

# ShadeTree® Canopy Systems Assembly Instructions

Using *ShadeTree® Aluminum Overhead Tracks*  
supported by a aluminum vertical support structure.

## The Capri & Capri II



Dear Customer:

Thank you for purchasing our **ShadeTree® Canopy System**. We trust these assembly instructions will be satisfactory for your installation. If you have any questions, please feel free to call 1-800-894-3801.

And here's a special offer we'd like to make to you: Send us a photo of your new ShadeTree® installation and we will send you **\$50** if we use your photo in our advertising materials. Before and after pictures will receive an additional \$50. A deck or patio that is nicely furnished helps us communicate to prospective customers how nice a ShadeTree® patio can be.

We hope you enjoy your new ShadeTree® patio canopies.

Sincerely,

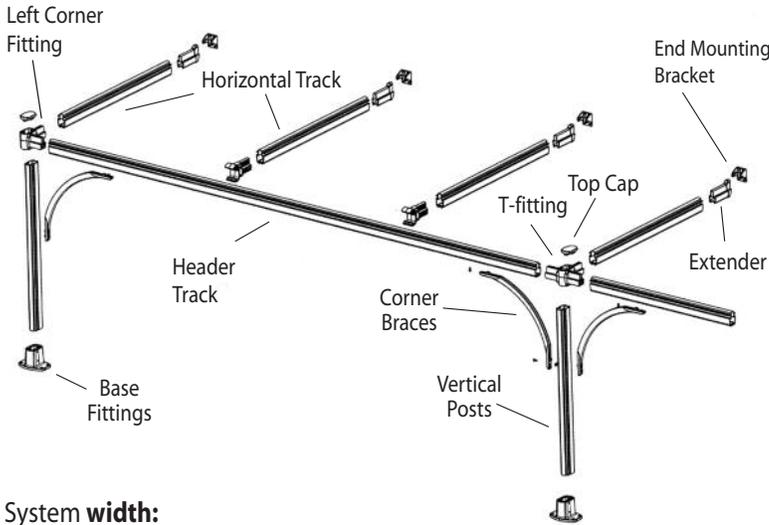
Colin LeVeque, President  
ShadeTree Cool Living, LLC.

**ShadeTree®**  
Retractable Patio & Deck Canopies

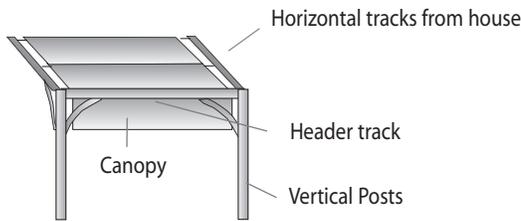


### overhead tracks and **aluminum** support structure

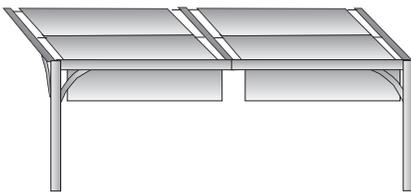
For the **Capri I** these instructions assume one end of the tracks will be attached to the house and the other to a rugged ShadeTree® aluminum vertical support system made from the same heavy-gauge powder-coated aluminum materials as the overhead tracks. For the **Capri II**, both ends will be attached to aluminum vertical support structures, making it a free-standing unit. Assembly is quick and easy . . . the base fittings attach to your deck, patio or railing.



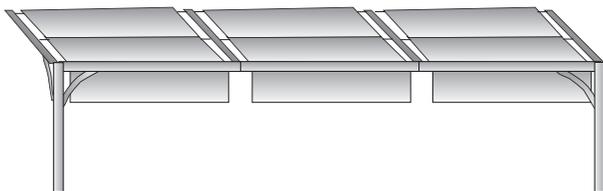
#### System **width:**



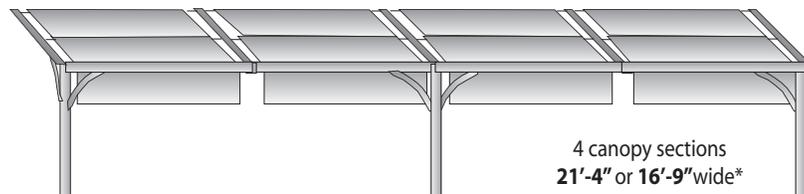
1 canopy section  
5'-4" or 4'-2-1/4" wide\*



