

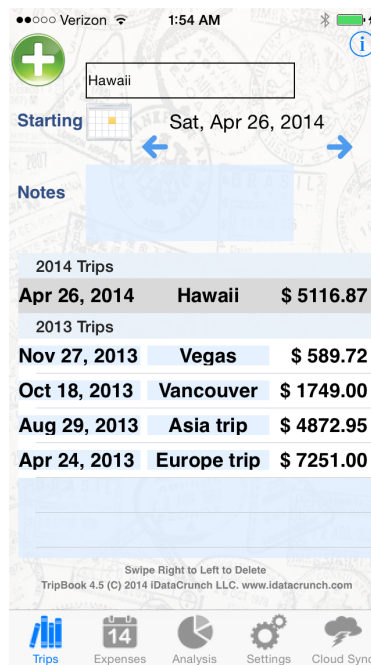


Trip Book 4.5 now with improved user experience!

User Manual

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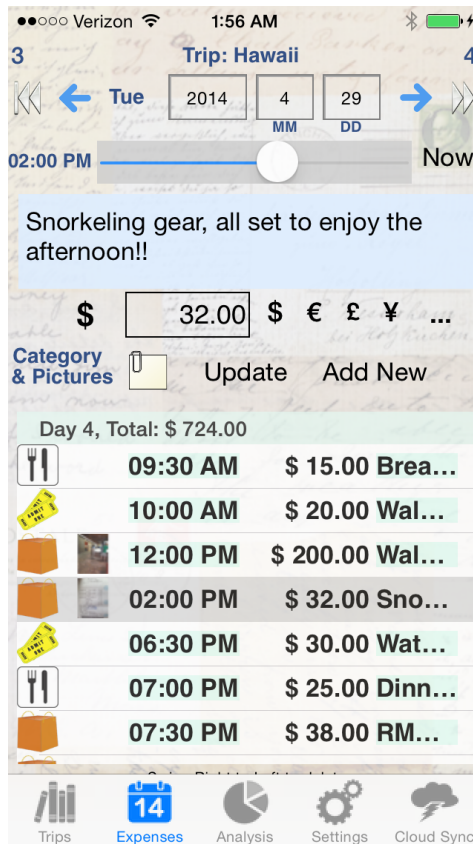
For Cloud Sync instructions please scroll down.



Create a New Trip

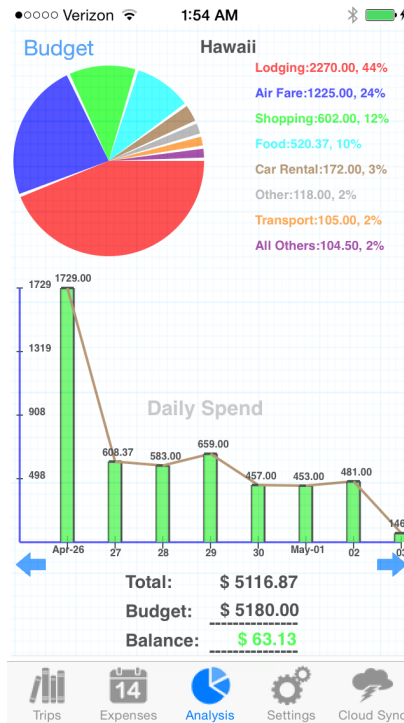
- Create a new Trip by touching New Trip Under the Trips tab
- Optionally enter a description for the trip in the Notes field, type in the description (you can enter multiple lines) and then touch on the background.
- Select a start date for the trip. You can also use the date picker to select a date
- Touch the Create button, you should now see an entry in the Trips table

Navigation: You can either touch the tab menu icons at the bottom or swipe right / left to navigate to the different screens.



