

INTERNAL USE: **Dbox controls**

Closes this dialog box and saves any changes that you have made.

Closes this dialog box and saves any changes that you have made.

Closes this dialog box without saving any changes that you have made.

Shows all of the transactions that involve this payee.

Shows all of the transactions that involve this item.

Shows all of the transactions that involve this investment.

INTERNAL USE: **Etc.**

Assigns a different category to every transaction currently assigned to this category.

Shows the Account Details place for this account. In the Account Details place you can enter and change account information and set up Online Services.

Balances this loan account.

Shows the investment account that is directly associated with this investment account.

Updates the investments held in this retirement account so that they match a recent statement.

Displays the cash account that is directly associated with the investment account.

Prints the payments for which you've entered "Print" in the Number field.

INTERNAL USE: **Payees and Categories**

Displays the corresponding list to the right.

Click this button to add a new payee to the list above.

Changes the category of the transactions assigned to the category that is selected above.

Deletes the item highlighted in the list above.

Renames the classification selected above.

Deletes the classification selected above.

INTERNAL USE: **Navigation Bar**

This is Money's navigation bar. Use it to jump between places within Money.

Displays any of Money's areas or directly to any of your Favorite Accounts.

Returns to the Money Home screen.

Displays the Accounts place, where you can use the Account Register.

Displays the Bills & Deposits place, where you can manage your cash flow.

Displays the Online Financial Services place, where you can do online banking and investment transactions.

Displays the Investments place, where you can track your investment portfolio.

Displays the Financial Planner, where you can set goals, create a debt reduction plan, and budget your expenses.

Displays the Report and Chart Gallery, where you can view summary reports about your finances.

Displays the Categories and Payees place, where you can see who your money is going to.

Displays Decision Center, where you can read up on basic finance and use financial calculators.

Returns to the last place you visited.

Starts the Money browser so you can browse the Web from within Money.

Displays the Help pane where you'll find information about how to complete the tasks you want to do.

Displays the Money Home screen, where you can see a summary of your financial situation and current financial advice .

Returns to the last area you visited in Money.

Click the triangle on the left of the View Bar to customize your Account Register display.

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Click the triangle on the left of the View Bar to customize your Account Register display.

Click the triangle on the left of the View Bar to customize your Investment Portfolio display.

Click the triangle on the left of the View Bar to customize your Bill Calendar display.

Click the triangle to the left of the View Bar to customize your Account Manager display. Click Account Balances to see the current balances of all your accounts.

Displays a list of Help topics for this area.

INTERNAL USE: **Reports and Charts**

Displays the corresponding list of reports and charts to the right. (what is this?)

These reports and charts relate to the report type selected in the left pane. Click another type to see the other available reports and charts . When you want to view a report or chart, select it and then click Go To Report/Chart. All reports and charts can be customized to present your information exactly as you want it.

Displays the report or chart that's highlighted to the left.

Renames the highlighted report in the My Favorites list.

Deletes the highlighted report from the My Favorites report list.

INTERNAL USE: **Bills place**

Forecasts your bank balances, taking your scheduled bills and deposits into account.

Shows you, in calendar format, on what days your upcoming bills and deposits are due and when you recorded past transactions.

Lists your upcoming bills and deposits, lets you edit and record them, and allows you to schedule new ones.

Lists bills and deposits that you have recorded in Money within the past 60 days.

Shows you a list of all of the recurring transactions you have scheduled in Money, lets you edit them, and allows you to schedule new ones.

Lets you sign up to get your bills online. Once you've signed up, this lets you log on to your E-bill Web site to check for new E-bills.

INTERNAL USE: **Bills/Pay Bills**

Lists upcoming bills, deposits, transfers, and investment purchases.

Creates a new deposit, bill, transfer or investment purchase.

Records the selected transaction(s) in the appropriate Account Register(s). You will be able to edit the details of each transaction selected prior to entering it. If this is an E-bill, clicking this button takes you to your E-bill Web site.

Allows you to edit the details of this transaction.

Allows you to skip this individual payment, deposit, transfer, or investment purchase.

Shows you the balance of your open bank, cash, investment cash, credit card, checking, line of credit, and savings accounts.

INTERNAL USE: **Bills/Setup Bills & Deposits**

Lists all of the recurring bills, deposits, transfers, and investment purchases you have scheduled in Money.

Schedules a new deposit, bill, transfer or investment purchase.

Allows you to edit the details of this recurring transaction. All changes made here will affect all future occurrences of this transaction.

Deletes all occurrences of this scheduled transaction.

INTERNAL USE: **Bills/Bill Presentment**

Shows you a video explaining some of the details about getting and paying your bills online.

Logs you on to your E-bill provider's E-bill Web site.

Sets up Money to take advantage of electronic bills (E-bills).

INTERNAL USE: **Bills/Balance Forecast**

Displays balance forecast for these accounts.

Select the period for which you want to view a forecast.

INTERNAL USE: **Bill Calendar**

Select each transaction you're considering entering into the Account Register by checking the box to the left of the transaction. Then you can view your account balances under New Balance to see if you'll have enough to cover the bills.

Adds a new payment, deposit, or transfer to the Bills list. The more thorough you are in including your upcoming payments and income, the more accurate your balance forecast will be, below.

Makes changes to the transaction highlighted above.

Deletes the selected transaction.

Clears all of the transactions above.

Enters the selected transactions into the Account Register. You'll get a chance to edit the transactions before they're entered.

In step 2, check the balances of the accounts affected by the transactions selected above to make sure they won't put you below your minimum balance.

In step 2, check the balances of the accounts affected by the transactions selected above to make sure they won't put you below your minimum balance.

In step 3, click the Enter button to enter all the selected transactions into the Account Register. You'll get a chance to make changes to the transactions before they're entered.

In step 3, click the Enter button to enter all the selected transactions into the Account Register. You'll get a chance to make changes to the transactions before they're entered.

Displays the Account Register, where you can enter all your transactions and balance your accounts. This Account Register is similar to the one in your check book. It has a transaction register above and checks and forms where you can enter transactions below.

Takes you to the Bill Calendar, where you can automate your recurring payments, deposits, and transfers.

For example, if you enter your monthly utility bill, you only have to enter the information once. When it's due, you'll get a reminder and the transaction will be entered automatically once you've made any necessary changes. You can also easily check if you have enough in your account to cover the payment.

You can use the Bill Calendar for paychecks as well as payments. You might also want to use the Bill Calendar to remind you of a single important transaction, such as the maturity date for a certificate of deposit.

Displays the Online Financial Services place.

Displays the Online Financial Services place.

INTERNAL USE: **Contents screen or nav bar for each area**

Displays the Account Manager, where you can see your current account balances. You can also create a new account, and delete or modify an existing account. And, you can view and change your Account Details, and set up accounts for use with Online Services.

Displays the Investments place, where you can see a summary of your current investment holdings and their values and update the market prices of your investments. Before using Money's Investments place, it's important to understand the difference between investment accounts and investments:

- Investment accounts provide a place to track your investments.
- Investments are added to investment accounts. You can have multiple investments in one investment account, just as you might hold a variety of investments through a single brokerage.

Displays the Report/Chart Gallery, where you can check on your current financial status, see trends, summarize information, and provide others with information through printing and exporting.

Displays the Categories and Payees place, where you can see a list of all your payees, categories, and classifications.

Connects you to the Internet, if you have a modem and an Internet Service Provider. Once connected you can navigate to the Money Home Page where you can get more information on Money and personal finance, have your questions answered by the experts, and find updated product release information. If your Web browser doesn't allow you to get to the Money Home Page directly, open the browser and type the address <http://www.microsoft.com/MoneyZone/>.

Displays Money's chart of the day. Click the triangle to the left if you want to display another chart. Click Change Each Day to have the chart automatically change every day.

Displays Money's chart of the day. Click the triangle on the left of the title bar if you want to display another chart. Click Change Each Day to have the chart change automatically every day.

INTERNAL USE: **Accounts: Investments**

Lets you rename the investment account or enable/disable its associated cash account. The name will be changed throughout your Money file.

Excludes transactions from this account from your tax reports. Choose this option if the account contains only tax-deferred investments.

Displays the associated cash account for this investment account. From there you can enter and change information about the account and view the account's running balance over the last 12 months.

Choose the view you want to see for the selected item.

Displays the details for the investment or investment account highlighted above.

Creates a new investment or investment account. If you create a new investment, such as a stock, bond, or CD, the investment won't actually be part of your portfolio until you enter a buy transaction for it in the Account Register. This allows you to track the performance of a stock or other investment you don't actually own without throwing off your records. If you want to see all the investments you've entered, click the down-arrow at the upper-left of the screen.

