



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.

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.

### IMPORTANT INFORMATION & GLOSSARY

Consult your local building department for applicable building codes and regulations (particularly regarding minimum egress requirements). Local building code requirements supersede recommended installation instructions.

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.

**Please Note!** 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.

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.

Estimated Install Time for New Construction	<input type="text"/>	First Time: 4.0 hr.
	<input type="text"/>	Experienced: 2.5 hr.
	<input type="text"/>	Professional: 1.5 hr.



### 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 & HANDLING

#### SAFETY

- Read and fully understand ALL manufacturers' instructions before beginning.
- 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.
- Windows in older homes may be painted with lead-based paint. Take precautions to minimize exposure to lead-based paints if removal of existing sashes disturbs the paint. 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.

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

#### 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.

**NEEDED MATERIALS & TOOLS**

**PARTS INCLUDED**

- 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 clad double-hung windows only)
  - 1 - shim packet; 2 - shim packets for non-operating units
  - Vinyl jambliner hole plugs if applicable
  - 4 - clad or wood exterior cover strips (based on window type)
  - 1\* - 14° aluminum sill adapter (clad double-hung and casement)
- \* not included with non-operating units

**MATERIALS**

- High quality 100% polyurethane sealant (color matched to cladding if desired)
- Polyurethane low expansion foam (Dow Great Stuff™ Window and Door or equivalent)
- Backer rod
- Wood trim pieces, milled on site to fit on exterior side of window between replacement window and existing window frame

**TOOLS**

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

**1 REMOVE PACKAGING & INSPECT WINDOW**

**REMOVE PACKAGING**

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

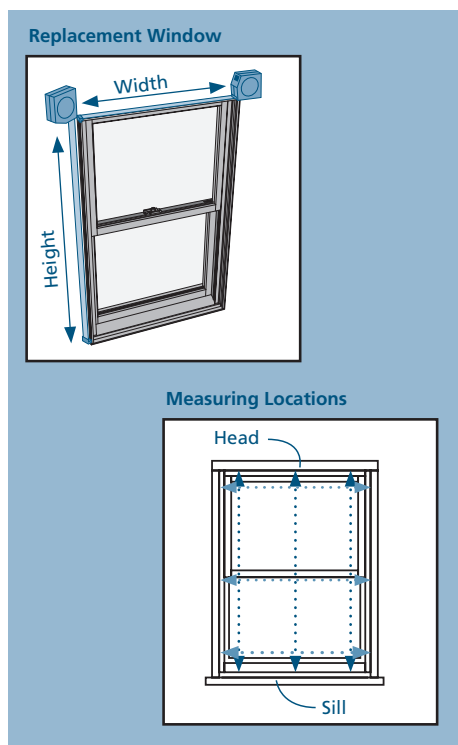
**INSPECT WINDOW**

- 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.



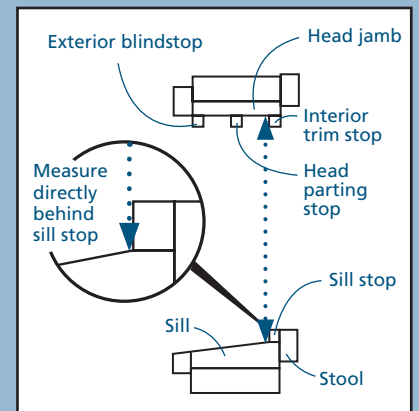
Unless the unit was ordered as "build to specified dimension" ensure that:

- The replacement unit is 1/2" narrower than the smallest existing frame width measurement.
- The replacement unit is 1/4" shorter than the smallest existing frame height measurement.

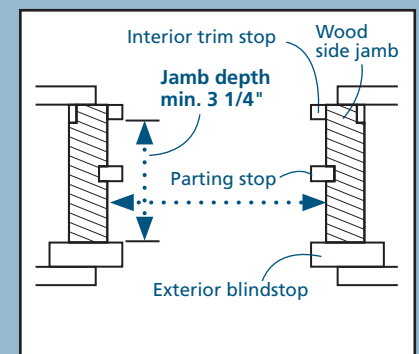
- The existing frame jamb depth ("pocket") must be 3 1/4" or greater (no minimum requirement for casement or wood double-hung windows).
- If installing a wood double-hung, the sloped sill must be 8° or larger.