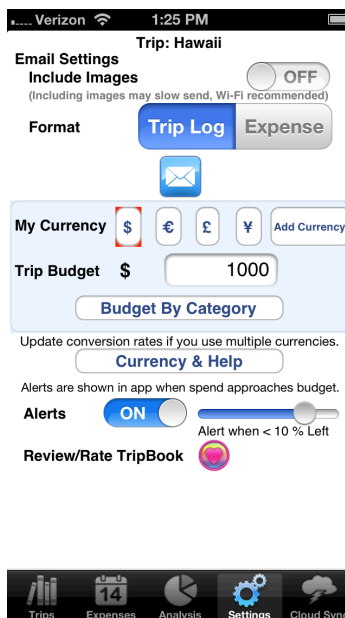
Enter itinerary & expenses

- Touch Expenses, here you can enter your itinerary/expenses for the trip
- Make sure you are on the correct date
- Choose the time using the slider, iPad users can also use the now button to set time.
- Type in a description for the expense/activity log, e.g. Trip to Eiffel Tower
- Enter in an expense amount optionally, touch on the currency of the expense (see settings to edit conversion rates)
- Now touch the Add button and your log will be added.
- If you want to categorize and add images, touch Category & Pictures
 - Touch on a category for the expense, or enter your own in the Other text field
 - You can scroll down and add a new custom category in the custom category table or choose an existing custom category that you setup.
 - You can either tag an existing image from your roll or take a picture (iPhone). Touch Tag to select a picture from your roll.
 - Camera support is available in iPhone only at this time; iPad users can take pictures outside of the app and tag them. To use the camera touch the camera icon, this will bring up the camera, take a picture and touch on Use. Note that the pictures taken in TripBook are stored in medium resolution.
 - Touch the back button.
- Repeat these steps for expenses/trip logs.
- To edit an expense you already entered touch it on the table and make edits and touch the Update button.
- To move an expense from one date to another, touch it and then change the date in the date fields on the top and touch Update, it will disappear from the current date you are on and be placed in the right page.



Analysis

- Touch analytics to see pie charts on your spending by category and by day as well as track your spending against your budget.
- Touch on Budget Analysis to view your spending vs. budget.
- You can toggle between spend analysis and budget analysis by touching the button.
- If you have alerts, a yellow warning icon will appear in the Pie chart view, touch it and a pop up will show you the alerts. The same alerts are displayed in the Budget Analysis as well as warning icons. To set the alert thresholds read below.
- You can change your currency in the Settings tab and view analytics in a different currency. For example if you want to see your spending \$ but if your preferred currency was Euro, then touch settings and change your preferred currency to \$ and touch analytics again. You can switch back your preferred currency at anytime in the settings.



Budget, Alerts Thresholds, Currency and Email

- Touch settings to enter currency details, budget, alert thresholds and to send trip log/csv emails.

Email:

- You can choose to attach all the images you have tagged/taken within the app by selecting the *include images* to ON. Note that this feature works best with Wi-Fi enabled, it may be very slow in 3G mode to attach pictures. You can choose the format of the email either Trip Log or Expense. Trip log is a friendly log/itinerary of your activities during the trip that you can email to your friends/family. Expense will generate an expense report in the form of CSV file (can be opened in Excel) that you can email out. Touch the Launch Email to send this out.

Currency:

- Enter your preferred currency, for each trip you can tag a preferred currency, all the analytics and expense reports will convert to this preferred currency. If you happen to use more than 1 currency during the trip touch on the Currency Conversions and enter the conversion rates. The conversion rates are not automatically updated. Also the conversion rates are by trip, for each trip you can enter a different conversion rate depending upon the timing of the trip.
 - Besides Dollar, Euro, Pound you can add one other currency for a trip. Touch Add Currency and then enter a name for the currency - note that once entered this currency cannot be renamed or deleted so please pay attention during this step. Once you add a custom currency make sure you enter the exchange rate if you happen to use any other currency besides it in that trip.

Detailed Budgets and Alerts

- Budget: Enter a budget for the trip optionally. The analytics tab will show the balance.
 - To enter detailed budgets by category, touch budgets by category and in the following screen enter category wise budgets. *Note that if you set detailed budgets the total is calculated automatically for you, if you previously setup a total budget, that budget will be deleted upon entering detailed budgets.*
- Alerts: Touch alerts on/off to disable enable alerts. The alert threshold determines when alerts will be triggered, for example if you leave the threshold at 10pc (default) alerts will be generated when your spending is $\leq 10\text{pc}$ of your budget. The same logic applies to category wise budgets as the total budget. Alerts are shown in the trips screen and in the analysis screen. In the analysis screen you will see a warning icon when there are alerts.