Displays the price history of an investment and allows you to update the price manually.

Displays the price history of an investment and allows you to manually update the market price of an investment.

Deletes the selected investment or investment account .

Records a split for any of your investments, such as a stock split. Money will adjust the price and quantity of your investment to reflect the split and these changes will also be reflected in the Investment Portfolio and in the Update Price dialog box.

Records a split for any of your investments, such as a stock split. Money will adjust the price and quantity of your investment to reflect the split and these changes will also be reflected in the Investment Portfolio and in the Update Price dialog box.

Updates your investment prices electronically. Online Quotes will automatically update the market price of each investment for which you've entered an official, market-approved symbol in Investment Details.

Updates your investment prices electronically. Online Quotes will automatically update the market price of each investment for which you've entered an official, market-approved symbol in Investment Details.

Sets up Online Quotes or allows you to change your existing setup information. When you've configured Online Quotes, this lets you to download the most recent prices for your investments.

Sends all the instructions listed on the left to your financial institution. If there are any instructions you don't want to send on this call, right-click the instruction, and then click Don't Send on Next Call.

Creates a new account.

INTERNAL USE: **Online**

Provides a tour of online banking services.

Provides a list of the accounts that are set up for online.

Displays the highlighted bank account.

Sets up a new online account.

Deletes this account.

Renames this account.

Moves this account to another financial institution.

INTERNAL USE: **Online/contact information**

Displays the address of this financial institution.

Displays the phone number of this financial institution.

Displays the e-mail address of this financial institution.

Displays the Internet address of this financial institution.

Displays any comments that are relevant to this financial institution.

Displays the financial institution's home page.

Displays the financial institution's Web statements page.

Displays the Bill Pay Web page for this financial institution.

Restores the default settings for this financial institution's web pages.

INTERNAL USE: **Online/Bill pay**

INTERNAL USE: **Online Banking Area**

Sets up Online Services and makes changes to your existing setup information, such as the details of your address or phone number. You can also set up additional accounts for Online Services here.

Dials a toll-free number so that Money can download information about the Online Services provided by your financial institution. Once you have this information you can decide whether you want to go ahead and sign up.

Sends your Electronic Payments. If there's a payment you don't want to send on this call, right-click it, and click Don't Send on Next Call.

Connects to your financial institution and download your transaction information.

Provides more information on Money's Direct Statements and Online Bill Payment.

Connects to the Internet to get updated information on this bank.

Changes the name that you've entered for this bank. The new name will replace the old name throughout Money.

Brings you to the selected bank's Web site The Internet address for this site is listed in the box to the left.

Creates a letter which will be sent electronically to your bank. You can send letters to order new checks, get copies of processed checks, or send general-purpose inquiries. You'll need to connect to your bank again in a few days to get a response.

Displays the downloaded statement that is highlighted on the left and allows you to enter the transactions into your Account Register.

Displays the downloaded statement for this account.

Displays status details of the payment highlighted in the list above.

Shows the Account Details view, where you can enter and change information about the account highlighted above.

Displays the Account Register for the highlighted account.

Sends a payment investigation instruction to your financial institution.

Lists all of the transactions you've sent through Online Bill Payment in the last 60 days. Highlight a transaction, and then click the Payment Status button.

Lists all of the accounts you've set up with this bank. The accounts with check marks are the accounts are set up to use Direct Statements.

Displays the downloaded statement for the account highlighted to the left.

Lists all of the accounts that you've set up for Direct Statements. The amount in the Bank Balance column is the latest balance you've downloaded for the account. If any of the accounts have transactions to download, highlight the account, and then click the Read Statement button to add the transactions to your Account Register.

Sends the instructions listed above to your financial institution. If there are any instructions you don't want to send on this call, right-click the instruction, and then click Don't Send on Next Call.

Creates a letter that can be sent electronically to your financial institution. You can send general-purpose inquiries, order new checks and get copies of processed checks. Remember, you'll have to connect to your financial institution again to receive a response.

Lists the instructions that are ready to be sent to your financial institution. If there are any instructions listed that you don't want to send on the next call, right-click the instruction, and then click Don't Send on Next Call.

Displays an Electronic Payment transaction form.

Displays an Electronic Transfer transaction form.

INTERNAL USE: **More reports and chart topics below**

Switches between the report and chart views. Both view reflect the same information.

Customizes the information to be included in the report or chart and formats the way in which it is displayed.

Exports the displayed report to a file for use in another computer application, such as a word processor or spreadsheet program. The report will be exported as tab-delimited text.

Adds the displayed report or chart to a list of your favorites. Favorites give you quick access to the reports and charts you use most often.

Displays the Account Details place, where you can enter and change information about the currently-displayed investment account and see the price history of the account over the last 12 months.

Displays the Account Details place, where you can enter and change information about the currently displayed loan, see the loan's terms, or change any of the loan information.

To use the Paycheck dialog box

All the information you'll need to fill out the Paycheck dialog box can be found on your paycheck stub.

1 Click the Wages tab and enter your gross pay in the Amount column next to Wages & Salary: Gross Pay.

2 Click through the rest of the tabs entering all the information that applies to you. Be sure to enter all deductions as positive numbers. Money will deduct these amounts from your total wages. When you're finished, the Unassigned amount on the bottom left of the dialog box should equal zero and the Paycheck Total should equal the net amount of your paycheck. If you want to change the paycheck details at any time, click the Split button on the transaction form.

Notes

- If you make contributions to a retirement account through your paycheck, enter this amount in the Deductions Before Taxes tab. Do not include your employer's matching contributions. You'll be able to enter this information on the Retirement savings contributions line items of the budget.
- If you make post-tax contributions to a retirement account after you've exceeded your pre-tax contributions limit, enter these on the Deductions After Taxes tab. Set the item's Category to "Transfer," and then select the name of your retirement contributions account.

To use the Split Transaction dialog box

You can use split transactions for:

- Depositing part of a check and taking some of it in cash.
- Purchasing several items that you want to describe and keep track of separately.
- Itemizing a credit card payment.
- Itemizing your paycheck.

1 Enter the category, subcategory, description, and amount for each portion of the split. To move down one line, press ENTER, or double-click the next line.

2 When you're finished, click the Done button. "Split" is then displayed in the Category field.

If you want to return to the Split Transaction dialog box, just click the Split button again.

Tips

- If you have an unassigned amount you want to divide between all the parts of the split, press the F6 key. For example, if you've purchased several items and categorized them in a split transaction, you can divide the sales tax among all of them.
- If you're taking cash back from a deposit, be sure to include a negative sign (-) in front of the cash amount.

Check this box if you want the Value-Added Tax field to appear on the transaction form.

Displays the exchange rate as foreign units for each local unit. Choose the option that describes the applicable exchange rate.

Displays the exchange rate as local units for each foreign unit. Choose the option that describes the applicable exchange rate.

Check this box if you want to use the exchange rate you've entered here as the default exchange rate for this currency everywhere in your Money file.

Enter the amount of the transaction using the currency units displayed above this edit field.

Enter the exchange rate here.

Closes this dialog box and saves your changes.

Opens a transaction form so you can create and record a credit card payment in your Account Register.

Opens a dialog box so you can change Internet addresses for your financial institution.

Check the box if your credit card has an interest rate that expires after an introductory time period.

Select a financial institution from this list of firms that support Online Services with Money.

Lists transactions recorded in the last 60 days.

INTERNAL USE: Reports/Gallery of Reports and Charts

INTERNAL USE: Reports/Gallery of Reports and Charts/Spending Habits

Select the detail from the list that you want to apply to your report or chart.

Customizes the information to be included in the report or chart and formats the way in which it is displayed.

Defines the range of dates for this report.

INTERNAL USE: Reports/Gallery of Reports and Charts/Spending Habits/Where the Money Goes/Customize Report
DB

Applies the report parameters that you have chosen.

Resets the report parameters to the default.

Check this box if you don't want to have to confirm your Reset command.

Provides Help on this feature.

Defines the line item on each row. The line that you choose will depend on the part of your finances that you want to examine.

Defines the line item on each column. The item that you choose will depend on the part of your finances that you want to examine.

Combines all values under the designated percentage of the total. This reduces the number of transactions reported in your chart, so that you can concentrate on the larger expense items.

Allows you to sort the transactions by the amount included in each transaction.

Includes the designated abbreviation for payees and categories in your report.

Displays the chart as a report.

