** INSTALL WINDOW AND SEAL - CONTINUED

**Exterior Installation:**

On the exterior, insulate between the existing frame and replacement window frame with low expansion foam. Seal with backer rod and sealant at only the head and side jambs.

**Interior Installation:**

On the interior, insulate between the existing frame and pocket window frame with low expansion foam. Seal with backer rod and sealant all the way around the window.



**Exterior Installation:**

- Metal clad double-hung, fixed and casement windows, installer must supply and mill four wood trim pieces to fit on the exterior front between replacement window frame and existing frame. Tack into place.
- Wood double-hung and fixed windows, installer must supply and mill three (for head and side jambs only) to fit on the exterior front between replacement window frame and existing frame. Tack into place.
- For all wood products, if not previously installed, tack the provided sill adapter into place between the jamb trim pieces (cut to length if necessary).



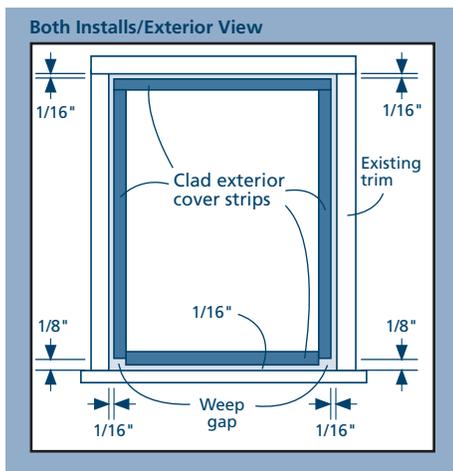
**Interior Installation:**

- For Tradition Plus/W-4500 clad products, installer must supply and mill a wood sill piece. For all wood products, tack the provided sill adapter into place between the jamb trim pieces (cut to length if necessary).
- Reuse previously removed interior trim, or mill new pieces to cover interior joint between replacement window frame and existing frame. Tack into place.

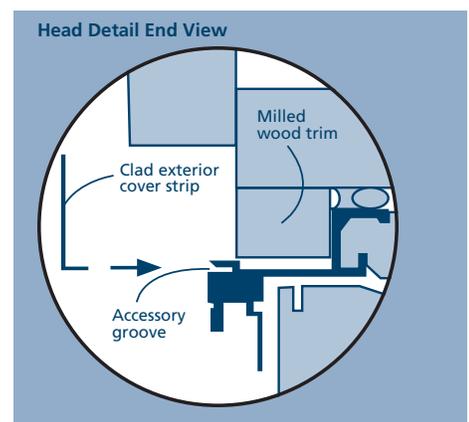
**4** COMPLETE INSTALLATION

**Note!** If the existing exterior trim (casing) is to be wrapped with color-matched aluminum cladding, this cladding **MUST** be professionally installed prior to the installation of the clad exterior cover strips. The following instructions are for a simple butt joint application. A miter joint application is feasible at the installer's risk; be sure to allow for a weep gap.

1. On metal clad double-hung and casement windows, cut and apply clad exterior cover strips.

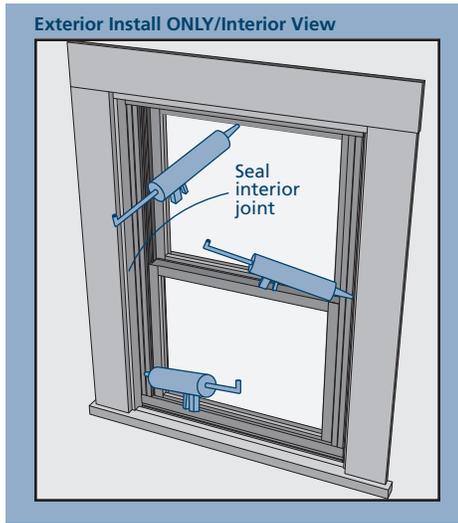


- a. Measure the distance between the existing side jamb trim pieces and subtract 1/8". Cut the head clad exterior cover strip to length. Center and tap the head strip into the accessory groove.
- b. Cut two side jamb clad exterior cover strips, leaving a 1/8" weep gap at the sill. Tap the strips into the accessory groove.
- c. Cut the sill clad exterior cover strip (for Tradition Plus/W-4500 windows only, a 14° sill adaptor may be used in place of cladding strip) to fit between the two side jamb strips, leaving a 1/16" gap above the sill. Tap into the accessory groove.

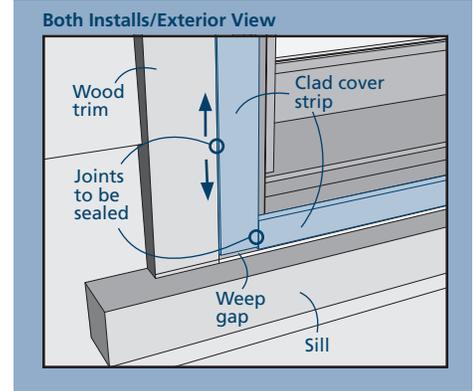


**4** COMPLETE INSTALLATION - CONTINUED

**Exterior Installation:**  
Seal the interior joint between the existing frame and the replacement window with 100% polyurethane sealant.  
**Interior Installation:**  
• Skip this step.



**Exterior/Interior Installation:**  
Use 100% clear silicone sealant (color matched polyurethane sealant may be used on metal clad), to seal the exterior joints. Seal any metal-to-metal cladding joints if applicable. Do not seal the 1/8" weep gap on the sill ends. When sealing between the existing sill and the sill adapter on a wood product, leave 1" weep gaps on both ends.



**AFTER INSTALLATION**

Finish any exposed wood surfaces. Metal-clad aluminum does not require additional finishing.

Please visit [jeld-wen.com](http://jeld-wen.com) for warranty and care and maintenance information.

Thank you for choosing