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

**Height Measurement**



**Width Measurement**



**2 REMOVE EXISTING SASH & PREPARE OPENING**

**EXTERIOR/INTERIOR INSTALLATION**

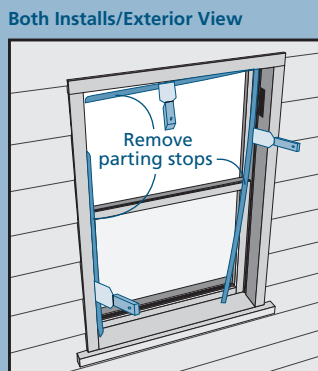
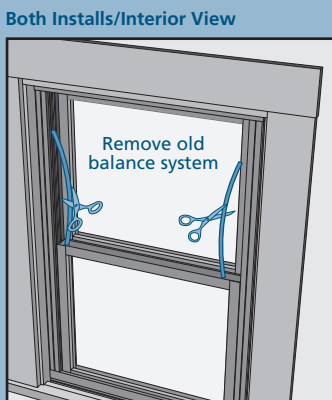
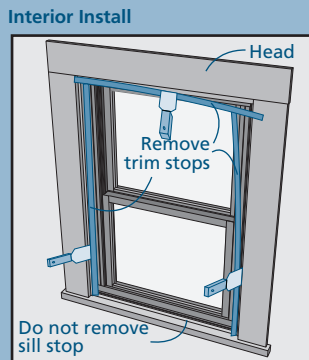
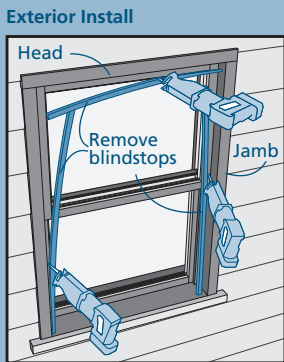
For non-operating units, remove and dispose of wood stops and sash or glass.

**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.



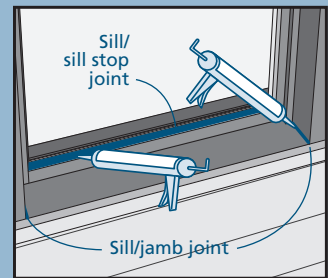
**Exterior/Interior Installation:**

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

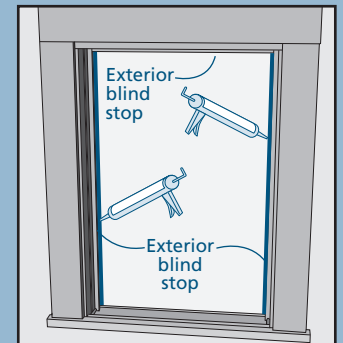
**Interior Installation:**

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 & SEAL

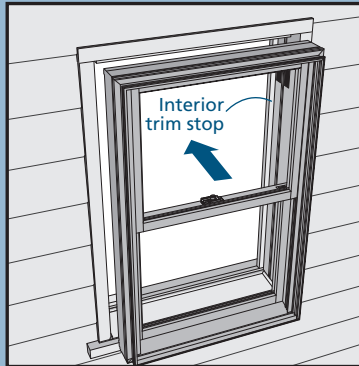
**Exterior/Interior Installation:**

1. Slide replacement window into the opening until tight against existing trim stops. Be sure to hold window in place until fully secured.
2. Drill a pilot hole through the lower right installation hole in the double hung vinyl jambliner or in interior wood stop on casement, awning, or fixed windows. Install one of the installation screws, but do not fully tighten.

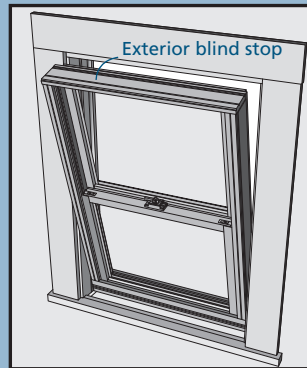
**Note!** If the replacement unit is a non-operating double-hung style picture or transom unit, remove the interior wood trim on the head and side jambs to access the installation holes.