Displays the chart as a line chart.

Displays the chat as a pie chart.

Displays the chart as a bar chart.

Displays the chart as a stacked chart.

Displays the chart as a three-dimensional chart.

Displays gridlines in the chart.

Lets you choose which way to display the chart legend.

Removes all labels from the pie chart.

Displays percentages of the total amount as pie labels.

Displays dollar amounts as pie labels.

Includes all your accounts.

Excludes all accounts.

Includes all open accounts.

Includes all categories in your report.

Includes all income categories in your report.

Includes all expense categories in your report.

Includes tax categories in your report.

Excludes all categories from the report.

Includes all payees in the report.

Excludes all payees from the report.

Includes transactions that have no payee assigned in the report.

Finds a specific check number for the report.

Finds a specific check number for the report.

Finds a range of check numbers for the report.

Specifies the date from which checks should be included.

Specifies the date to which checks should be included.

Searches for transactions of a specific amount.

Searches for transactions of a specific amount.

Searches for transactions that contain a range of amounts.

Specifies the minimum amount to be included in the report.

Specifies that maximum amount to be included in the report.

Specifies the font for the report.

Specifies the font size for the report.

INTERNAL USE: Reports/Gallery of Reports and Charts/Spending Habits/Monthly Cash Flow/Customize Report DB

Specifies the line items on the report by row.

Specifies the line items on the report by column.

Specifies that the report should be sorted by transaction amount.

Specifies that values under a specified percentage of the total should be combined as miscellaneous items.

Excludes transfer transactions from the report.

Includes transfers to or from asset or liability accounts in the report.

Includes transfers to or from accounts that are excluded from the report.

INTERNAL USE: Reports/Gallery of Reports and Charts/Spending Habits/Category Spending/Customize Report DB

Includes the memo field in the report.

Lists the account in which the transaction occurred in the report.

Includes transactions that have cleared flag status. These are transactions that were tracked until an issue was resolved, at which point the flag was cleared.

Includes categories in report.

Includes value-added tax amounts in reports.

Specifies whether the report should start with a zero balance, the running balance or use the total of the previous transactions.

Specifies whether splits in category allocations should be included in the report.

INTERNAL USE: Reports/Gallery of Reports and Charts/What I Have/Net Worth/Customize Report DB

Shows the balance of the account on the date you specify.

Combines transactions that are less than the specified percentage of the total.

Sorts the transactions by amount.

Sorts the report by accounts.

Sorts the accounts by account type.

Sorts the reports by assets and liabilities.

INTERNAL USE: Reports/Gallery of Reports and Charts/What I Have/Account Details/Customize Report DB

Specifies that abbreviations should be included in the report.

Includes account balances in report.

Includes bank information in report.

Includes account limit in report.

INTERNAL USE: Reports/Gallery of Reports and Charts/What I Owe/Upcoming Bills/Customize Report DB

Check this option to include memo fields in the report.

Check this option to include account information in report.

Check this option to report transaction numbers.

Check this option to report categories.

From the drop-down list, choose the transactions to include in the report.

Check this option to report the transactions' category split.

INTERNAL USE: Reports/Gallery of Reports and Charts/What I Owe/Loan Terms/Customize Report DB

Includes user-defined account name abbreviations in this report.

Includes payment details in the report.

Includes transaction categories in the report.

Includes transaction abbreviations in the report.

Includes details of payment splits in the report.

Includes loan balance in the report.

Includes loan number in the report.

Includes loan type in the report.

INTERNAL USE: Reports/Gallery of Reports and Charts/What I Owe/Loan Amortization/Customize Report DB

Includes payment number in the report.

Include payees in report.

Include memo in report.

Includes payment amount in report.

Includes Principal Amount in report.

Includes interest amount in report.

Indicates the account from which the amount was paid in the report.

Includes miscellaneous loan fees in the loan report.

Includes subtotals in either quarters or years.

Includes the opening balance of the loan in the report.

Includes transaction's category splits in the report.

Includes transactions from the Account Register in the report.

Includes transactions from the Amortization Schedule in the report.

INTERNAL USE: Reports/Gallery of Reports and Charts/Investments/Portfolio value by investment/Customize Report
DB

Subtotals the account either by investment account or investment type.

Combines all values under the designated amount as miscellaneous items.

Indicates the date upon which the portfolio should be valued.

Sorts the report by amounts.

INTERNAL USE: Reports/Gallery of Reports and Charts/Investments/Performance by investment Account/Customize Report DB

Indicates whether you want to subtotal by investment account or by investment type.

Indicates that calculation details should be included in the report.

Excludes short term investment gains, to ensure that they do not distort the report.

Includes the source of the shares, whether purchased, acquired as a dividend or reinvestment

INTERNAL USE: Reports/Gallery of Reports and Charts/Investments/Investment Transactions/Customize Report DB

Includes the Memo field in the report.

Includes account field in report.

Includes transfer accounts in report.

Includes cleared flags in reports.

Includes categories in the report.

Choose the way that you would like to subtotal the report.

INTERNAL USE: Reports/Gallery of Reports and Charts/Taxes/Tax-related transactions/Customize Report DB

Choose the way that you would like to subtotal the report.

Specifies the width of the report columns.

Includes abbreviations in the tax report.

Includes summary of tax situation in report.

Includes tax transactions in report.

INTERNAL USE: Reports/Gallery of Reports and Charts/Taxes/Capital Gains/Customize Report DB

Subtotals your report by categories and category fields.

Allows you to select the investment to be included in the report.

Includes all investment accounts in the report.

Specifies the type of investment accounts that will be included in the report.

Removes all investment accounts from the report.

INTERNAL USE: Reports/Gallery of Reports and Charts/Taxes/Tax software/Customize Report DB

Includes summary of tax information in report.

Includes details of tax transactions in reports.

INTERNAL USE: Reports/Gallery of Reports and Charts/Taxes/VAT/Customize Report DB

Specifies the rows to be included in the report.

Specifies the columns to be included in the report.

INTERNAL USE: *Categories*

Sets up tax software that draws tax information from your categories.

Indicates the relevant tax form.

Indicates the relevant line of the tax form.

Indicates the relevant tax form to be used.

Includes categories in the tax reports.

INTERNAL USE: Reports and Charts [created prior to M99 rev.]

Lists all of the transactions that make up this portion of the chart.

Displays the Report/Chart Chart Gallery and creates a report based on the transactions listed here.

Type the name you want to give this Favorite Report.

Displays the report type you've selected in the left pane. If you would like to see a different group of reports, click another report type.

Automatically adjusts the report's columns to the appropriate width.

Adjusts the widths of the columns in your report.

Adjusts the widths of the columns in your report or chart.

Adjusts the widths of the columns in your report or chart.

Lists the reports available in the category selected on the left. To open a report, double-click it. To view a different list, click an option on the left.

Adjusts the widths of the columns in your report or chart.

INTERNAL USE: Report: Generic Controls

INTERNAL USE: Dates

Displays more customization options.

Displays the date range that will be covered in your report or chart. You can choose an option from the list, or enter specific dates in the From and To boxes.

INTERNAL USE: From

Specifies the starting date of the range that will be covered in your report or chart. You can also choose a date range from the list.

INTERNAL USE: To

Specifies the ending date of the range that will be covered in your report or chart.

Lists all the accounts you can include in the report or chart.

INTERNAL USE: All Transactions

Includes all transactions from the selected accounts in the report or chart.

INTERNAL USE: Select Transactions

Allows you to choose which transaction to include in the report based on type, payee, status, category, date, number, or amount.

INTERNAL USE: Subtotal By

Allows you to choose how you want to group the amounts in your report.

Allows you to group your amounts by Investment Account or investment type.

Allows you to set a minimum period of time on which your report or chart is based. This makes for more accurate reporting.

INTERNAL USE: Show Splits

Displays the split transaction breakdown for each transaction.

Displays the split transaction breakdown for each loan payment.

INTERNAL USE: Include Fields:

Adds a column to show the loan payment number.

Adds a column to show the terms of all your loans.

Adds columns to show payee, payment amount, and other fees for each loan payment.

Adds columns to show the principal and interest categories for your loans.

Adds a column to show the loan number of each loan.

Displays the payment breakdown by category.

Adds a column to display the balance remaining on each loan.

Adds a column to show whether the money from each loan was lent or borrowed.

Adds a column to display the payee of the loan.

Adds a column to display the memo text of each transaction.

Adds a column to display the memo text of each transaction.

Adds a column to display which account each transaction is transferred from.

Adds a column to display the account where the transaction originated.