2 canopy sections  
10'-8" or 8'-4-1/2" wide\*



3 canopy sections  
16' or 12'-6-3/4" wide\*



4 canopy sections  
21'-4" or 16'-9" wide\*

\* center to center of outside tracks. Please allow an additional 3" outside the centers of the two outermost tracks to accommodate mounting hardware and base fittings

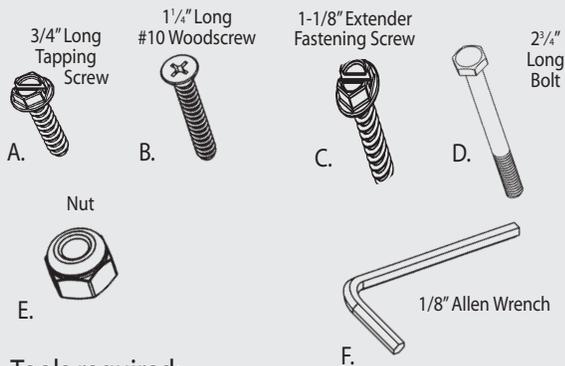
### Complete **Aluminum** System

(supported by an **aluminum** frame)

All systems are custom-made and shipped with the following kits and parts included. This chart is intended as a check-off list only.

Parts for The <b>Capri</b> System <i>(utilizing aluminum vertical support system)</i>	
	<b>Quantity</b>
ShadeTree® Canopies	1
Right Corner	1
Left Corner	1
Projection Track	2
Vertical Posts	2
Header Tracks	1
<hr/>	
ShadeTree® Canopies	2
Right Corner	1
Left Corner	1
Projection Track	3
Vertical Posts	2
Header Track	1
T-fitting Kit	1
<hr/>	
ShadeTree® Canopies	3
Left Corner	1
Right Corner	1
Mid Beam	2
Projection Track	4
Vertical Posts	2
Header Track	1
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ShadeTree® Canopies	4
Right Corner	1
Left Corner	1
Middle Post Kit	1
Projection Track	5
Vertical Posts	3
Header Track	2
Mid Beam Fitting	2

**Fasteners & hardware provided:**



**Tools required:**

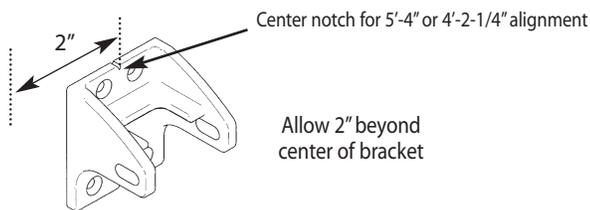
- |                         |                      |
|-------------------------|----------------------|
| 1. Phillips screwdriver | 6. bubble-type level |
| 2. hand drill           | 7. tape measure      |
| 3. 3/16" drill bit      | 8. hacksaw           |
| 4. 1/8" drill bit       | 9. 8' ladder         |
| 5. pencil               |                      |

**NOTE:** You'll find a second pair of hands (to hold parts as the unit goes up) to be very helpful in erecting your aluminum system.

**Step 1 Attach End Mounting Brackets to house**

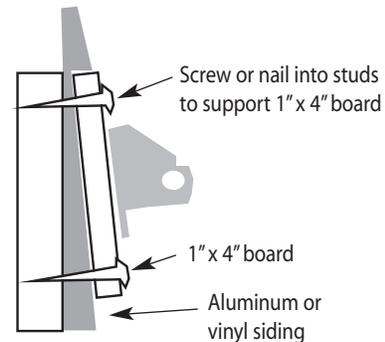
Mark the center location for each *End Mounting Bracket* on the house. The marks should be placed according to your specific CAD provided with your order. Be sure to allow approximately 2" on the outside of each outermost mark for inserting bolts into the brackets.

