
ReadMe File for Microsoft Money 2003 Version 11.0
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For up-to-date information on Microsoft Money, visit Money on the Web at <http://moneycentral.msn.com/money/2003/redir.aspx?mcrid=646>.

How to View This Document

To view the ReadMe.txt file on screen in Notepad, maximize the Notepad window.

To print the ReadMe.txt file, open it in Notepad or another word processor, and then click Print on the File menu.

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1: Installing Money 2003 Requires Hard Disk Space On Windows Drive

When you install Money 2003, Money requires that you install Internet Explorer 6.0, if it is not already on your computer. This requires up to 90 MB of disk space on the drive Windows is installed on. After installing Internet Explorer, you can choose the drive on which you want to install Money 2003.

NOTE: If you already have Internet Explorer 6.0, installing Money 2003 will require less space.

If you are low on disk space (less than 210 MB free if installing both Money and IE 6.0, less than 90 if you are just installing Money 2003) and want to free up more space on your hard drive, you can safely delete the contents of the media folder. To do this, go to the folder in which you installed Money, click the media folder and delete all the files in the folder.

If you delete these files, you will be unable to listen to the audio in the Money Setup Assistant. It will not prevent you from using any other features of Money 2003.

If you change your mind later, you can reinstall Money, and these files will be restored

2: Running Money 2003 And Earlier Versions Of Money On The Same Computer

In general, Money has limited support for a side-by-side installation of Money 2003 with earlier versions of Money. Before installing Money 2003, make sure you have the CD or installation source for the previous version available. If you want to use Money 2003 while also using another version of Money,

please read the following:

A. To install Money 2003 on the same computer with Money 2002

Note: If Money 2002 is installed on your computer, the default installation point is c:\Program Files\Microsoft Money.

1. Install Money 2003 on a different installation path than the earlier version of Money.
2. Make a copy of your Money 2002 data file.
3. Click the Microsoft Money 2003 Start Menu icon to start Money 2003.

Money creates a backup file named MyMoney.m10 (if your data file is named MyMoney.mny) and Money upgrades your data file. You now have two backup files you can use in Money 2002 if you choose. In addition to the copy you made in step 2, you have the MyMoney.m10 file that you can open or copy and rename.

B. To use the earlier version of Money, e.g. Money 2002

The first time you launch Money 2002 after installing Money 2003:

1. Click the Microsoft Money 2002 Start Menu icon to start Money 2002.
2. When the Password dialog box appears, click Cancel.
3. Click OK.
4. In the Open a File dialog box, select the Open/Work with an existing Money file option, and click Next.
5. Browse to the Money backup file created by Money 2003 (e.g. My Money.m10).
6. Select this file and click Open.

Once you have associated a Money data file with each version of Money, you can start the version you want by clicking the appropriate Start Menu icon.

C. To uninstall Money

1. Use Add and Remove Programs to uninstall the version of Money you want to remove.
2. If you uninstall either version, you may have to reinstall the version remaining on your computer. Make sure you have the original installation CD before uninstalling either version.

D. Other Notes:

1. Do not double-click files to open Money. Use the desktop icons or the Start menu

shortcuts, so you know which version you are opening. You will need to associate the

Money files with the correct version of Money first. Otherwise, you will get the

password dialog box when the older version of Money tries to open an upgraded file.

2. You cannot use different versions of Money for the same Money data file.

3. You cannot run both versions of Money at the same time.

4. Microsoft will not support more than two versions of Money installed at one time.

3: Money Not Compatible With Beta Versions of Operating Systems or Beta Versions of Internet Explorer

Please upgrade to the released version of your operating system or Internet Explorer before using Money.

4: Installing Money 2003 on machines with anti-virus software.

Some anti-virus software may interfere with Microsoft Money setup. You may want to

turn off any anti-virus software before installing Money. Be sure to remember to turn it

back on when Money setup is complete.

5: File Size And Money 2003

The file format used by Money 2003 lets the Money team create powerful features such as the Advisor FYI, the Lifetime Planner, and the Monthly Report (all available for Deluxe users). You might notice that your converted Money 2003 file is bigger than your old Money file.

However, you'll find that Money's compressed backup files are much smaller

than your regular file. So if you need to take your data file to another computer, use the File/Backup command.

