

HomeBudget

Anishu, Inc.

Family Sync – Quick Start Guide

Overview

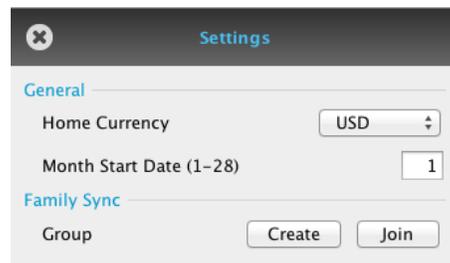
Family Sync is an advanced feature that allows a group of devices/computers within a family to exchange expense and income information, and work together within a single budget. Once setup, the devices/computers sync with each other automatically over the air. All devices/computers in a family that need to sync together form a *Group*. When you create a group, you will give it a *name* and a *password*. You will share the password with other members of your group to enable them to join the group and participate in the updates. The device that creates the group is the *primary device* and all other devices are *secondary*.

The family sync feature relies on having network connectivity either through the carrier data network (3G or Edge) or through a WiFi connection. When participating in family-sync, as a user interacts with the app, the changes made on one device are sent out as a series of updates to other devices in the group. The other devices apply the updates as they receive them.

Getting Started

Here are the steps to get started.

1. The Family Sync menu is accessed from the Settings screen/panel.



2. Identify the device in your family that will act as the primary device. From the primary device, access the Family Sync Menu and create a group. Name the Group appropriately.



At this point, do not enter any transactions till you add at least 1 secondary device to the group (step 3).

- From the secondary device, access the Family Sync Menu and Join the Group.



- Transfer initial data from the primary device to all secondary devices. For this, in the primary device, tap the menu item 'Send Initial Data' and in the secondary device(s), tap the menu item 'Receive Initial Data'. You need to receive the initial data immediately after sending (otherwise the data expires and you will need to send again).

This step ensures that all devices in the group start with the same initial state. **This is a required step, even if you are starting from scratch on primary and secondary devices.**



- After transferring initial data, close HomeBudget, and restart the app on both devices. At this point, any entries that you make on a device would be automatically synced among all devices within the group.

Additional Information

- After receiving and applying the updates, the device vibrates (iPhones only) and updates the current screen in most cases. You can also view the last sync time, and force sync anytime from the Family Sync menu.
- As changes are first applied locally (and then on the other devices), the transaction entries may not appear in the same order on different devices.
- All devices in the group need to be running the same version of HomeBudget. When one of the devices is upgraded, other devices are prompted to upgrade.
- When family sync is in effect, the recurring expense/income transactions are generated on the device that created the original entry and then propagated to other devices in the group. If do not see a

recurring expense/income generated on a due date, it is good to check if the device that created the entry is active in the group, and open HomeBudget on the device (that created the entry).

- Receipt images and uploaded icons are not synced between the devices. You can manually upload the icons on all devices.
- Tasks related to generating budgets at the end of budget cycles are carried out on the primary and then propagated to all secondary devices.

Feedback

If you have comments/suggestions on Family Sync or any other HomeBudget feature, we would be happy to hear from you. Please send your comments/suggestions to: support@anishu.com

Important Information

Please note that while Family Sync is offered as a free service at this point, we may require a low yearly fee in the future to cover our costs. Also, Anishu, Inc. reserves the right to stop offering this service anytime. Note that you can stop using Family Sync service anytime, and continue using HomeBudget in stand-alone mode. By signing up, you agree to the terms and conditions of the service.

Frequently Asked Questions (FAQ)

I have Family Sync set up. But the sync feature doesn't seem to be working (or only working partially) and devices show inconsistent numbers.

These issues are usually the result of not transferring initial data successfully. Please transfer initial data from the primary device to all secondary devices one more time. This will bring all devices/computer to the same initial state. After this, the devices will start syncing together.

I just replaced my iPhone (iPad). How do I make my new iPhone (or iPhone 4) the primary device?

Basically, you need to delete the group and recreate it from the new primary device. Here are the general steps to handle replacement of primary and/or secondary:

1. If you still have the old primary, delete the group from it. This will allow you to use the same group name in the new primary. If not, it is okay; you will need to use a new group name on the new primary.
2. On the secondary, leave the group. If you don't have your old secondary, then skip this step.
3. Take a backup from the old primary phone (if it is still accessible), if not, you could use the backup from the old secondary.
4. Restore the backup from step 3 on the new primary
5. Now create a new group from the new primary
6. Join the new group from the secondary phone
7. Transfer initial data from the new primary to secondary
8. If you have any recurring entries created on the old primary, delete them and re-create them again on the new primary (as recurring entries are device specific).