Cloud Sync

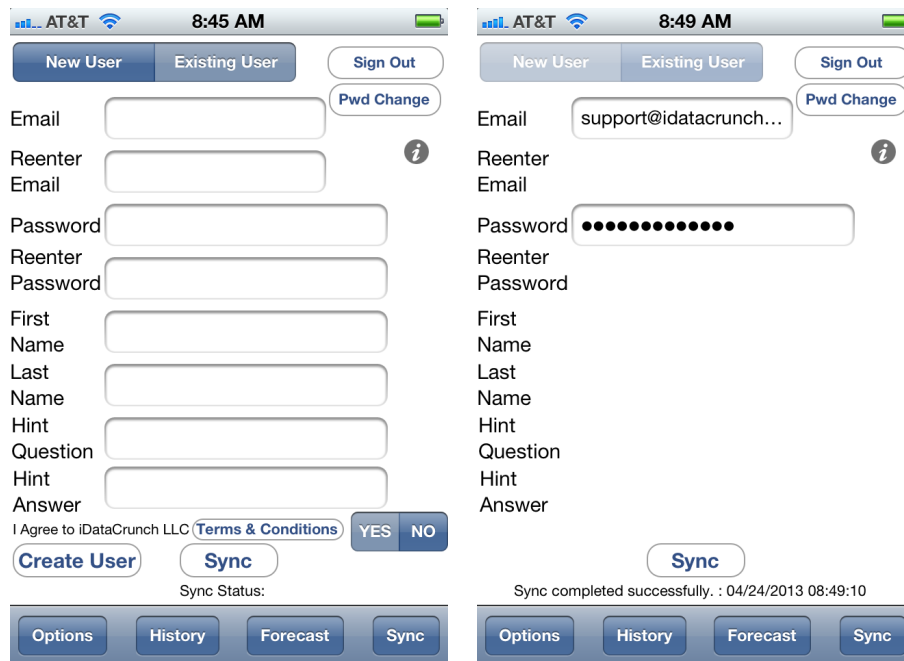
Cloud Sync is a paid auto renewable subscription. iDataCrunch Sync is a full featured and advanced fine-grained implementation of sync (*patent pending*). It is more flexible and full featured compared to other sync mechanisms. Visit the [app page](#) on iTunes for pricing and payment details this information is also available inside the app when you touch on “Sync”. Cloud sync allows for data on various devices that you own to be synchronized at a fine grained level. What this means is that you could change individual history items or forecasts or add new forecast books and all your devices upon sync will have the same data. iDataCrunch Sync server is used to store and manage the sync process. Sync uses your internet connection. If you are on a bandwidth constrained 3G plan **consider using sync only when you are in a Wi-Fi spot.**

First step in sync is to purchase the sync feature within the application. You only need to purchase this subscription on one device; **it will transfer to all your devices with no additional charge.** Make sure you are online either through Wi-Fi or 3G, purchase will *not* work in offline mode. Touch “Sync” to get started, you will see a dialog box showing details of what sync is, touch *More Details*. Pause for a second or so and you should see a dialog box showing the details of purchase price, length of subscription and terms of payment. If you want to continue to purchase, touch *Purchase*, you will get one more confirmation dialog asking if you want to purchase, touch *Confirm* and your purchase should be done. You will get an alert stating that the service is available on your device.

Transferring your purchase: On other devices that you use (make sure you are logged into device using your Apple ID) the sync subscription purchase will transfer with no additional cost. Touch on *Sync* and then *More Details*, in the following screen touch “*Already Purchased*” and your purchase will be transferred, this means that you have this feature available on both (or more) the devices.

Using Sync:

First step is to create an iDataCrunch User Account. Do so by filling out the form on the Sync screen. Make sure to agree to the Terms & Conditions, you can view them by clicking the button. First touch Create User (you must create user first before Sync). This should create a user. If you have already created a user on a different device touch Existing User and enter the credentials.



Once you are logged in you will see the above screen.

First Sync:

Note that the first sync will be slow, as it will push your images to the server. Please make sure to use high bandwidth Wi-Fi. It may also consume significant bandwidth depending upon the amount of data you have stored. Sync transmits images in batches and if you have lots of images will you be prompted to Sync repeatedly. Please delete unused past trips to speed up Sync and save space.

Now you can sync by touching the Sync button, doing so will publish and reconcile your data to the iDataCrunch Cloud. Make sure that you are connected to the internet. Repeat the same process on your other devices and data will be synchronized across all your devices, any change that you make on one device will be available on another device after you touch sync. Note: You must explicitly touch Sync button to synchronize your data each time on each device.

Once you have performed Sync from all the devices all your devices will contain the same information!!

Logging out: If you want to log out, touch Log Out. You will have to reenter your password by touching existing user and entering your credentials.