3. Shim unit and verify window is square, level, and plumb. Position shims so they can be removed after screws have been installed.

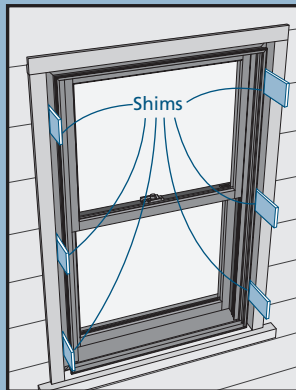
Exterior Install



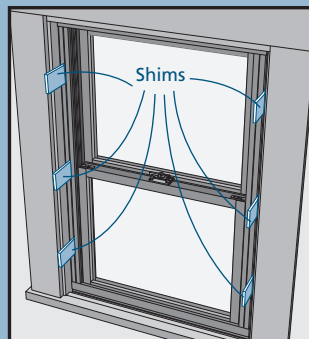
Interior Install



Exterior Install

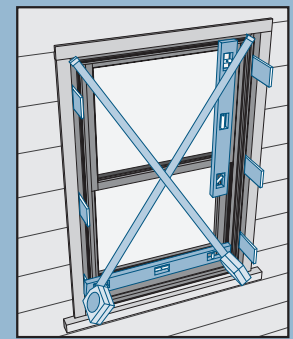


Interior Install



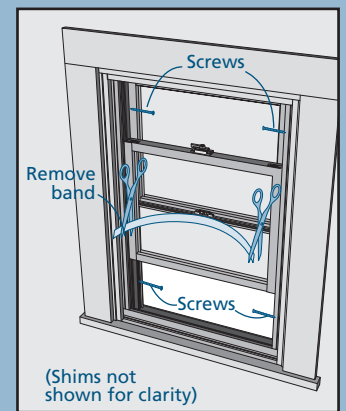
4. Drill pilot holes into existing frame through pre-drilled installation holes in the replacement window jambs.
5. Install screws in every pre-drilled hole and tighten all screws appropriately. Do not over-tighten; this will shift the window out of square, level or plumb.
6. On double hung operating windows, remove the band securing the jambs at the check rail and remove the lower sash.

Both Installs/Exterior View



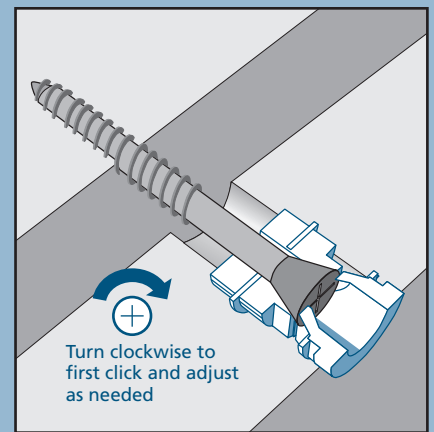
Verify square, level, & plumb

Both Installs/Interior View



7. On metal-clad 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.
8. If the replacement window is wider than 30", install shims at the header, lower the upper sash (on double-hungs), drill a pilot hole through the head and into the existing frame approximately 6" from each jamb and install screws in the header.

Jamb Jack



9. Remove all shims.

**Note!** If the replacement unit is a non-operating double-hung style picture or transom unit, the previously removed interior head trim piece exposes the pre-drilled installation holes.

10. Clad double-hung operating units are supplied with color-matched vinyl caps. For wood windows, natural wood caps are available through dealers. Install caps into the installation holes as desired.