Mount the *End Mounting Brackets* on each center mark, using the center notch as a guide. The *Brackets* should be mounted so the slanting edge of the bracket is to the top (as in illustration). Be sure to mount the brackets level with each other. Drill four pilot holes with a 1/8" drill bit. Fasten the *Bracket* with four 1-1/4" #10 Wood Screws. (B) ... any other type of screws (such as masonry screws for brick or stone) can be purchased from your hardware store. The *Bracket* can be used as its own template for marking pilot holes.



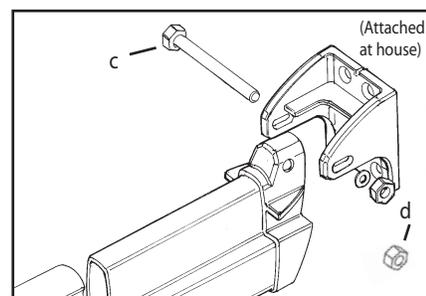
When mounting to house, brackets must be attached to well-secured wood, brick or stone.

- If mounting to a house with wood siding, or to wood trim, use the 1-1/4" long #10 Wood Screws (B) provided.
- If mounting to a masonry wall (brick or stone) concrete fastening screws must be used. Consult your hardware store for the best fastener for your situation.
- If attaching to stucco, aluminum, or vinyl siding, the screws must make contact with wood. On two story houses, this can usually be done in the area of the second floor joists. When no wood can be found to carry the canopy load, it is recommended to attach a 1" x 4" board to the home (see illustration below) ... horizontally at the height desired for the canopy. The board can then be secured by screws into each stud. On aluminum or vinyl siding, tighten the bottom screws only enough to hold board snugly. Over-tightening can compress the siding. The board can be painted or stained to match the siding.



**Step 2 Attach Extenders**

Attach an *Extender* to each of the *End Mounting Brackets* that are mounted on the house, using the 2-3/4" bolts (C) and nuts (D) provided. Be sure the top of the *Extender* is up (as shown). Loosely hand-tighten the nuts.



## Step 3 Pre-assemble Tracks to Posts

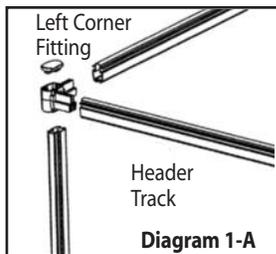
The goal of this step is to establish the height of the vertical *Post*. Temporarily assemble the *Base Fitting*, *Post*, *Left Corner Fitting* and the *Track* as shown below. Using a level, move the *Left Corner Fitting* up or down on the *Post* until the *Track* is level. Tighten the set screws of the *Left Corner Fitting*. With a pencil, mark on the post along the top of the *Corner Fitting* the location to cut excess post material. Remove the *Post* and cut the excess material with a hacksaw. The *Post* should be cut flush with the top of the *Left Corner Fitting*. Repeat this procedure for all posts.

For the **Capri II** follow the above instructions minus the extender on both sides of the track.



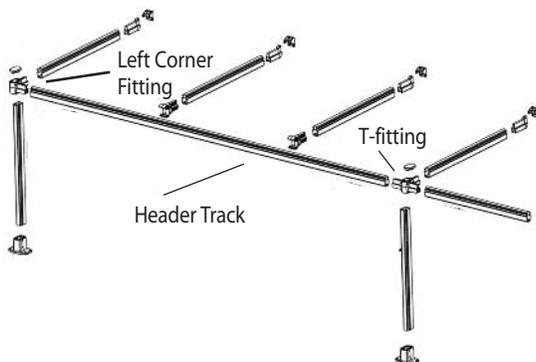
## Step 4 Assemble Header Track

Referring to diagram 1-A (below) follow steps 1 through 4 to attach *Corner Braces* and *Fittings*:

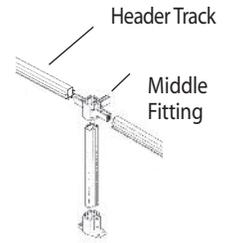


1. Slide *T-fitting* onto *Header Track*. Center the *T-fitting* on the *Header Track* and tighten both set screws.
3. Attach *Left and Right Corner Fittings*.
4. Slide the *Header Track* into *Corner Braces and Fittings*.

The image below refers to systems with two or three sections. The *T-fitting* is used between two sections of canopies to attach the *Projection Track* to the *Header Track* (positioned on centerline of *Header Track*.)