Changing Password: Touch on Change Pwd and you will be prompted to change your password. Once you change your password on one device effectively you are updating your password on the iDataCrunch cloud, you need to go on other devices and touch on Log Out and then re-login using your new password by touching existing user.

Lost Password: At this time this process requires sending an email to support@idatacrunch.com. Touch on the info icon (the “i” icon) on the Sync view, this will bring up a dialog box with a reference ID, in your email please mention the reference id, we cannot reset your password without this reference ID for security reasons. You can simplify this process as follows: After touching the info icon, take a snap of the screen by touching the Home button and the power button at the same time. This picture will be in your album, now open your photo album and then email that image to support@idatacrunch.com, small resolution is fine. Turn around time is about 48 hours and in some cases it could take longer. Future enhancements will make this process easier and automated.

Sharing & Family Sync:

You can share your TripBook data with family members through Sync. To enable this, you have to login from the App on each device using the same iDataCrunch Credentials on the Sync Tab. Note that each device needs to have the sync purchased/available, if you use same Apple ID on all the family devices, your sync purchase will transfer without charge. Once you login from a device you are authorizing all the data in that device to be synchronized with the cloud *bi-directionally*. By Syncing from a device you represent that you are authorized to access app data on the device review [terms and conditions](#).

Once you make a change on one device make sure to touch “Sync” to post that to the server. On the receiving end to receive latest updates click on “Sync”. Family sync can be a great and fun feature to enjoy your trip, expenses as you can exchange trip notes seamlessly!

Multi User Sync:

If you sync with another users data, all your data will be visible to them as well, however if you sign out and sign back as yourself you will stop publishing to them. For example: Tom syncs his data with Susan by allowing Susan to login into iDataCrunch from his device using her credentials and then touching Sync. At this point, all of Susan’s data will come down to Tom’s device all of Tom’s data will be posted to Susan’s iDataCrunch cloud account. Now Susan could Sign Out from Tom’s device. At this point Tom will see Susan’s data as a snapshot, any changes he makes will not post to Susan’s account. Tom can then log back in to his own iDataCrunch account and Sync. At this point, Tom’s account will have all his data + Susan’s data, other devices that Tom uses will have this data upon sync. Once Susan syncs her devices, all of Tom’s data will be visible to her across all devices along with her own data. At this point Tom and Susan both have each other’s trips on their devices! However any changes they make are only published to their

account. If they want to be able to share and see each other's updates they could use a common iDataCrunch account, read terms and conditions and privacy policy.

Sync & Delete:

Once you are synced if you delete an expense or a Trip, that data will be deleted across all your devices using the iDataCrunch account when they Sync (and your family devices if you are syncing with family members).

Unsubscribe:

Sync is implemented as an auto renewable subscription, which means that your iTunes account will be debited with the cost of the Sync feature on a yearly basis. *If you want to discontinue the auto subscription, you will have to do so from your iTunes account, this can be done from your device by touching App Store app. Touch Featured, navigate to the bottom and click on your account, you will see options for turning off auto renew. Once a subscription is purchased it cannot be cancelled for the duration of the subscription (year), you can however cancel future renewals, this is Apple policy, we cannot make any exceptions.*

Restrictions:

iDataCrunch could at any time impose restrictions on user creation and amount of data synced with its servers.

Terms & Privacy Policy: http://www.idatacrunch.com/About_Us.html

****Payment will be charged to iTunes Account at confirmation of purchase. Subscription automatically renews unless auto-renew is turned off at least 24-hours before the end of the current period. Account will be charged for renewal within 24-hours prior to the end of the current period, and identify the cost of the renewal. Subscriptions may be managed by the user and auto-renewal may be turned off by going to the user's Account Settings after purchase. No cancellation of the current subscription is allowed during active subscription period. Any unused portion of a free trial period, if offered, will be forfeited when the user purchases a subscription to that publication.**

Useful Tips

- On iPad if your app is ever stuck on the expense sheet and loses the bottom navigation bar, restart your iPad and the situation will resolve itself. To restart the iPad, hold the power switch down for a few seconds, you will then see a swipe to turn off message, go ahead and swipe. This issue has been addressed in version 1.2.
- If you are using multiple currencies or will track in multiple currencies setup conversions rates at the beginning of the trip.

Support

We love to hear from our users, so please email us with your questions, comments and suggestions for improvement. We strongly encourage you to write a review for this app on the [app store](#).

- Contact email: support@idatacrunch.com