6: Internet Connections Require WinSock-Compliant ISP

Money 2003 allows you to make many connections to the Internet to gather information and advice about your finances. To connect to the Internet, you need an Internet service provider (ISP) that works directly with the 32-bit WinSock included with Windows 98, Windows 2000, Windows ME, and Windows XP.

Most full-service Internet providers (those not requiring custom software to access their service) will support the 32-bit WinSock. If you have questions about your Internet connection compatibility, ask your ISP if it supports the Windows 32-bit WinSock.

NOTE: If your ISP is America Online, make sure that you are using America Online Version 3.0a for Windows 95 or a later (not preview) version.

7: Restart Windows After Upgrading Internet Service Provider (ISP)

If you install new software from your ISP, you should restart Windows before attempting to make an Internet connection in Money. Failure to restart after upgrading your ISP software may cause miscellaneous errors in Money 2003.

8: Internet Explorer Security Settings

The following security settings are recommended when making Internet connections in Money.

1. On the Tools menu in Money, click Connection Settings.
2. Click the Security tab.
3. In the security settings area, select the Internet zone (globe icon)
4. Using the slider below, move the slider to High (most secure).

Note: Internet Explorer 6.0 or later is required to run Money, but Money still allows you to use your default browser.

9: Internet Options May Cause Money 2003 Areas To Wash Out

If you modify your Internet Explorer Multimedia settings and clear the Show Pictures check box, several places in Money may appear "washed out" and the text may be unreadable. Follow these steps to resolve the problem:

1. On the Tools menu, click Connection Settings.
2. Click the Advanced tab.
3. Scroll down until you see the Multimedia section.
4. Check the Show pictures box.

10: Money 2003 On Windows 98 Stops Responding If Modem Not Plugged In To Phone Line

Money may stop responding in the Initializing and Contacting Server portion of the Call Progress dialog box. This occurs if you are using Windows 98 and try to make a direct modem connection in Money 2003 while the modem is not connected to a phone line. You cannot use any other Windows 98 modem application.

The solution is to restart Windows and make sure that the modem is plugged in to the phone line before attempting to make a direct modem connection.

11: Windows 98 Issues With U.S. Robotics ISDN Modem And Regular Modem

If you are using Windows 98 and have a U.S. Robotics 128k ISDN adapter installed, Money 2003 may stop responding or return the following error message when you try to connect to your online banking service provider:

Money could not complete the call due to a problem with your modem installation.

For information on how to troubleshoot this error, refer to the Microsoft Knowledge Base article, "Money: Online Banking Hangs with U.S. Robotics ISDN Adapter Installed." This article is available at <http://support.microsoft.com/support/kb/articles/q160/0/51.asp>.

12: Disable Remote WinSock If You Dial Up Directly To The Internet

If you are establishing Dial-Up connections directly to the Internet (using an Internet service provider or Dial-Up connection through MSN), you need to disable Remote WinSock. You may not need to disable Remote WinSock if you are dialing into a LAN or using a corporate intranet. Consult your network administrator.

1. Click Start, point to Settings, and then click Control Panel.
2. Double-click WinSock Proxy Client.
3. Clear the Enable WinSock Proxy Client check box.

13: Printer Drivers

If you experience problems printing in Money 2003, you should get

an updated driver from the printer manufacturer. This is often the first step in troubleshooting printing problems.

14: Continuous Feed Wallet Checks On Windows NT

If you are using continuous feed (dot-matrix) checks on Windows NT, Money skips two checks after the fourth check in a series. For this reason, wallet-sized continuous feed checks are not recommended for Windows NT users.

If you must use continuous feed wallet checks on a Windows NT system, you should not print more than four checks at a time.

15: Printing Partial Sheets Of Checks On Sheet Feed Printers

Money defines a partial sheet of checks as when you have removed at least one of the checks from a single sheet prior to loading the sheet of checks into the printer. Money prints partial sheets of checks in landscape mode. (This orientation is similar to how you print an envelope.)

Printing partial sheets of checks (single-sheet style) is not supported by all laser or inkjet printers. Due to the feed mechanisms of some printers, it is difficult to align and print on partial sheets of checks.