Adds a column to display the account where the transaction originated.

Adds a column to display all other fees loan expenses (besides principal and interest).

Adds a column to display your classifications.

Adds a column to display your classifications.

Adds a column to display your classifications.

Adds a column to display your classifications.

Adds a column to display the transaction numbers.

Adds a column to show whether each transaction has been cleared ("C") or reconciled ("R").

Adds a column to show the category to which each transaction is assigned.

Adds a column to show the classification of each transaction.

Adds a column to show the classification of each transaction.

Displays your designated abbreviations in the report.

Adds columns to display the opening and current balances of the accounts.

Adds a column to display the bank's name and account number.

Adds a column to display the account limits.

Displays no subtotal breakdown of your balance.

Displays all of the payments you've entered so far, plus the remaining amortization for the life of the loan.

Displays all of the payments you've entered in Money so far.

Shows the default principal/interest breakdown for the loan, regardless of which payments you've actually entered.

Displays a quarterly breakdown of your account balance.

Displays an annual breakdown of your account balance.

Displays the account's opening balance at the top of the report.

Adds a column to show payment dates.

Adds a column to show payment amounts.

Adds a column to display your principal payment amounts.

Adds a column to display your interest payment amounts.

Displays a column for annual budget amounts (instead of monthly totals).

Displays additional columns for a more detailed report.

Breaks down your report amounts by categories and subcategories.

Lists your choices of column headings.

Sorts your rows in descending order according to the amount. Your reports are sorted alphabetically by default.

Combines all smaller amounts for a more concise chart.

Includes categories that have budgeted amounts but have not been used in any transactions.

Sorts your transactions by actual amounts (instead of budgeted amounts).

Sorts your transactions by budgeted amounts (instead of actual amounts).

Sorts your transactions in descending order according to the difference between budgeted and actual amounts.

Includes your investment accounts in the report.

Choose which investment accounts you want to include in the report.

Includes all of your investment transactions in the report.

Allows you to choose which investments you want represented in the report.

Specifies which of the transactions assigned to this category should appear on your tax reports.

Type the name you want for this category.

Click this if the transactions assigned to this category increase your account balances. (what's this?)

Click this if the transactions assigned to this category decrease your account balances. (what's this?)

Lists all the investment accounts you can include in your report or chart.

Lists all the loan accounts you can include in your report or chart.

Adds a column to show the source of each price update.

Provides a Balance Forecast for the next month.

Provides a Balance Forecast for the next three months.

Provides a Balance Forecast for the next six months.

INTERNAL USE: AutoBudget (dlgidAutoBudget)

Lists all your categories, divided by income and expense. Highlight the category or subcategory for which you want to enter a budget amount, and then enter the amount to the right.

Specifies the date range that will be used to set your budget amounts. You can choose an option from the list, or enter specific dates in the From and To boxes.

Specifies the starting date of the range that will be used to set your budget amounts.

Specifies the ending date of the range that will be used to set your budget amounts.

Creates your budget based on the options you've entered here.

Rounds your budget totals to the nearest whole dollar.

Rounds your budget totals to the nearest ten dollars.

Rounds your budget totals to the nearest 100 dollars.

Prevents Money from rounding your budget totals.

Creates a budget specifically for categories and subcategories that currently have no budget assigned to them.

Creates a budget for all categories and subcategories.

Creates a budget for specified categories and subcategories.

Creates a budget for the category or subcategory highlighted in the Budget dialog box.

Creates a budget based on your past records. (To get an accurate budget, you should have at least two to three months of records entered.)

Allows you to assign a yearly budgeted amount to the category or subcategory highlighted in the list to the left. Click this if you want to create a less detailed budget.

Allows you to enter a yearly budgeted amount for the category or subcategory highlighted in the list to the left.

Allows you to assign a monthly budgeted amount to the category or subcategory highlighted in the list to the left. Click this if you want to create a fairly detailed budget.

Provides a space for you to assign a monthly budgeted amount for the category or subcategory highlighted in the list to the left.

Allows you to assign a weekly budgeted amount to the category or subcategory highlighted in the list to the left. Click this if you want to create a very detailed budget.

Provides a space for you to assign a weekly budgeted amount to the category or subcategory highlighted in the list to the left.

Allows you to create a more detailed budget. This will let you break down your amounts by subcategory (instead of category).

Allows you to enter a different budgeted amount for each month. For example, you could assign a higher budget to your Gift category for the month of December if you know you're going to spend extra money on holiday gifts.

Provides a space for you to assign a customized monthly budgeted amount to the category or subcategory highlighted in the list to the left.

Excludes transfers from the report.

Shows transfers in a separate section of the report and reflects them in net income.

Shows cash inflows and outflows to or from accounts that aren't included in the report.

INTERNAL USE: Customize Tax Report (dlgidTaxSchedReport)

Includes only subtotals and no individual transactions.

Shows every tax-related transaction.

Displays the title of your report. You can change this to anything you like.

Creates a very detailed report or chart.

Creates a less detailed report or chart.

Creates a report or chart with no details.

Includes a column for your running balance (in addition to the Amount column).

Begins the Opening Balance column with the total of your prior transactions.

Begins the Opening Balance column with zero.

Includes all payments and deposits in the report.

Includes only payments in the report.

Includes only deposits in the report.

Applies your customizations to the report now displayed.

Returns your report or chart customization to the default settings.

INTERNAL USE: Widths

Sets the column width. If you have trouble fitting your report on one page, choose the Narrow option, or set your printer to use landscape orientation.

INTERNAL USE: Fonts

Click this to specify the size and style of the typeface in the report.

INTERNAL USE: Select Categories dialog box:

Removes the highlight from all items in the list. Click this if you selected some items by mistake and want to start over.

Highlights all the items in the list.

Breaks down your amounts by subcategory (instead of category).

Displays your closed accounts in the list to the right.

Lists all of Investment Accounts. Highlight the one you want to include in your report.

INTERNAL USE: TYPES OF REPORTS

Shows a list of Spending Habits reports.

Shows a list of What I Have reports.

Shows a list of What I Owe reports.

Shows a list of Investments reports.

Shows a list of Tax reports.

Shows a list of your Monthly Reports.

Shows a list of your favorite reports.

Displays the report you've highlighted above.

Displays this information as a report.

Displays this information as a bar chart.

Displays this information as a line chart.

Displays this information as a pie chart.

INTERNAL USE: the following topics were in dlgchart.rtf in the Money 98 Help project.

INTERNAL USE: VALUE-ADDED TAX REPORT CUSTOMIZATION

Displays your report with the customization you've selected.

Inserts a VAT field in your report, if VAT tracking has been enabled in the Options menu item of the Tools menu.

Resets this dialog box to the default settings.

Changes the widths (of what?) .

Changes the fonts of this report. .

Displays all transactions in the selected accounts.

Specifies which transactions you want to display for these accounts.

Allows you to choose the accounts you want to include in this report.

Allows you to choose the beginning date for this report.

Allows you to choose the end date for this report.

Allows you to choose the date range you want for this report.

Allows you to choose the interval at which you want to display information.

Allows you to choose the items that you want to appear in the rows.

Type the name you want for this report.

Resets the default options in this dialog box.

Displays your forecast including your customizations.

Changes the fonts in the forecast.

Chooses the date range you want for this report.

Specifies the date range that will be covered in your report or chart.

Specifies that you want to include only certain transactions from the Account Register.

Allows you to choose a bar chart which will allow you to compare amounts.

Allows you to choose a line chart so that you can see how an amount has changed over time.

Allows you to choose a pie chart so that you can see the proportional breakdown of a total.

Charts everything shown in your report.

Charts only the sections of the report you choose.

Lists the sections you can choose to show in the chart.

Displays your amounts side-by-side.

Displays your amounts in a single column. There are situations in which choosing Stacked makes your reports look cleaner.

Labels the slices of your pie chart by percentage.

Labels the slices of your pie chart by dollar amount.

Displays a legend containing a list of symbols and what they represent in your chart.

Displays gridlines as part of the chart.

Displays flat graphics.

Shows your actual amounts (as opposed to budgeted amounts).

Shows your budgeted amounts (as opposed to actual amounts).

Shows the difference between your budgeted and actual amounts.

Returns your report or chart customization to the default settings.

Applies your customizations to the report or chart now displayed.

Displays your pie chart without labels.

Click this to specify the size and style of the typeface in the chart.

INTERNAL USE: : Customize Report dialog for Net Worth Over Time report

Type the name you want for this report.

Choose the interval at which you want to show your balances.

