CARCare™
Auto Maintenance Software

Latest Changes: Version 2.1

Introduction

This document provides a listing of new functional features offered in CARCare. It will also offer some suggestions in terms of using new features of the product.

If you are updating your CARCare installation from 2.0 or earlier, you will want to review this document so that you understand the latest features and how to use them.

If you have a version of CARCare that is very old, it is essential that you incrementally update your software in a special way, one step at a time. Be sure to read the page entitled "**Check Your Version**" to ensure that you update your software correctly.

If you have any questions regarding updating your system or using the latest features, please send your questions to support@carcaresoftware.com. We will be glad to assist you.

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Quick Overview of the Update Process

1) Perform steps "a" through "d" below BEFORE updating your CARCare for Windows software:

   a) Review the information in this guide.

   b) Define the **Tag No** field for each of your vehicles. CARCare will now use this field for reporting purposes.

   c) Define the **Order No** field for each of your current maintenance records. This field is important to organize your data, and to ensure correct data relationships.

      i) *If you prefer, you can defer this step until after you have upgraded your CARCare for Windows software, and use the Database Repair process to automatically assign missing order numbers for you.*

   d) If you use **CARCare Mobile Edition**, run a sync using your current software <u>before</u> proceeding.

Do <u>NOT</u> Uninstall Your Prior Version

Install the latest version over what is already installed.

Do <u>not</u> make assumptions based on your knowledge and/or use of other software. Follow the instructions exactly as presented. If there are any special steps to take, those steps will be covered.

If you have questions, or if you encounter any difficulties, send us your questions or concerns via email to support@carcaresoftware.com.

We will be glad to assist you.

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Preparation Before Updating

Order Numbers

If you have not already done so, you will need to enter unique **Order No** values for each maintenance record stored in your CARCare database. This is important so that CARCare properly recognizes the Parts and Tasks lines that relate to each single maintenance record.

If you prefer, you can have CARCare automatically assign missing order numbers during a database repair. Use the **Options** | **Preferences...** menu option first to set your optional prefix, and the starting point in the numbering process. Order numbers MUST be unique.

Tag Numbers

If you have not already done so, you will need to enter a **Tag No** or license plate number for each of your vehicles. A Tag No value must be unique. The Tag No field now drives many of the vehicle related reports in CARCare.

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Check Your Current Version

Start CARCare and use the **Help** | **About…** menu option to view and make a note of your current version. Close CARCare.

If you have v2.0.079 or later, you're all ready to go. Go ahead and download and install the latest release of CARCare. Then go to the next page.

CARCare Website – Download Page

If your current version is prior to v2.0.079, go to the Download page of the CARCare Website (pictured above), and click the red link entitled **Click Here for Further Instructions**. This will open a new window that will explain the next steps to take to incrementally update your CARCare software. Failure to follow these steps will result in difficulties!

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Start CARCare

When you first open CARCare v2.1 from an earlier version, a database repair will take place. This is normal. Your prior data will be converted to the latest format.

Note that you may need to re-adjust your prior column settings, depending upon the way in which they were previously defined.

The system of Reminders and Recurring Tasks in CARCare has changed significantly in v2.1. You will now have much more flexibility in terms of setting up and using Recurring Tasks and Task Templates.

To continue, please review the remaining sections in this document.

Be sure to review the section entitled **2. New Recurring Task and Reminder System** for additional information concerning new and improved reminder functionality.

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1. Latest Changes

Outline Format for Maintenance and Accessory Tabs

This feature enables you to take a quick look at the Task and Parts entries associated with a Maintenance record, without having to actually open the maintenance window. A button will enable you to toggle between the standard "List" mode, and the new "Outline" mode. Column sorting is still supported in either mode. Change to List mode to gain full access to the pop-up context menus.

Events Window

This feature was designed to enable you to record data related to competitive events that you participate in with your vehicle. This feature will be of interest to car enthusiasts that are active in motor sport events, such as SCCA® Autocross or bracket racing. If you display your vehicle in events such as parades or car shows, you can also maintain a history of each such event.

Ownership History

Primarily for car enthusiasts, this feature enables you to maintain the ownership history for a vehicle. This feature will be of interest to owners of vintage or custom cars, where it is important to document the history of ownership for a vehicle.

Vehicle Journal

The vehicle Journal feature is designed to maintain a running list of dated entries of any miscellaneous comments or notes about each of your vehicles. This feature is primarily intended for collectors or other auto enthusiasts that need the means of recording these types of notes for reference at a later time.

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Enhancement – Vehicle Pane

Any vehicles that are flagged "inactive" will now be listed in light gray, so that you can more easily identify inactive vehicles versus active vehicles.

Enhancement – CSV Export Function

The export feature in CARCare offers additional flexibility. You can select individual data fields and you can specify a date range for those records that include a date field.

Enhancement – Maintenance Records

The maintenance records in CARCare now enable you to record individual labor lines, to account for specific types of service performed. The labor cost is now captured for each labor line entered, and automatically sub-totaled.