The following printers have been tested and shown to have problems printing partial sheets of checks in Money:

- Apple Color LW 12/660
- Canon Bubble-Jet BJC 4550
- Canon Bubble-Jet BJC-610
- Epson Stylus 1520
- Epson Stylus 800
- Epson Stylus Color Esc/P 2
- HP Color Laser Jet 5
- HP LaserJet 5000
- HP LaserJet 6P
- HP LaserJet Indra
- HP LaserJet 4MV
- IBM 4019 Laser Printer
- Lexmark ExecJet IIC 4076
- Tektronix Phaser 360

If your printer has difficulty feeding partial sheets of checks in landscape mode, you can order Laser Voucher checks that never have partial sheets. You can also print Laser Standard or Laser Wallet checks in batches of three.

Depending on the feed mechanism of the printer, the following method might work to feed partial check sheets:

1. Load the partial sheet into the printer as if it were a full sheet. Push the sheet all the way into the tray.
2. On the File menu, click Print Checks.
3. Verify that the number of checks to print equals the number of checks remaining on your partial sheet. If the number of checks to print is incorrect, follow these steps:
 - a. Click Selected Checks.
 - b. Select up to the number of checks remaining on the partial sheet.
 - c. Click OK.
4. Make sure to enter the correct check number for the first check.
5. In answer to the question "How many checks are on the first page?", click Three. This causes Money to print in portrait orientation.

16: Tour, Video, And Audio Help Requirements

- The Money Video Help, and Audio Help are not available in all versions of Money. They are not available if you downloaded the Trial version of Money 2003 from the Web or a CD Trial version. If Money came pre-installed on your computer, these may or may not be available, depending on the version of Money installed by your computer manufacturer.
- The Videos and Audio Help are best experienced when your speakers are turned on and the volume is set appropriately.
- To view the Videos, you must have Internet Explorer 6.0 or later installed. Money installs this automatically when you install Money 2003.
- If you have manually removed Internet Explorer, you'll need to reinstall it.
- If you need to reinstall Internet Explorer, run the IE6setup.exe program from the IE folder on the Money CD-ROM.
- Your Internet Explorer security settings should be set to the default of Medium or lower to run the Tours for the first time.

17: Display Color Settings

While Money 2003 contains some color scheme options that may work in 16-color mode, Money 2003 was designed to work in 256-color mode or higher.

The Money 2003 multimedia tours and help videos are designed to work in 256-color mode or higher. If you run these in 16-color mode, the tours and videos may run slowly or may be illegible. For this reason, it is highly recommended that the tour and videos never be run using this color setting.

To check or change your color mode, follow these steps:

1. Click Start on the Windows taskbar, point to Settings, and then click Control Panel.
2. Double-click Display.
3. Click the Settings tab.
4. Check the Color Palette setting to see which mode your computer is running in. If your video card supports 256 colors, you'll see that option in the Color Palette drop-down menu.
5. Choose 256 Color from the list, and then click OK.
Windows will ask if you want to restart your computer so the change can take effect. Click Yes.

18: How To Obtain Euro Currency Symbol

If you enable Money 2003 for the euro currency, Money may not correctly display the euro currency symbol. For more information on this issue, refer to the Microsoft Knowledge Base article, "Money 2002: How to Obtain the Euro Symbol." This article is available at <http://support.microsoft.com/support/kb/articles/q156/1/81.asp>.

19: Quicken Versions Supported By The Quicken Conversion Wizard

Money can convert data files from Quicken versions 4, 5, 6, 7, 8, 9, 10, 11 (Quicken 2002) if you have Internet access.

20: Checks Remaining To Print Do Not Increment

If you use the Print Checks Reminder in the account register, Money does not increment the number of remaining checks the next time you print checks. There are two workarounds for this problem:

- Navigate to the Manage scheduled bills and deposits page or the account list before printing checks. If you use the Print Checks reminder in these areas, Money correctly increments the number of checks you have remaining on your sheet of checks.
- Manually update the number of checks remaining on your sheet of checks whenever you print checks.

21: Money May Appear to Stop Responding if AOL 5.0 or 6.0 Users Do Not Check the I use AOL to connect to the Internet Setting in Tools/Options/Connections.