Choose the date range you want for this report.

Choose the beginning date of the date range you want for this report.

Choose the end date of the date range you want for this report.

Choose the accounts that you would like to have included in this report.

Choose which Investment Accounts you want to include in this report.

Choose which loan accounts you want to include in this report.

Creates a very detailed report or chart.

Creates a less detailed report or chart.

Creates a report or chart with no details.

Applies your customizations to the report now displayed.

Returns your report or chart customization to the default settings.

INTERNAL USE: RESET BUTTON

Resets the defaults options.

Displays more customization options.

Displays more customization options.

Sets the column widths for your report.

Selects the font for your report.

Select the detail from the list that you want to apply to your report or chart.

Defines the range of dates for this report.

Includes user-defined category name abbreviations in this report.

Shows changes in your net worth over time in columns according to the selection.

Displays your total net worth only, your net worth as it is distributed among your accounts, or both depending on your selection.

Shows the distribution of your net worth by account.

Shows the distribution of your net worth by account type.

Shows how your net worth is divided between your assets and your liabilities.

Includes loan terms in this report.

Includes all investment activities.

Excludes all investment activities.

List all investment related activities.

Includes classification information relating to this classification in your report.

Specifies that values for this report are taken from your current budget.

Specifies that values for this report are taken from the budget selected.

Includes all asset accounts in this report or chart.

Includes all liability accounts in this report or chart.

Specifies which former budget you want to use for this report.

Includes classification information relating to this classification in your report.

Breaks the total net worth into assets and liabilities.

When viewed as a report, this defines the line item for each row of the report. When viewed as a chart, this defines the elements charted. What you choose here will depend on the level of detail you want to see.

When viewed as a report, this defines the line item for each column of the report. When viewed as a chart, this determines the duration over which information is charted.

Determines the sort order for the information included in the report or chart.

Combines all values under the designated percentage of the total. This reduces the number of line items in your report or elements included in your chart so that you can concentrate on the larger individual items.

Charts the actual amounts taken from your account register(s) for the categories included in your budget.

Charts the budgeted amounts for categories included in your budget.

Charts the differences between the amounts you actually recorded and the amounts budgeted for the categories included in your budget.

Select the field containing the items you want to replace.

Enter the new text you want or select an item from the drop-down list.

Click this to replace all the items displayed in the list.

Click this to replace only the items checked in the list.

The list of transactions found based on the search criteria you entered.

[Click here for more information about replacing transactions.](#)

Returns to the previous screen.

Returns to the previous screen.

Includes categories that have had no activity in your report or chart.

INTERNAL USE: **Investment Details**

Changes the name of this investment. The name will be changed throughout Money, including in the Update Price dialog box and in all transactions using this investment.

Displays the official market-approved symbol for this investment, as it is listed in newspaper indexes and stock reports. If you use Online Quotes, Money uses this symbol to determine which investment prices to update. This also serves as a shortcut name that can be used to save time when entering transactions.

Excludes transactions from this account from your tax reports. Be careful not to confuse this with accounts that are "tax deferred."

Provides a space for you to enter any comments about this investment. This is just for your own reference.

Enter the par or redemption value of the bond. This is the amount you will be paid when the bond matures. (Bonds are commonly issued with a par value of \$1,000.)

Enter the date when the bond achieves par value. This is only for your reference, and does not affect any Money calculations.

Displays the price history of an investment and allows you to manually update the market price of an investment.

Allows you to enter a split for your investments, such as a stock split. When you enter a split, Money adjusts the price and quantity to reflect the split. These changes will also be reflected in the Investment Portfolio and in the Update Price dialog box.

INTERNAL USE: **Loan Account Details**

Allows you to change the name of the loan account. The name will be changed throughout Money, including all transactions using this loan.

Enter the number of your loan account. You can find this on your loan statement.

Provides a shortcut to this loan account. If you type this abbreviation in a field, the full name will be filled in when you move to the next field.

Provides a space for you to enter any comments about this account. This is just for your own reference.

Designates this account as a favorite account. You'll then be able to go directly to this account at any time from the Go To menu in the navigation bar.

Closes the account. Closed accounts retain their transaction history, but don't show up in your account lists.

Takes you to the Account Register, where you can enter your Loan Account transactions.

Allows you to change any information for this loan, such as the interest rate, loan balance, or other fees.

INTERNAL USE: **Investment Account Details**

Displays the name and address of the financial institution with which you have this account.

Displays the number of the Investment Account. You can get this number from your brokerage statement.

Displays the name of the person you deal with at this financial institution.

Displays your contact's telephone number.

Displays your contact's fax telephone number.

Provides a shortcut to this investment account. If you type this abbreviation in a field, the full name will be filled in when you move to the next field.

Designates this account as a favorite account. You'll be able to go directly to this account at any time from the Go To menu in the navigation bar.

Closes this account. Closed accounts retain their transaction history, but don't show up in your account lists.

Displays the Account Register, where you can enter your Investment Account transactions.

Displays the details of the associated cash account for this account.

Displays the details of the associated investment account for this account.

Designates this account as a retirement account. You should update your retirement account with the Retirement Account wizard in the Account Register.

Allows you to enter your employer's contribution to your retirement account.

Provides a space for you to enter the category to which you would like to assign your employer's matching contribution amounts. For example, enter Wages & Salary in the Category field and Employer Matching in the Subcategory field.

Provides a space for you to enter the subcategory to which you would like to assign your employer's matching contribution amounts. For example, enter Wages & Salary in the Category field and Employer Matching in the Subcategory field. If you are using single-category lists, this box includes both categories and subcategories (preceded by a colon).

Changes the category assigned to the employer-matching contributions made to this Retirement Account.

INTERNAL USE ONLY: **Account Details**

Changes the account name or type. The name will be changed everywhere this account is used.

Displays the the name of this account's bank or financial institution.

Displays the number of your account. You can find this on your bank statement. If this account is set up for Online Services, you'll have to go through the Online Services Setup wizard if you want to change it.

Displays the opening balance you entered when you created this account. If you change this, it will also affect your current balance.

Displays the minimum (or maximum) balance allowed for this account. This is just for your own reference.

Displays the shortcut name for this account. If you type this abbreviation in a field, the full name will be filled in when you move to the next field.

Type any comments about this account. This is just for your own reference.

Allows you to set up this account for Online Services or change your existing Online Services information for this account.

Allows you to designate this as a favorite account. You'll then be able to go directly to this account at any time from the Go To menu in the navigation bar.

Closes this account. Closed accounts retain their transaction history, but don't show up in your account lists.

Displays the Account Register for this account. Click this if you want to add transactions to this account.

Displays the Online Financial Services place for this account.

INTERNAL USE ONLY: **Category Details**

Renames the item selected in the left pane. The new name will be used in all transactions that currently have name assigned to them.

Create a new subcategory for this category or a new subclass for this class.

Lists the subcategories or classification subclasses assigned to this category or classification.

Provides a shortcut name for the item selected. If you type this abbreviation in a field, the full name will be filled in when you move to the next field.

Type any comments about this item. This is just for your own reference.

Includes the transactions assigned to this category or subcategory in your tax reports. For example, if the transactions assigned to the category or subcategory are tax deductible, it would be useful to include them in your tax reports.

Lists the available tax forms to which transactions using this category or subcategory will be assigned. This will be helpful if you plan to export your data to a tax software program.

Lists the lines that are available for the tax form chosen above. All transactions with this category or subcategory will be assigned this tax form line. This is especially helpful if you plan to export your data to a tax software program.

Provides a space for you to record the copy of the tax form you're using. Most often the number will be 1. However, if you're using multiple forms, such as W-2s or Schedule Cs, this number will be greater.

Displays your budget or creates one if you have not already done so. Money budgets are based on your spending per category or subcategory.

INTERNAL USE ONLY: **Payee Details**

Allows you to change any of the Online Bill Payment information for this payee.

Renames the payee. The name will be changed in all transactions using this payee.

Changes the address for this payee. This is also the address that Money will use if you send online payments to this payee. Use the second line if you need more room.

Type address of this payee. This is just for your own reference.

Type the address for this payee. This is also the address that Money will use if you send online payments to this payee. Use the second line if you need more room.

Enter the city of this payee's . This is also the address Money will use if you send online payments to this payee.

Enter the two-letter abbreviation for this payee's state or province. This is the address Money will use if you send online payments to this payee.

Enter the five- or nine-digit ZIP code (or 6-digit postal code) for this payee. This is also the address that Money will use if you send online payments to this payee.