Enhancement – Recurring Tasks and Templates

Recurring Tasks have been modified to offer additional functionality. More than one recurring task may be completed within the context of one maintenance record for PM type reminders. Each completed reminder will be rescheduled appropriately based on each individual recurring task defined.

Enhancement – Preferences Settings

You can now define the top two lines of your report headings. These lines are defined on the **Reports** tab. The **Messages** tab enables you to adjust gauge sensitivity so that all gauge movement is consistent across all displayed gauges.

Enhancement – Date Adjustments

The popup calendar buttons are still present in CARCare, to make selecting a date easier without having to type. However, for those of you that prefer another means of quickly adjusting a date value, you may now use your **[Up]** and **[Down]** cursor keys to increase and decrease date values.

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Enhancement – Main Window Refresh

If you're using CARCare in a networked environment, you may not immediately see data changes made by other users, unless you open and save a record or perform some other action. You may now press your **[F5]** key on your keyboard to immediately refresh your data at any time.

Cosmetic – Dialog Appearance

A new **Gradient** theme is now available under the Options | Preferences... dialog, to give you an alternative to the Standard or Brushed effect.

Cosmetic – Attachments vs. Images

The term "Attachment" is now more prominent concerning various types of content that you can attach to a Vehicle record, or a Maintenance record. You can sill attach a photo image, such as a "bmp" or "jpg" file. However, there is now clearer labeling concerning other valid file types such as; "pdf", "htm", "doc", "xls", etc.

Enhancement - Fuel Economy Reports

Added additional average per fill calculations to the "Fuel Economy Statistics by Vehicle" report (formerly entitled Fuel Economy Summary). Also added high/low values for distance, consumption, and cost columns, and an overall average cost per Gal/Litre.

Enhancement - Report Viewer

When the Report Viewer window is initially opened, it will automatically report on the vehicle that was last selected on the main window, and will automatically select the Report Type based on the topic tab selected on the main window.

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Enhancement - Program Start-Up

CARCare will now remember the topic tab selected when you last exited the program, and will select that tab when you restart.

Enhancement - Premium Edition License

A CARCare Premium Edition license will no longer impose a 200 asset limit. The asset count is now unlimited. There is currently no additional charge for this change.

System Change - Installation Data Path

As of Build #92, CARCare will now install all data related files into the C:\Users\Public\CARCare folder, regardless of the Windows version being used. This will occur during a new installation. This includes the location of your database file. Following is a list of the new default path settings:

- Database File - C:\Users\Public\CARCare
- XML Report Files - C:\Users\Public\CARCare\Reports
- User Image Files - C:\Users\Public\CARCare\Images
- Database Backups - C:\Users\Public\CARCare\Backup

Note the User Image File folder setting will be the default folder for all attachments, not only image files, such as "bmp" and "jpg" files. Other file types, such as "pdf" and "doc" files should be stored there as well.

If you were running an earlier release of CARCare, prior to build #92, the software will not attempt to more your data for you. This is because, depending upon the operating system, the software cannot positively determine the actual location or your database file. Therefore, you can manually move your database file to the new C:\Users\Public\CARCare folder if you choose to do so. Additional reference documentation is available on the Support page of the CARCare Website.

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2. New Recurring Task and Reminder System

Prior Approach

In prior versions of CARCare, a Recurring Task would result in one (1) single reminder that, when completed, would issue a single maintenance record. The Work Summary text needed to match the reminder description text.

The picture below illustrates this prior approach.
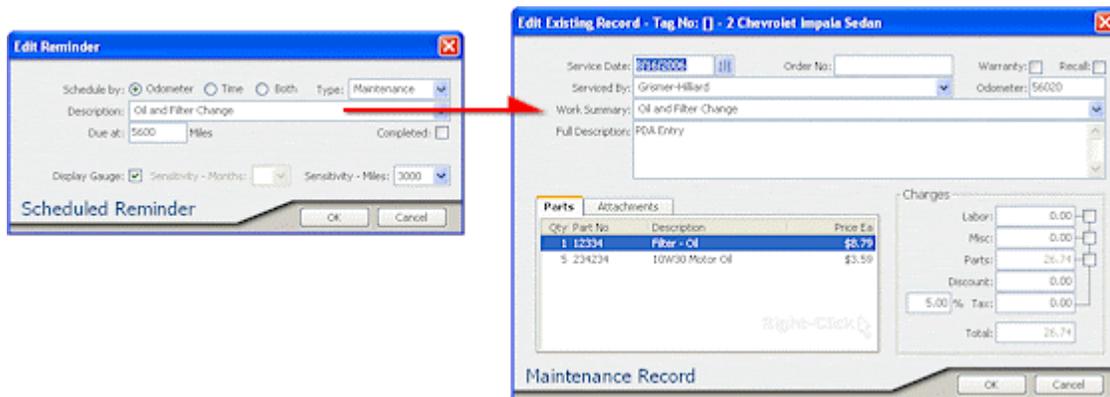
Prior One-to-One Relationship of a Recurring Task/Reminder to a Maintenance Record

This approach, although functional, did not support different types of labor activities on one maintenance record, nor did it enable you to complete multiple reminders within the context of one (1) maintenance record.