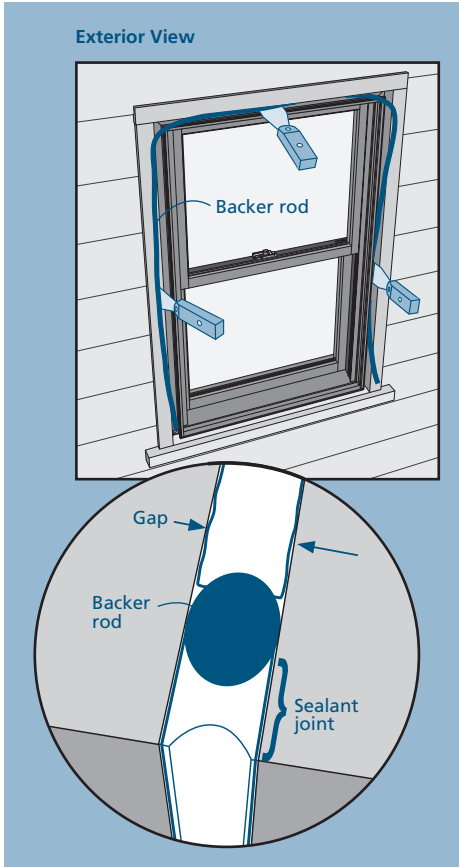
**3** INSTALL WINDOW & SEAL - CONTINUED

**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 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.

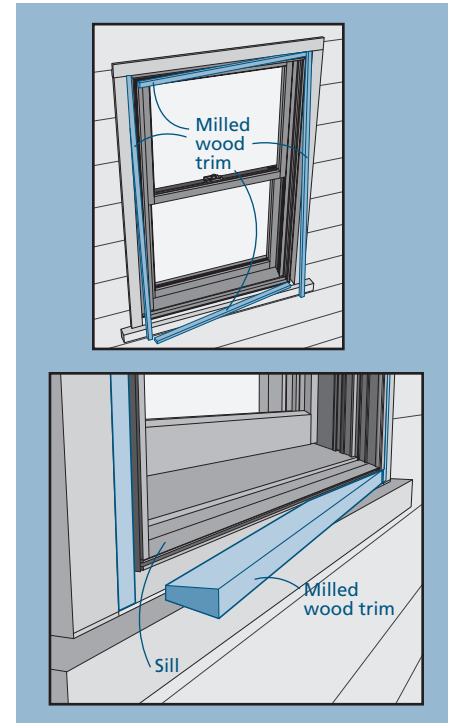


**Exterior Installation:**

On metal clad double-hung and casement windows, mill four wood trim pieces (supplied by installer) to fit on the exterior front between replacement window frame and existing frame. Tack into place.

**Interior Installation:**

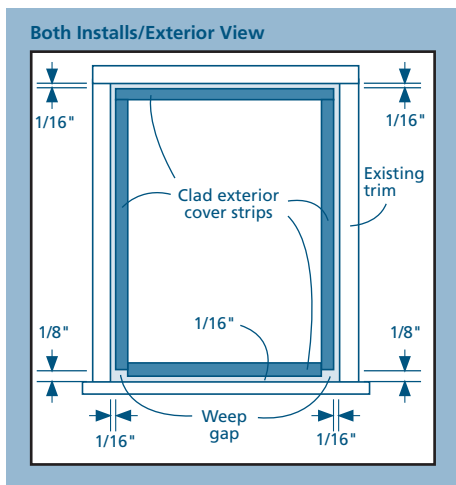
- Mill a sill trim piece (supplied by installer) to fit under the exterior sill.
- Reuse previously removed interior trim, or mill new pieces to cover interior joint between replacement window frame and existing frame. Tack into place.



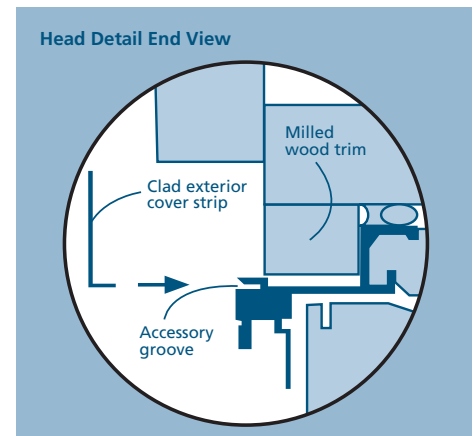
**4** COMPLETE INSTALLATION

**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 exterior clad strips. If the gap between the existing frame and the new casement, awning, and casement picture/transom pocket window is less than 3/8" at the head and sides, use backer rod and sealant at these locations.