Enter the phone number for this payee. You can also click the Dial button to have Money dial the number for you.

Dials the number for this payee.

Type your account number, if you have an account number with this payee. If you send electronic payments to this payee, this account number will also appear on the check.

Creates a shortcut for this payee. If you type this abbreviation in a field, the full name will be filled in when you move to the next field.

Type any comments about this payee. This is just for your own reference.

Choose your filing status.

Choose the type of checks you want to print.

INTERNAL USE ONLY: **Restore Backup Dialog**

Allows you to search for the location of the file you want to restore.

Enter the path to the file that you want to restore. Click the Browse button to search for the path.

Choose Automatic Entry only if this recurring transaction is set up to be processed automatically by your financial institution. Automatic transactions involve an arrangement with your financial institution, not your Money online bill payment service, and don't require the use of online banking or bill payment. The Automatic Entry method is simply a way of having Money automatically enter a recurring automatic transaction into your Account Register each month, without any need for intervention on your part. Select Automatic Entry as the entry method, and leave the Number field blank. For more information, type "Automatic Entry Method" in the Search field at the bottom of the Help pane, and click Search.

For all other recurring transactions, including Epays and Apays, select Manual Entry.

Lists scheduled transactions. (You can choose what's listed by clicking the triangle in the view bar, above.)

- If you want to see how a transaction will affect your account balance, select the transaction by clicking the check box to its left, then look in the New Balance After Entering column on the right.
- You can change the widths of the columns by clicking a dividing line in the column heading, then dragging the line.
- When you have selected the transactions you want to enter into the Account Register, click Enter Now, below. You'll get a chance to edit each transaction before adding it to the register.

Tells you more about Electronic Payment dates.

Tells you more about Electronic Transfer dates.

Lists all your categories. Choose the category that you would like to apply to your employer's matching contributions.

Lists all of your subcategories. Choose the one that you would like to apply your employer's matching contributions. If you are using single-category lists, this box includes both categories and subcategories (preceded by a colon).

Type the designated name for this bank.

Check this box if you don't want to see this information when entering Electronic Payments in the future.

Check this box if you don't want to see this information when entering Electronic Transfers in the future.

Provides a list of transactions that have cleared your bank.

Provides a list of transactions that were sent to your financial institution during this connection.

Contains the messages from your financial institution. If you want to save them, click the Save Messages button above.

Provides a list of transactions that were sent to your financial institution during this connection.

Provides a list of transactions downloaded during the connection. Click Update Account Register to add them to your Account Register.

Saves this Call Summary information in a text file.

Closes this window. If you want to save your Call Summary information in a text file, click the Save Messages button.

Check this check box if you don't want to be reminded of this again.

Type the name that you would like for this Loan Account.

Type the name you want for this category.

Type the new name you want for this item.

Type the name you want to assign to this class.

Type the name that you want to assign to this subclass.

Indicates that the transactions assigned to this category increase your account balances.

Indicates that the transactions assigned to this category decrease your account balances.

Use bank accounts to track all the accounts at your bank, including checking and savings.

INTERNAL USE ONLY: **Create New Recurring Payment**

Creates a recurring bill, such as a utility payment.

Creates a recurring deposit, such as a paycheck.

Creates a recurring transfer, such as a regular transfer to a credit card account.

INTERNAL USE ONLY: **New Account Setup Wizard**

Provides a space for you to type your account's current balance.

Creates an associated cash account to record any cash you have in your brokerage account.

Indicates that no cash account should be set up for this investment account.

Creates a monthly reminder to pay this bill in the Bill Calendar.

Type your best guess at your monthly credit card payment. You'll be able to change this before it's entered in the Account Register.

Type the date that your next credit card payment is due.

Lists all the accounts you can include in your report.

Type the name of your account.

Includes all transactions from this account in Money's tax reports.

Excludes transactions from this account in Money's tax reports. Tax-deferred accounts include 401(k)s, IRAs, and SEPs.

Indicates the type of account you want to set up. See the description for the highlighted account type below.

Lists the accounts to which you can move this transaction.

Lists all your categories, divided by income and expense.

Lists all the accounts that you can include in your search. Highlight those you want to include.

Lists all the loan accounts that you can include in your search. Highlight those you want to include.

Lists all the loan accounts that you can include in your search. Highlight those you want to include.

Includes all accounts in your search. Choose this to highlight all the accounts to the right.

Includes all your loan accounts in your search. Choose this to highlight all the accounts to the right.

Includes closed accounts in the account list to the right.

Includes your closed loan accounts in the list to the right.

Includes your closed loan accounts in the list to the right.

Limits your search to what's highlighted in the list to the right.

Limits what's displayed to the highlighted loan accounts in the list to the right.

Includes all open accounts in your search. Choose this to highlight only the open accounts to the right.

Lists all of the categories you can include in your search. Highlight those you want to include.

Includes all categories in your search. Choose this to highlight all the categories to the right.

Limits your search to the categories highlighted in the list to the right.

Highlights all the income categories in the list to the right.

Highlights all the expense categories in the list to the right.

Highlights all the tax-related categories in the list to the right.

Limits your search to transactions that have no category assigned to them.

Displays subcategories in the list so that you can also limit your search to specific subcategories.

Includes all classes in your classification in the search. Highlights all the classification classes in the list to the right.

Highlights only the classification classes that you select in the list to the right.

Limits your search to those transactions that have no classification class assigned to them.

Lists all the classification classes you can include in your search. Highlight those you want to include.

Displays subclasses in the list so that you can also limit your search to specific subclasses.

The transaction date range that will be covered in the search. You can choose an option from the list, or enter specific dates in the From and To boxes.

Indicates the starting date of the range that will be covered in your search. You can also choose a date range from the list.

Indicates the ending date of the range that will be covered in your search.

Allows you to choose the type of transactions to be included in your search.

Allows you to limit your search based on the reconciled status of the transactions.

Indicates the starting point of the transaction numbers to which your search is limited.

Indicates the ending point of the transaction numbers to which your search is limited.

Indicates the starting point of the transaction amount to which your search is limited.

Indicates the starting point of the transaction amount to which your search is limited.

Indicates the ending point of the transaction amount to which your search is limited.

Indicates the ending point of the transaction amount to which your search is limited.

Allows you to limit your search based on investment activity.

Allows you to limit your search based on investment type.

Lists all the payees you can include in your search. Highlight those you want to include.

Uses all the payees in the list to the right in your search.

Allows you to limit your search to transactions that are to or from the payees highlighted in the list.

Allows you to limit your search based on the reconciled status of the transactions.

Limits your search to those transactions that have no payee assigned to them.

Type the text or number for which you want to search. Money will search through all fields.

Starts the search for the items that meet the criteria that you specified above.

Closes this dialog box without saving any changes you have made.

Indicates the starting point of the investment transaction amount to which your search is limited.

Indicates the ending point of the investment transaction amount to which your search is limited .

INTERNAL USE ONLY: **Select Transactions**

Choose the investment activities you want to include in your report or chart.

Choose whether you want to limit your report or chart to display either reconciled or unreconciled transactions.

Indicates the beginning date of the range that will be covered in your report or chart.

Indicates the ending date of the range that will be covered in your report or chart.

Type the lowest amount of the range that will be covered in this report or chart. If you don't want to limit your report or chart by amount, leave this field blank.

Type the highest amount of the range that will be covered in this report or chart. If you don't want to limit your report or chart by amount, leave this field blank.

INTERNAL USE ONLY: **Select Investment Activities**

Lists all of the activities you can include.

Highlights all of the investment activities in the list.

Clears all of the activities in the list. For example, click this if you selected some items by mistake and want to start over.

INTERNAL USE ONLY: **Zero Transaction dialog**

Returns you to the transaction if you want to enter a different amount.

Allows you to enter the transaction with the amount as zero.

Allows you to enter the transaction and mark it as void.

Allows you to cancel this transaction and start over.

Prints the entire report.

Enter the number of copies that you would like to print.

Enter the number of copies that you would like to print..

Specify the required printing resolution., in dots per inch (dpi). Higher-resolution settings produce higher-quality printing, although your documents may take longer to print.

The resolutions available depend on your printer's capabilities.

Specify the required printing resolution, in dots per inch (dpi). Higher-resolution settings produce higher-quality printing, although your documents may take longer to print.

The resolutions available depend on your printer's capabilities.

Displays the Print Setup dialog box, where you can set up another printer, or change your printer properties.

Displays the Print Setup dialog box, where you can set up another printer, or change your printer properties.

Type the page numbers of the pages that you want to print.