**Note:** A *Middle Fitting* is used in aluminum support systems of four or more sections and connects support *Posts* to *Projection Tracks* and *Header Tracks*. Middle post will require two corner braces as do left and right posts.

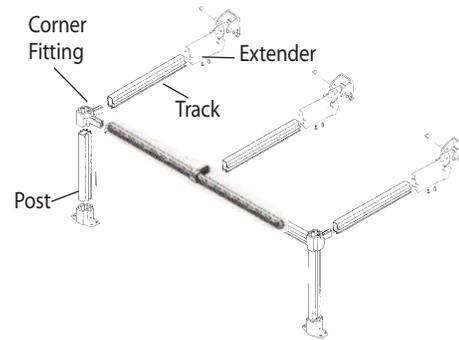


## Step 5 Assembly of Tracks to Posts

Insert the left *Extender* into one end of the track. Do not yet fasten with screws. Swing the opposite end of the track up and insert the *Corner Fitting*.

Repeat this step for every track.

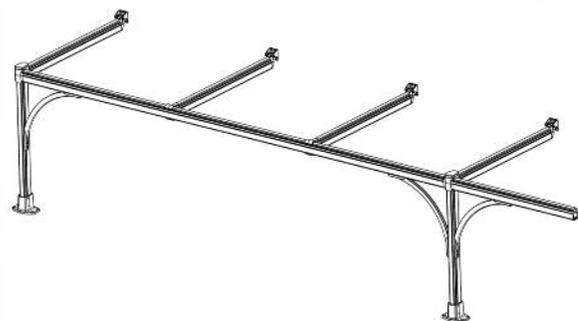
\* For the **Capri II**, assemble both header tracks.



## Step 6 Installing Corner Braces

Each post requires two *Corner Braces* positioned as shown in diagram. The *Corner Brace* is simply positioned in the appropriate corner with the bolt and locking nut insert into the corresponding groove of track. The nut is self locking in the track and tightening the bolt will draw up the locking nut and secure the *Corner Brace* into position. Repeat this procedure for all *Corner Brace* positions.

\* For the **Capri II**, assemble both header tracks.



**Step 6 Align Posts and Fasten** to deck or patio

It is important that your ShadeTree® structure be built on a anchored and level surface. One option is to pour concrete footers for the vertical posts. For the greatest precision, footers should be checked with a level.

Using a level, position the left post until it is vertical. Also ensure the track is square with the house. Attach the *Base Fitting* to the deck or patio. If mounting on a wood or vinyl surface, use the 1-1/4" #10 Wood Screws provided (B) . If mounting on a concrete slab or stepping stones, use masonry screws. You may want to consult your hardware store for the best fasteners and drill bit for your situation.

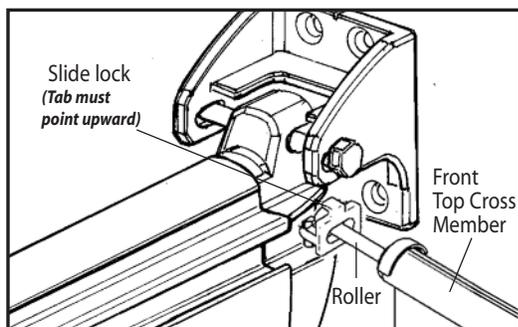
On the underside of the track at the left corner, insert and tighten two 3/4" Tapping Screws (A). Return to the *Extender* end of the tracks, insert and tighten two 3/4" Tapping Screws (A) in the holes provided on the bottom of the track.

Repeat this at all *Corner* and *Middle Fittings*.

Included with your ShadeTree® product are *Top Caps*. Press one *Top Cap* into the top of each *Corner, Middle* or *Right Corner Fitting*.