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New Approach

In version 2.1 of CARCare, each individual type of service activity that is required should be defined using a separate Recurring Task record. This rule also applies if you have manually scheduled your reminders.

When PM (preventive maintenance) type reminders come due, any number of PM type reminders can be selected for inclusion on a <u>single</u> maintenance record. A new Reminders window enables you to use this new multi-select functionality when you choose to complete PM type reminders.
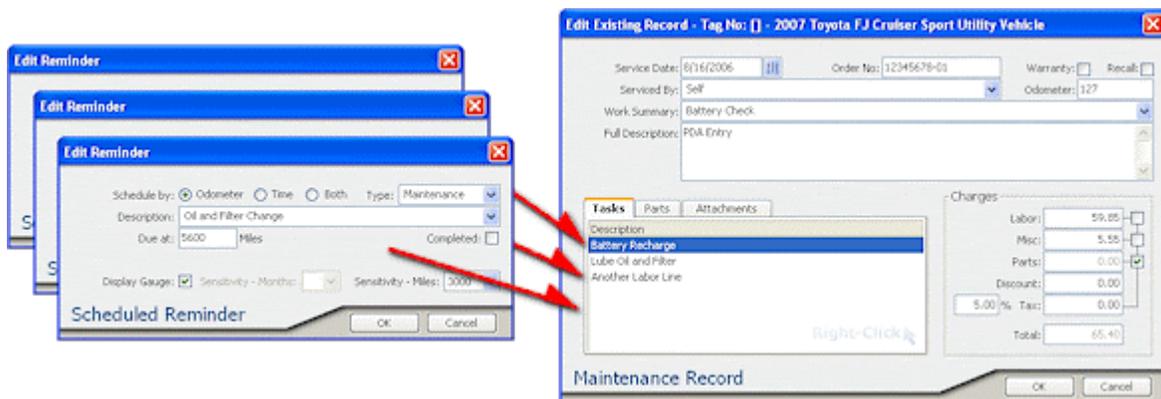
New Approach – Complete Multiple Reminders on a Single Maintenance Record

This new approach optimizes the use of Task Templates. You can now define any number of Recurring Tasks on a Template, each with a different interval. The reminders that are created by these Recurring Tasks will each come due individually, based on each specified interval. You can also copy/paste Templates, to make it easy to setup a new Template based on the copied Template. You can then make minor adjustments to accommodate a different vehicle type.

The functionality that supports selecting multiple reminders for completion is only in effect for PM type Recurring Tasks and Reminders. Any Recurring Task or Reminder that has its Type value set to Maintenance is considered a PM type.

The Work Summary field on a maintenance record will default to a value of "Scheduled PM", and may now be edited to a value of your choice.

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New Approach (*continued…*)

Recurring Tasks and Reminders that are non-PM types (e.g. Registration Renewals, Insurance Renewals, etc.) must still be completed individually.

In version 2.1 of CARCare, a new Reminder Completion window is featured. You should always complete reminders that are currently due using this window.

New Reminder Completion Window – Complete Multiple PM Reminders at Once

To select multiple PM type reminders, hold your [**Ctrl**] key on your keyboard while clicking on the PM type reminders that you want to complete on your new maintenance record. Once you click the **Complete Selected Reminders** button, a new maintenance record will appear, and will include all selected reminders as Task lines on your maintenance record. Simply double-click on each Task line to enter the actual cost for each task record. Costs are subtotaled automatically.

You can only multi-select PM type reminders, and your selection(s) must be within the context of one (1) vehicle at a time. In the picture above, two (2) reminders are selected.

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New Approach (*continued...*)

When the **Complete Selected Reminders** button is clicked, these two reminders will be added to the new maintenance record as individual Task lines.

Reminders that appear in **red** on this window are overdue.

Note that if you enter a Task line on your maintenance record to satisfy a Reminder that is pending but not yet due, be sure that the description on the Task line is an *exact match* of the description on the pending Reminder that you want to complete. This will automatically reschedule the next Reminder.

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3. More On Recurring Tasks & Reminders

Reminders that are Initially "Locked"

If no service history exists for an activity, the reminder will remain locked at the point it is initially scheduled via its Recurring Task. This keeps the initial reminder fixed so that it does not continually drift into the future as vehicle usage increases and/or time passes.

If you need to reschedule an initial reminder that is locked, you will need to first manually delete it. Its Recurring Task will then reschedule the reminder based on current odometer and/or date.

If prior service history is present in your database, the reminder for that activity will <u>never</u> be considered "locked". It will be automatically rescheduled whenever necessary based on prior maintenance records.

Editing a Maintenance Record Date and/or Odometer

If you edit the Date and/or the Odometer value on a maintenance record, and that maintenance record contains Tasks that are setup as Recurring Tasks, your reminders for these tasks will be rescheduled based on the new date/odometer values on the maintenance record. Again, the rescheduling process will be based on the new Date and/or Odometer values that were entered.

Task Line Descriptions and Reminder Descriptions

In order for work recorded on a Task Line on a maintenance record to be associated with a Reminder, the two Descriptions must match. The system recognizes that a specific type of work was performed, by comparing the Task Line description to the Reminder description.