Type the page numbers of the pages that you want to print.

Type the page numbers of the pages that you want to print.

Check the Collate option to print multiple copies of a document. A complete copy of the document is printed before the first page of the next copy is printed.

Online Services Setup: matching accounts

Allows you to specify which Money account corresponds to each online account at your bank. This is necessary so that downloaded transactions can be matched with any you might have already manually entered.

The account names don't necessarily need to match. You can name the account anything you want in Money. For example, you might have the name "Rose's Checking," whereas the bank will list simply "Checking."

If you've entered an account number in Money, you can use this as a guide to which Money account the downloaded one matches.

If you haven't yet set up an account in Money for the account downloaded by the bank, click the New button.

INTERNAL USE ONLY: **CLASSIFICATIONS**

Type the name you want for this account.

Indicates that this is a credit card account.

Indicates that this is a cash account.

Indicates that this is an asset account.

Takes you to the account details place.

Takes you to the Account Register.

INTERNAL USE ONLY: **Categories and Payees**

Click the triangle to see a list of views you can choose.

Lists your payees, categories, or classification classes. The list you see here depends on the item selected at the left.

Takes you to the details screen, where you can view and edit information.

Displays the list of categories.

Displays the list of classification classes, if you are using this classification.

Displays the list of classification classes, if you are using this classification.

Creates a new entry.

Moves the highlighted entry.

Renames the highlighted entry.

Lists the transactions for this for this payee or category.

Displays your list of payees.

Choose the concept that most closely matches what this category is used for.

Deletes this classification.

INTERNAL USE ONLY: **FIND DIALOG FIND BUTTON**

Starts the search.

INTERNAL USE ONLY: **BILL CALENDAR (the calendar itself)**

Moves the arrows forwards and backwards through the calendar. The transactions scheduled for the date you've chosen appear in the Bills list.

INTERNAL USE ONLY: **INVENTORY DETAILS** dialog

Lists the types of assets you can track in the Home Inventory worksheet. Choose the type that best fits the item you are tracking.

Enter a name for this item.

Enter the place where this item is stored.

Enter the current value of this item. The current value is the amount for which you could sell it, or the depreciated cost. If you need to make a calculation, click the triangle to open a calculator.

Type any comments that you have for this item. This is just for your own reference.

Enter the replacement value of this item. If you need to make a calculation, click the triangle to open a calculator.

Enter the serial number of this item.

Enter the price you paid for this item. If you need to make a calculation, click the triangle to open a calculator.

Enter the place where you purchased the item.

Enter the date upon which you purchased this item.

Enter the make and model number of this item.

INTERNAL USE ONLY: **BILL CALENDAR**

Click a date to see all of the bills, deposits, and transfers you have scheduled for that day. Click the arrows to move forward and backward through the calendar.

INTERNAL USE ONLY: **Date field in Asset Account Details**

Enter the date that you purchased this asset.

INTERNAL USE ONLY: **VAT Rate field in Category Details**

Type the Value-added tax (VAT) rate for this item, if applicable. VAT is charged in many European countries.

Placeholder for audio icon in the Customize Report dialog.

Use this field to ask a question about how to do things in Money or about the financial management concepts used in Money. Type your question in your own words using regular language.

Hides this dialog in the future when it would otherwise occur.

Submits your question to Money Help. Money then searches through all of its help topics and returns a list of the ones most likely to answer your question. Just click a topic in the list to view its contents.

INTERNAL USE ONLY: Currency List (dlgidOptCurrencies)

Lists the currencies you can work with in Money.

Indicates the last exchange rate used for the highlighted currency.

Displays the exchange rate as local units for each foreign unit. Choose the option that describes the applicable exchange rate.

Displays the exchange rate as foreign units for each local unit. Choose the option that describes the applicable exchange rate.

Indicates the last exchange rate used for the currency selected above.

Creates a new currency to be added to the list.

Deletes the highlighted item from the list.

Allows you to rename the highlighted currency.

Displays the exchange rate as local units for each foreign unit. Choose the option that describes the applicable exchange rate.

Displays the exchange rate as foreign units for each local unit. Choose the option that describes the applicable exchange rate.

INTERNAL USE ONLY: Create New Currency dialog

Type the name you want for the new currency.

Type the new name you want for the currency. This new name will replace the old throughout Money.

INTERNAL USE ONLY: Currency Converter dialog

Indicates the amount that is being converted to a different currency.

Lists all the currencies Money supports.

INTERNAL USE ONLY: Place Details Fields

Goes to the next transaction without entering this one into the Account Register.

Displays your balance forecast over the coming month based on the transactions you've entered above. Click this menu bar if you want to change which accounts are displayed in this chart.

Enters the scheduled bill, deposit, or transfer into your Account Register. You can make any changes you want now.

Creates an income category, such as Wages & Salary or Investment Income.

Creates an expense category, such as Food or Healthcare.

Includes the transactions assigned to this category or subcategory in your tax reports. For example, if the transactions assigned to this category or subcategory are tax deductible, they should be included in your tax reports.

Won't include the transactions assigned to this category or subcategory in your tax reports.

Creates a category or classification. You can also create these when entering transactions by simply typing the new name in the appropriate field of the Account Register.

Creates a subcategory or classification subclass. You can also create these when entering transactions by simply typing it in the appropriate field of the Account Register.

Type the name you want for the new item.

Lets you attribute each transaction to a family member so that later you can compare spending habits in reports.

Allows you to track expenses so that you can later make comparisons in reports. For example, if you have multiple rental properties or multiple apartments, you can track your expenses by unit.

Allows you to track the expenses for a special project separately from the rest of your records.

Allows you to track the expenses for a hobby separately from the rest of your records.

Allows you to track your vacation expenses separately from the rest of your records.

Allows you to track job expenses separately from your personal expenses.

Type the name you want for this classification.

Type the new name you want for this classification. This name will be used wherever the old name appeared.

Allows you to create your own type of classification.

Type the name you want for this payee.

Type the name you want for your new payee.

Lists all your categories or classifications.

Lists all your categories or classifications.

Lists all your subcategories or classification subclasses. If you are using single-category lists, this list includes all of both your categories and subcategories (preceded by a colon).

Lists the payees that use this same name. Highlight a payee and then use the information displayed to the right to determine which one you want.

Specifies if the transactions assigned to this subcategory should appear on your tax reports.

INTERNAL USE ONLY: Move Transaction dialog box

Lists all of your existing categories.

Lists all of your existing subcategories. If you are using single-category lists, this list includes all of both your categories and subcategories (preceded by a colon).

Hides or displays Money's transaction forms. The transaction forms can be used to enter transactions from your account statement.

INTERNAL USE ONLY: HOME INVENTORY WORKSHEET

Lists all of all the items you've entered in the inventory.

Lists all of the appliances you've entered in the inventory.

Lists all of the art you've entered in the inventory.

Lists all of all the books and music you've entered in the inventory.

Lists all of the clothing you've entered in the inventory.

Lists all of the collectibles you've entered in the inventory.

Lists all of the electronics you've entered in the inventory.

Lists all the furnishings you've entered in the inventory.

Lists all the hobbies you've entered in the inventory.

Lists all of all the jewelry you've entered in the inventory.

Lists all of all the office equipment you've entered in the inventory.

Lists all other items you've entered in the inventory.

Lists all of all the recreation you've entered in the inventory.

Lists all of the sports you've entered in the inventory.

Lists all of the tools you've entered in the inventory.

Lists all of the vehicles you've entered in the inventory.

Displays the items you've entered for this category of the inventory. To make changes, click the Details button.

Adds this item to the inventory.

Makes another copy of the highlighted item. This is a fast way of entering several similar items. You can edit the copy by clicking Details.

Makes changes to the highlighted item.

Deletes the highlighted item from the inventory.

Moves the calendar back in time one month.

Moves the calendar ahead in time one month

Lists the recurring transactions scheduled for or recorded on the selected day.

Records the selected transaction(s) in the appropriate Account Register(s). You will be able to edit the details of each transaction selected prior to entering it. If this is an E-bill, clicking this button takes you to your E-bill Web site.

Allows you to edit the details of this transaction.

Allows you to skip this individual payment, deposit, transfer, or investment purchase.

Creates a new deposit, bill, transfer or investment purchase.

Allows you to edit the details of this recently recorded transaction.

Allows you to change the date range for which upcoming transactions are displayed.

Enter the name of the folder you want to put all your favorite Web links in.

Enter the name of the Web site you want to add to your Favorites List.

Select this option to rename the payee.