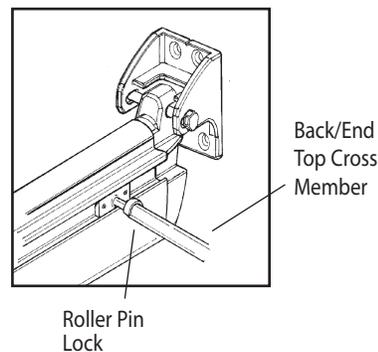
**Step 7 Installing the Canopies**

You can now insert the canopies, starting at the end of the tracks closest to the house. Insert the *Rollers* of the front *Cross Member* first. The front *Cross Member* is the one that has a *Slide Lock* on the roller at each end. **When inserting, ensure the lock tab is pointing up as shown here.** Be sure the canopy is oriented so the *Fabric Clamp* is facing up as shown. Continue inserting the remaining *Rollers* until the entire canopy is up. Install the remaining canopies using the same procedure.



**Step 8 Locking** the end of the canopy

A *Roller Pin Lock* is provided to hold the *Cross Member* nearest the house in a fixed position. Locate the *Roller Pin Lock* in the track at the point where you want the canopy positioned. Once positioned, it can be secured with the set screw. Repeat on each track. (On masonry houses, it is recommended to leave a few inches between the canopy and the house to prevent scuffing of the canvas during windy weather).

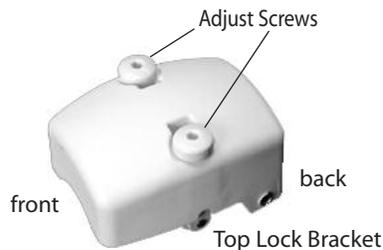


**Step 9 Installing the Top Lock Brackets**

Pull each canopy section out to the position where you want it to end. Place a *Top Lock Bracket* on the top of the track. Tighten the set screws with the Allen wrench provided (F) ... making sure the *Top Lock Brackets* are completely pushed down on the track before tightening.

Test the snap-in *Top Lock Bracket* and tighten or loosen the adjusting screws as required for the desired tension. Turn the adjust screw clockwise for greater tension; turn counter clockwise for less tension. Repeat this step on each track.

Pull each canopy back to the fully retracted position. Place another *Top Lock Bracket* on each track at this point to hold the canopies in retracted position. Tighten the set screws.



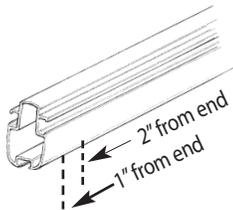
**Note:** Top Lock Bracket should face away from the house for the retracted position and to the house for the extended position.

**NOTE:** The locking system is designed to release the canopies in high winds to protect the canopies. The adjusting screws can be used to adjust the tension. Do not over-tighten as this could increase the chance for canopy damage in high winds.

### Step 10 Shortening Track Length (optional)

If your application requires track lengths in a shorter increment than provided, you can cut the track using a hacksaw or miter saw. Ensure that the cut is square. **Cut the excess length from the end of the track that will be mounted to the Corner Fitting. Do not cut notched end. Notched end allows for extender to properly fit into projection beam.**

Once the cut has been made, two 5/16" mounting holes must be redrilled into the bottom of the track on the end that was cut. Refer to the figure below for the location.



If you have shortened the track length, you will also need to shorten the canopy length, please execute the next step (Step 12).

### Step 11 Adjusting the Handle Height (optional)

Each canopy has the handle overhang approximately 18" from the tracks. This drop handle is for opening and closing the canopies, but it is also important for catching the wind to cause the wind-release mechanism to activate. Therefore, we encourage you NOT to shorten it. However, if you must have less than an 18" overhang, follow the instructions below for shortening the handle height.

1. Remove the screws in the handle and open the handle the entire width.
2. Cut the fabric to the desired length.
3. Carefully close the handle and re-insert the screws provided – do not overtighten.
4. Reinstall the top caps in the end of the handle.

### Step 12 Shortening Canopy Length (optional)

Lay the canopy on a flat clean surface. The extra fabric length should be removed from the back end of the canopy. This is the end opposite the handle. Remove the *Roller Sleeve* assemblies at both ends of the back canopy *Cross Member*. To do this, first fully extend the *Roller*, then push down on the locking tab and pull *Roller Sleeve* outward (Fig. 2A).



Remove the *Fabric Clamp*. To do this, insert a flat head screw driver between the canopy fabric and the *Fabric Clamp*. Pry upward to release the *Fabric Clamp* (Fig. 2B).