America Online (AOL) uses unique proprietary dialer software. When using Money with AOL, you must first connect to the Internet before using Money's

online features. To connect to the Internet using AOL:

1. Start the AOL software.
2. Let the software dial and connect.
3. Minimize AOL.

NOTE: Do not exit AOL. You must leave AOL running to provide the Internet connection.

4. Continue to use Money. The online features should now work automatically.

If you are an AOL user, and Money appears to stop responding, check to see if you are online by opening the AOL window and navigating to the Internet. If you can navigate to the Internet within AOL, but Money is still not working correctly, close Money (leave AOL running) and try again.

22: Canadian Users of Money 2003 Standard Need to Use Canadian Settings

Attention Canadian Users of Money 2003 Standard: If you create a new file in Money 2003, it's important that you run Money with Canadian settings before creating the new file, in order to start with the appropriate set of default

categories. If you are already using Money, you will know you are using U.S. Settings if you have a Taxes menu in the navigation bar. (See below for more information on Canadian Taxes.) Please refer to Help for more information on how to switch to Canadian Settings. Make sure that you click File, point to New, and then click New File to create a new file after switching to Canadian Settings.

For Canadian Tax functionality, click Categories & Payees on the Accounts & Bills menu in Money. In the left pane, click Set up tax categories to select the Tax Forms and Tax Lines that are associated with each category. When you are ready to do your taxes, click Export to Tax Software on the File menu.

23: Electronic Payments are Entered into the Account Register Using the Process Date

Money 2003 enters electronic payments into the account register using the process date. After this date, payments can no longer be canceled. However, the funds may not be withdrawn on this date based upon the payment method used by your financial institution or bill payment provider.

If you would prefer to not have Money use the processing date for entering scheduled electronic payments into the account register, clear the "Enter electronic payments in the register with the processing date" check box in Tools, Options, Online Services Tab. All future payments scheduled by your financial institution or bill payment provider will show in the register with either the due date, or the date funds are withdrawn from your account, whichever is earlier.

1. On the Tools menu, click Options.
2. Click the Online Services tab.
3. Uncheck the 'Enter electronic payments in the register with the processing date' checkbox.
4. Click the OK button.

All future payments scheduled by your financial institution or bill payment provider will show in the register on either the due date, or the date funds are

withdrawn from your account, whichever is earlier.

Note: This date may be after the date when a payment may be canceled. To see the processing date, right-click the payment and select Payment Status. The processing date will be displayed. Unchecking this option does not change the date of previous transactions.

24: Money for Pocket PC Requires Upgrade to Money 2003 for Pocket PC

If you use Money for Pocket PC and synchronize it with your desktop Money file, you need to upgrade Money for Pocket PC so that it will work correctly with desktop Money 2003.

Note: you may also need to upgrade your Pocket PC operating system. Money for Pocket PC will only run on the Pocket PC 2002 operating system. To upgrade, contact the manufacturer of your device.

To install or upgrade Money for Pocket PC:

1. Go to the directory where you installed Microsoft Money 2003. (By default, the directory is C:\Program Files.)
2. Click Microsoft Money, and then click Money for Pocket PC.
3. Double-click setup.exe, and then follow the instructions on the screen.

Some downloaded versions of Microsoft Money will not include Money for Pocket PC.

You can download a free copy of Money for Pocket PC on the Pocket PC Web site:

<http://www.microsoft.com/mobile/pocketpc/default.asp>.

25: Updates to MSN Money Synchronization Require Synchronization Setup in Money 2003

If you are upgrading to Money 2003 and have used MSN Money Synchronization in previous versions, you will need to set up MSN Money Synchronization again. (MSN Money Synchronization was known as MSN MoneyCentral Synchronization in Money 2001 and earlier versions.)

The data that you synchronized in earlier versions will not automatically appear in your online portfolio or account lists until you set up synchronization in Money 2003. Once you complete setup, your portfolio and accounts will appear online, as well as your bills.

To set up MSN Money Synchronization:

You must have a .Net Passport to use MSN Money Synchronization. If you do not have a .Net Passport, you can set one up in step 3.

