

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 have any questions regarding upgrading your system or using the latest features, please e-mail us at support@carcaresoftware.com. We will be glad to assist you.

Quick Overview of the Upgrade Process:

- 1) Perform steps "a" through "d" below BEFORE upgrading 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.
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 before proceeding.
- 2) Review the information in this guide and then install/upgrade your **CARCare for Windows** software on your PC. Refer to the next page for additional information that covers the upgrade process from previous versions.
- 3) If you use **CARCare Mobile Edition**, you can upgrade your PDA software once the CARCare for Windows has been completed. There is a separate Installation Guide on the CARCare Website for installing the Mobile Edition.

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IMPORTANT NOTES:

You **MUST** be running **CARCare Desktop Edition v2.0.079** in order to upgrade to version 2.1. If you have an earlier version, please use the list below to complete the preliminary steps you'll need to follow before installing CARCare for Windows v2.1.

- I. **Check Your Current Version**
 - A. Start CARCare and use the **Help | About...** menu option to view your current version. Close CARCare.

- II. **If Your Version is Prior to 1.4.056**
 - A. Install [1.4.056](#), Start CARCare to run a Database Repair, and Close
 - B. Install [2.0.079](#), Start CARCare to run a Database Repair, and Close
 - C. Install and Start the Latest Version

- III. **If Your Version is from 1.4.056 to 2.0.078**
 - A. Install [2.0.079](#), Start CARCare to run a Database Repair, and Close
 - B. Install and Start the Latest Version

- IV. **If Your Version is 2.0.079 or Later**
 - A. Install and Start the Latest Version

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. You will now have much more flexibility in terms of setting up and using Recurring Tasks and Task Templates. Please review the section entitled **New Recurring Task and Reminder System** for additional information.

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 recognize 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.

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 reports in CARCare.

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1. Latest Major Changes

NEW – 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.

NEW – 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.

NEW – 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.

NEW – 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.

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.

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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. The **[+]** / **[-]** keys near the number pad on your keyboard will work in a similar fashion. The **[+]** key will increase the date, and the **[-]** key will decrease the date value.

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.

Enhancement – Dialog Appearance:

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

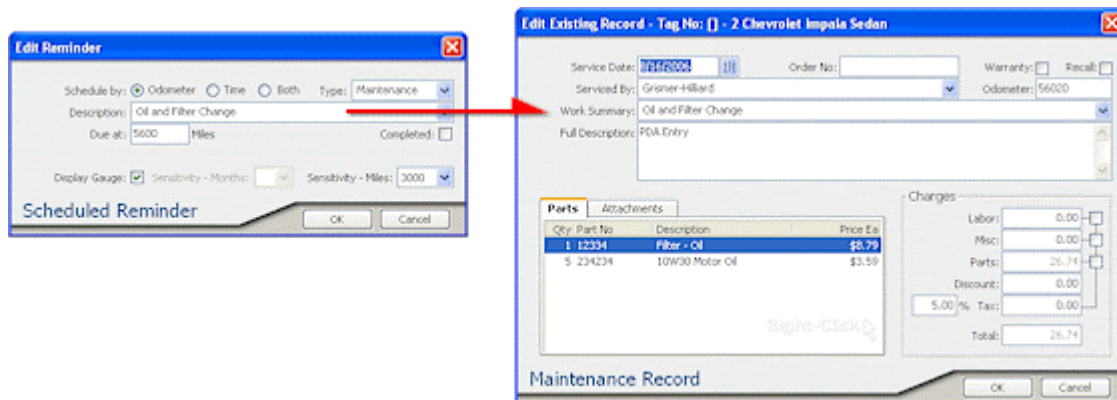
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2. New Recurring Task and Reminder System

Old 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

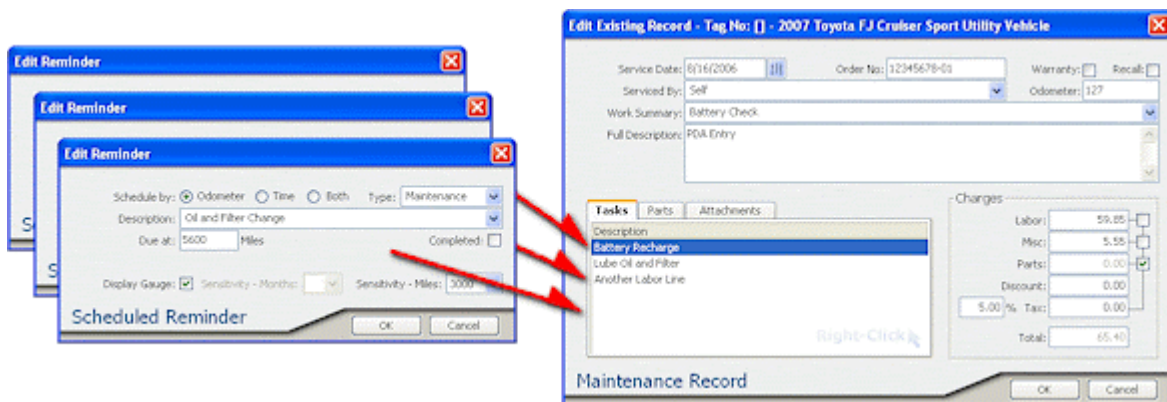
This approach, although functional, did not support different types of labor activities on one maintenance record, nor did it enable you to complete multiple reminders within the context of one maintenance record.

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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 single 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.

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

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New Approach *(continued...)*

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.

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 below, two (2) reminders are selected. When the **Complete Selected Reminders** button is clicked, these two reminders will be added to the new maintenance record as individual Task lines.



New Reminder Completion Window – Complete Multiple PM Reminders at Once

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. Additional Notes - Recurring Tasks and Reminders

Reminders that are Initially “Locked”

Specific types of service activities are identified by the descriptions found in the Task lines on your maintenance records.

If prior service history is present in your database, the reminder for that activity will never be considered “locked”. It will be rescheduled whenever necessary.

However, if no service history exists for an activity, the activity 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 manually delete it. Its Recurring Task will then reschedule the reminder based on current odometer and/or date.

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, using the Task Line description.