From the back end of the canopy, measure the same distance that was taken off the track length. Make a mark at this distance on both outside edges of the fabric (Fig. 2C).



Place the *Bottom Cross Member* (aluminum) underneath the canopy, centering it on the two marks. Position the *Bottom Cross Member* so the punched square holes at the ends are facing downward. Holding the *Bottom Cross Member* in this position, reassemble the *Fabric Clamp* by snapping the *Fabric Clamp* in place at both ends and pressing down, working toward the center (Fig. 2D).



Insert the *Roller Sleeve* assemblies back into the *Bottom Cross Member*, ensuring that the locking tab engages the corresponding punched square hole in the *Bottom Cross Member* (Fig. 2E).



Measure the canopies to ensure the desired length is correct before trimming off excess canopy material. Remove the canopies and place on a flat, clean surface. To remove the excess canopy material, use the edge of the *Fabric Clamp* as a guide when cutting with a sharp utility knife (Fig. 2F).

**Care and cleaning** of your ShadeTree® Canopies

1. **ShadeTree® tracks** should be cleaned regularly to keep debris and dirt from accumulating and interfering with the rollers. Simply use a mild detergent with a small soft brush, such as a toothbrush, and gently wipe or brush along the inside of the tracks. To maintain a smoothly operating system, apply a paste car wax such as Kit™ or Turtlewax™ to the roller tracks. Allow the wax to dry then wipe off with a clean, soft cloth. **Note: Do NOT use oil or any wet lubricant, such as WD-40, on the tracks as it would attract more dirt.** For ultimate performance, use **ShadeTree® EasyRider Track Lubricant**.
2. **Fabric** should be cleaned regularly before substances such as dirt, roof particles, etc., are allowed to accumulate on and become embedded in the fabric. The fabric can be cleaned without being removed from the cross members. Simply brush off any loose dirt, roof particles, etc.; hose down and clean with a mild natural soap in lukewarm water (no more than 100° F.) Rinse thoroughly to remove soap. **DO NOT USE DETERGENTS!** For ultimate performance, use **ShadeTree® Canopy Cleaner Mold & Mildew Stain Remover**.
3. For stubborn stains soak the fabric for approximately 20 minutes in a solution of no more than 1/4 cup (2 oz.) natural soap per gallon of water at approximately 100° F. Rinse thoroughly in cold water to remove all of the soap. Note: Excessive soaking in bleach can deteriorate sewing threads. This method of cleaning may remove part of the water repellency and the fabric should receive an application of an air-curing water-repellent treatment, such as APCO, UNISEAL, SUNSEAL or similar products, if water repellency is a factor. For ultimate performance, use **ShadeTree® Canopy Cleaner Mold & Mildew Stain Remover** and **ShadeTree® Water Repellent**.
4. When washing or cleaning, **DO NOT SUBJECT TO EXCESSIVE HEAT** as the fabric will shrink. **DO NOT STEAM PRESS OR DRY IN ELECTRIC OR GAS DRYERS**, but allow to air dry.
5. In cases where canopies are taken down & stored, they should be cleaned and allowed to air dry, before being stored in a dry, well ventilated area.

How to **remove** ShadeTree® Canopies for **end-of season storage**:

1. Remove the **Top Lock Brackets** at the “retracted” end of each track (see step 9.)



- 2 Remove the **Roller Pin Lock** which holds the last Cross Member in a fixed position (see step 8.)



3. Then simply roll the **Cross Members** out of the “retracted” end of the track. The tracks can remain up year-round.
4. **If a canopy is dirty** and requires washing before storage, simply spread the canopy on a driveway or other flat surface. Wash, using a broom and bucket of warm water and a mild soap, such as Ivory Snow.

Be sure to rinse well by hosing with a clear water. Allow to air-dry completely in the sun before rolling canopies up for storage. **(Do not store wet canopies!)**

Here's a chance to earn **\$50!**

We regularly use pictures in our advertising materials. If you send us reproducible pictures of your new ShadeTree® canopy installation, and we use them in any of our advertising, we will send you \$50. Interesting before-and-after pictures will receive an additional \$50. Of course, attractive landscaping and patio furniture will be a factor in selecting pictures to be used. Architects, builders and installers will receive credit mentions in the advertising.