1. Make sure you're connected to the Internet and signed into your Money file using .Net Passport.
2. On the Tools menu, click Access My Money Data On The Web.
3. Read the information on the Setup MSN Money Synchronization page, and then click Setup. Money will connect you to MSN Money.
4. Do one of the following:
 - If you have no accounts or investments already set up on MSN Money, go to step 6.
 - If you have only an investment portfolio set up either on MSN Money or in your Money file, you'll see the Synchronize your investment portfolio page. Select the option you want, and then click Next. Go to step 6.
 - If you already have accounts other than an investment portfolio set up on MSN Money, you'll see the Accounts already on MSN Money page with your accounts displayed in a list. Click Next and then go to step 5.
5. If you already have accounts other than an investment portfolio set up in your Money file, you should see the Identify MSN Money accounts page. Follow the instructions to match each account from MSN Money to the appropriate account in your Money file. If the account has not already been created in your Money file, create a new account. Click Next when the information on this page is correct.
6. On the Summary of your accounts on MSN Money page, review the information and then click Done.

26: MSN Money Synchronization Does Not Include Credit Card Bills
Categorized as
Transfers

In Money 2003, you can see your bills and deposits online if you use MSN Money Synchronization. However, it may be that you will not see your credit card bill. Many people categorize credit card bills as transfers from one account to another. MSN Money Synchronization does not include transfers so you will not see credit card bills, investment purchase bills, or any other bills or deposits that you have categorized as transfers.

27: Important Information about Online Services

In Money 2001 and previous versions, some financial institutions used an older format to exchange data. These financial institutions are listed below. (If your bank is not on the list, your services will not be affected, and you can disregard this section).

In Money 2003, all of the institutions listed below are upgrading to the newest data exchange format called OFX. This upgrade will occur when you accept an online service update from the financial institution. The upgrade is necessary if you want to use direct connection services with your bank or brokerage in Money 2003.

Note: If you do accept this upgrade in Money 2003 you will be unable to continue using direct services in Money 2001 unless you follow the steps below. It may not be possible to revert to using versions of Money prior to Money 2001.

In order to resume online banking with a Money 2001 file, you will need to copy the file "fipartnr.ini" from the PSS folder on the CD into your System folder where Money 2001 is installed, replacing the existing fipartnr.ini file. (usually at C:\Program Files\Microsoft Money\System\fipartnr.ini). Then in Money 2001, navigate to the Online Setup for your bank, hold down the Ctrl+Shift keys and click the Modify button. The button text will change to Update. Click Update and follow the conversion steps that Money will suggest.

The following banks will be upgrading to OFX for Money 2003:

American National Bank
Arizona Bank
Bank of Stockton
BankBoston PC Banking
Centura Bank
Commerce Bank, NA
Commercial Federal Bank
Compass Bank
Eastern Bank
Fleet Online Banking
Huntington Bank
JPMorgan Chase Bank
JPMorgan Chase Bank of Texas
Key Bank
LaSalle Bank NA
Manufacturers & Traders Trust
National Penn Bank
Nevada State Bank
NorwestBank
Regions Bank
Republic National Bank of NY
Smith Barney
Spectrum Connect/Reich & Tang
Standard Federal Bank
SunTrust
The Laredo National Bank
Union Bank of California
United California Bank
US Bank
Vectra Bank Colorado
Wells Fargo
Zions Bank

28: Unable to Start Money after upgrading to Windows XP

You may receive an error when you attempt to start Money after you install the Microsoft Windows XP operating system.

To resolve this issue, use the Program Compatibility Wizard in Windows XP to select

a compatibility mode for Money.

1. Click Start, point to Programs or All Programs, point to Accessories, and then click

Program Compatibility Wizard.

2. Click Next.

3. Click I want to choose from a list of programs, and then click Next to see a list of

programs that are currently installed on your computer.

4. In the Select a program list, click Microsoft Money, and then click Next.
 5. Under Select a compatibility mode for the program, click a compatibility mode, and then click Next. For example, select Microsoft Windows 98/Windows Me or Do not apply a compatibility mode.
 6. In the Select display settings for the program page of the wizard, click Next.
 7. In the Test your compatibility settings page, click Next to test Money with the new compatibility settings.
 8. If Money starts successfully, proceed to step 9. If you receive the error message, follow these steps:
 - a. Click OK in response to the error message.
 - b. Click No, try different compatibility settings, and then click Next.
 - c. Repeat steps 5 through 7 to select and test a different compatibility mode with which to run Money.
- When Money starts successfully by using the compatibility mode that you specify, proceed to step 9.
9. Switch to the Program Compatibility Wizard, click Yes, set this program to always use these compatibility settings, and then click Next.
 10. In the Program Compatibility Data page, specify whether or not you want to send program compatibility information to Microsoft, and then click Next.
 11. Click Finish.