- a. Measure the distance between the existing side jamb trim pieces and subtract 1/8". Cut the head cladding strip to length. Center and tap the head strip into the accessory groove.
- b. Cut two side jamb cladding strips, leaving a 1/8" weep gap at the sill. Tap the strips into the accessory groove.
- c. Cut the sill cladding strip (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.





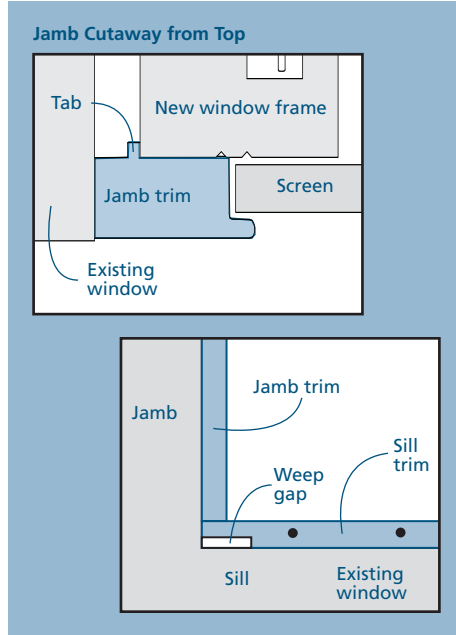
**4 COMPLETE INSTALLATION - CONTINUED**

2. On primed wood double-hung, picture and transom, cut and apply exterior wood strips as follows.

a. Cut the wood head trim to fit between the existing side jamb trim pieces, and below the head trim. Center the head trim on the window frame, aligning the tab on the trim with the outside edge of the window frame as shown. This is required for proper fit of the screen. Attach with galvanized finish nails.

b. Cut the wood sill trim to fit between the existing side jamb trim. Notch both ends to allow for a 1/8" weep gap. The sill portion of the strip may need to be ripped to match the angle of the existing wood sill. Apply a bead of sealant along the front edge of the pocket window's sill. Position the trim in place and attach with galvanized finish nails.

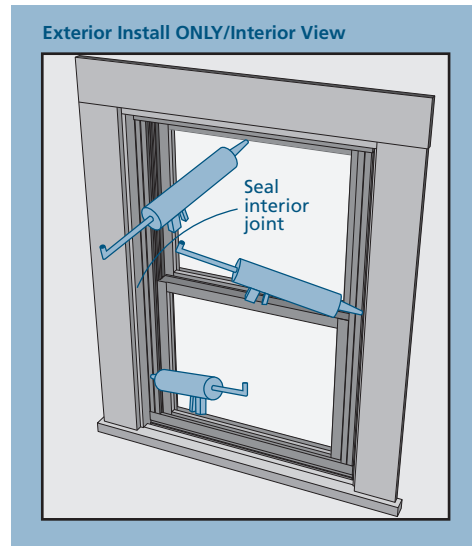
c. Cut two wood side jamb trim pieces to fit between the head trim and the sill trim. Attach with galvanized finish nails.



**Exterior Installation:**

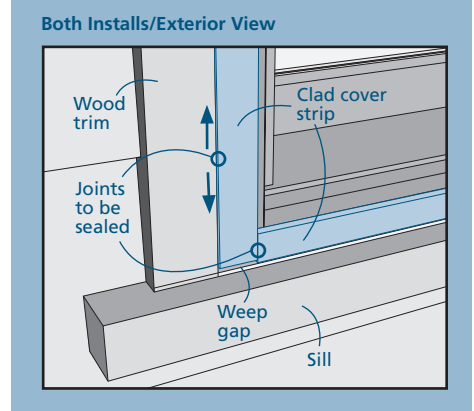
Seal the interior joint between the existing frame and the replacement window with 100% polyurethane sealant.

**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.



**AFTER INSTALLATION**

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

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

Thank you for choosing