29: Installation Package Cannot Be Installed by the Windows Installer Service

When you attempt to install Money on Windows 98, you may receive an error message similar to:

This installation package cannot be installed by the Windows Installer Service. You must install a Windows service pack that contains a newer version of the Windows Installer Service.

This issue can occur if an outdated version of Windows Installer is installed.

To resolve this problem, manually start the installation of Money by following these steps:

1. Quit all programs that are running.

2. Insert your Money 2003 CD-ROM. Press and hold down the SHIFT key when you
insert the CD-ROM to prevent Money Setup from starting automatically.
 3. On the desktop, double-click My Computer.
 4. Right-click the CD-ROM drive, and then click Open.
 5. Double-click msiw9x.exe, and then follow online instructions.
 6. Restart your computer.
 7. Double-click My Computer.
 8. Double-click your CD-ROM drive.
 9. Double-click Setup.exe to install Money 2003.
-

30: Cannot Start Money after Setup

Money may not start properly if the installation of the System Pack was cancelled or if you chose not to install Microsoft Internet Explorer. To resolve this issue, reinstall the Microsoft Money System Pack and then Microsoft Money.

1. Insert your Money 2003 CD-ROM. Press and hold down the SHIFT key when you
insert the CD-ROM to prevent Money Setup from starting automatically.
 2. On the desktop, double-click My Computer.
 3. Right-click the CD-ROM drive, and then click Open.
 4. Double-click Syspack.msi, and then follow the instructions on the screen.
-

31: Money May Conflict with DirecPC Satellite Internet Connection Software.

If you use DirecPC and you receive the following error message -- Unable to initialize a required Money component -- it is because of an incompatibility between Money and DirecPC. To resolve this problem, you have to uninstall Money, uninstall the DirecPC program, reinstall Money and then reinstall the DirecPC program.

For more information about how to uninstall DirecPC software, consult the program documentation, contact DirecPC Technical Support at 1.800.347.3272 or visit the DirecPC Web site at <http://www.direcpc.com>.

32: Money Is Unable to Verify Your Online Sign In Name

When you attempt to sign in to Passport, you may receive an error message similar to:

Money is unable to verify your Online sign in. Money will now try to log you in using Work Offline sign in. Some online features such as background banking, will be unavailable, possibly because of network problems. To use these features, please close Money and try to sign in again later.

This issue can occur when you set the Privacy setting in Internet Explorer to High or Block All Cookies.

To resolve this issue, make sure that you are connected to the Internet. If that does not resolve the issue, follow these steps.

NOTE: Because there are several versions of Windows, the following steps may be different on your computer. If they are, please consult your product documentation to complete these steps.

Allow Cookies in Internet Explorer

1. Start Internet Explorer.
2. On the Tools menu, click Internet Options.
3. Click the Privacy tab.
4. Drag the slider to Medium.
5. Click Apply, and then click OK.

More Information

A cookie is a file that is created by an Internet site to store information on your computer, such as your preferences. For example, if you inquire about a flight schedule at an airline's Web site, the site might create a cookie that contains your itinerary or a record of the pages that you looked at within the site that you visited. The information in the cookie can help the site customize the view for you the next time that you visit.

33: Money May Conflict with Firewall Software

When you attempt to download online stock quotes in Microsoft Money, you may receive an error message similar to:

Money was unable to connect to the online quotes server. Check your Internet connection

and try the operation again.

This behavior can occur if third-party firewall software such as Norton Personal Firewall or Zone Labs' ZoneAlarm is installed on your computer. To resolve this behavior, change the settings of your firewall software product to give programs such as Money permission to download without interference. Consult the firewall software help system or documentation to find out more.

For more information about Norton Personal Firewall, visit the following Symantec Web site at <http://www.symantec.com/sabu/nis/npf/supportmenu.html>.

For more information about ZoneAlarm, visit the following Zone Labs Web site at <http://www.zonelabs.com/services/support.htm>.