Select this option if you don't want to rename the payee, but just change the name for the transactions you've found.

Returns to the previous screen.

Enter the lowest amount for which you want to search.

Specifies whether you want to include closed accounts in your search.

Choose the loan account for which you want to search.

Allows you to postpone adding these transactions to your Account Register.

Attaches this Call Summary information to the end of the existing file.

Overwrites the existing file with the new Call Summary information.

Lists all the information that was received during your online call.

Copies your Call Summary information to the Windows Clipboard, so that you can paste it into another program.

Saves your Call Summary information as a text file for your records.

Lists all of the investments for which you've entered a market-approved symbol.

To add investments to the list, highlight the investment in the Investment Portfolio, click the Go To button, then type your entry in the Symbol field.

Updates the market prices of the selected investments.

Indicates that both transactions represent the same transaction.

Indicates that both transactions do not represent the same transaction.

Returns to the previous dialog box.

Starts the search for the items specified above.

Returns all of the search options to their default settings so that you can do another search.

Displays the Report/Chart Gallery and shows an Account Transaction report with all the transactions that match your search criteria.

Displays the Change Category dialog box, where you can assign all the transactions you highlighted below to a different category.

INTERNAL USE ONLY: **Change Category dialog box**

Assigns a category to the selected transactions if they have no category assigned to them.

Lists all your categories and subcategories.

INTERNAL USE ONLY: **Category Options (dlgidOptCategories)**

Restores Money's Standard Categories to the available list of categories. If you imported the file from another program, Money's Standard Categories might not have been added to your list.

Removes all unused categories from your category list.

Asks you for confirmation before removing each unused category as requested when you click the Remove button above.

Displays a warning if you enter a transaction without assigning a category to it.

Specifies whether Value-Added Tax is supported.

Displays a warning if you mistakenly enter an Income category for an expense or an Expense category for income.

INTERNAL USE ONLY: **Editing Options (dlgidOptEditing)**

Automatically fills in a previously entered payee name after you have typed one or more characters in the Payee field.

Automatically displays the list of categories when you place the cursor in the Category field.

Automatically adds the decimal point when you type a transaction amount.

Moves you from one field to the next when you press the ENTER key (instead of the TAB key).

Automatically opens a new, empty form when you enter a transaction in the Account Register. This can be useful if you're entering a number of transactions at once and don't want to click the New button each time you enter another transaction.

Gives you a selection of customized forms that can be used in the Account Register when entering your transactions. Uncheck this box if you want to enter your transactions directly into the Account Register.

Displays a confirmation before a transaction is entered so you can accept or cancel the entry.

Uncheck this box if you don't want Money to make any extra sounds.

Displays a message when you use a new payee, asking if you want to add it to the payee list.

Displays a warning when you try to change a transaction that is already reconciled.

INTERNAL USE ONLY: **General Options (dlgidOptGeneral)**

Displays forms for entering transactions in the Account Register, instead of displaying only the register.

Displays a message when you close Money, asking if you want to create a backup file.

Lists all Money's main areas. Choose the place you want to go to automatically when entering Money. You can also choose to automatically go to the last place you used.

Displays your on-screen charts in color instead of two-dimensional patterns.

Prints your reports in color instead of two-dimensional patterns.

Lists Money's automated file backup options.

INTERNAL USE ONLY: **Tax Options**

Type the deduction cutoff amount.

Type the exemption cutoff amount.

Type the amount of the deduction for being over 65 years old.

Type the amount for the standard exemption.

Type the amount of the deduction for being blind.

Type the amount of the standard deduction.

Type the percent at which long-term capital gains are taxed.

Enter the rate at which this income is taxed.

Enter the rate at which this income is taxed.

Enter the rate at which this income is taxed.

Type the amount of the upper limit of this tax bracket.

Type the amount of the upper limit of this tax bracket.

Enter the rate at which this income is taxed.

Type the amount of the upper limit of this tax bracket.

Enter the rate at which this income is taxed.

Type the amount of the upper limit of this tax bracket.

INTERNAL USE ONLY: **Payment Calendar Options (dlgidOptPayBills)**

Specifies when you would like to be reminded of pending bills.

Includes only business days when reminding you of upcoming bills.

Allows you to specify the first day of your calendar week.

Watches for repeated transactions and asks if you want to add them to the Bill Calendar.

Shows only debited accounts for transfers in the Bill Calendar.

INTERNAL USE ONLY: **Print Checks Options (dlgidOptPrintChecks)**

Displays a message when any of the checks you are printing are post-dated. Money then gives you the option to print them using either today's date or the original date.

Prints the payee name on checks as the first line in the address field.

Indicates the vertical printing offset number. See the instructions below the boxes.

Indicates the horizontal printing offset number. See the instructions below the boxes.

Indicates the vertical printing offset number. See the instructions below the boxes.

Indicates the horizontal printing offset number. See the instructions below the boxes.

Allows you to continue printing with Quicken checks if you have converted from Quicken.

INTERNAL USE ONLY: **Currencies Options**

Enter the symbol of the currency to be renamed.

Enter the symbol of the new currency to be created.

Set your default currency for Money accounts. This currency will be used when determining exchange rates.

Reminds you of payments that are coming due. Each time you start Windows, you can look in the status bar to see if you have any bills due.

Password-protects your Bill Reminder notification. This will prevent others from being notified when your payments are due.

Choose this option if you would like to be asked for the Bill Reminder password once per Windows session. This can save you from entering your password repeatedly.

INTERNAL USE ONLY: **Online Services Options**

Automatically updates service offerings from your financial institution on every Internet connection.

Automatically updates mortgage and tax rates on every Internet connection.

Automatically updates headlines and Internet updates from Money Insider at every Internet connection.

Automatically updates stock quotes and news from Investor on every Internet connection.

Prompts you to confirm every transaction Money downloads. This method takes a little more time, but gives you more control and enables you to add memos and to categorize each transaction.

Indicates the range of dates through which Money will search when matching the bank's transaction records with your Money transaction records. For example, if you type 30 as the number of days, Money will automatically match transactions that have cleared the bank within 30 days of the date you entered for the transaction in Money.

Enters the bank or credit card company's transaction details into the Memo field of your Money records. If you already have an entry in the Memo field, the transaction details will be added to it. These details can include the posting date at your bank, the address of the ATM, or a description of a bank fee, depending upon the information provided by the bank.

INTERNAL USE ONLY: **Specify Date Range (dlgidPayBills)**

INTERNAL USE ONLY: **Adjust Account Balance (dlgidBalOtherAcct)**

Begins balancing your account against your statement.

Indicates the ending balance of the period you're balancing.

Indicates the end date of the period you're balancing.

Lists the categories to which you can assign the adjustment transaction.

Lists the subcategories to which you can assign adjustment transaction.

INTERNAL USE ONLY: **Account Didn't Balance (dlgidDidntBal)**

Returns you to the Account Register so that you can find and fix the problem. You can modify existing transactions, mark them as cleared, or add any previously omitted transactions.

Returns you to the Account Register so that you can find and fix the problem. You can modify existing transactions, mark them as cleared, or add any previously omitted transactions.

Allows Money to search for the transaction that is causing the problem.

Automatically adds an adjustment transaction to balance your account.

Automatically adds an adjustment transaction to balance your account.

Completes the balancing of your account without resolving the starting balance difference. If you choose this option, you will probably still have the problem next time you balance.

Indicates the difference between Money's account balance and the balance you entered from your bank statement.

Lists the categories that can be assigned to the adjustment transaction.

Lists the categories that can be assigned to the adjustment transaction.

Lists the subcategories that can be assigned to the adjustment transaction.

If you are using single-category lists, this box indicates both the category and subcategory (preceded by a colon) that can be assigned to the adjustment transaction.

Lists the subcategories that can be assigned to the adjustment transaction.

If you are using single-category lists, this box indicates both the category and subcategory (preceded by a colon) that can be assigned to the adjustment transaction.

INTERNAL USE ONLY: **Balance Account (dlgidBalance)**

Indicates the end date of the period covered by the statement.

Indicates the beginning balance listed on your statement.

Indicates the ending balance listed on your statement.

Lists the service charges on your bank statement. Service charges might also include ATM charges, check fees, and other account fees.

Specifies the expense category for your bank's service charge. Typically, this will be Bank Charges.

Indicates the subcategory for the service charges applied to this account for the balance period.

If you are using single-category lists, this box indicates the category and subcategory (preceded by a colon) for these service charges.

States the interest earned or charged on this account. This is probably listed on your account statement.

Indicates the category for the interest earned or charged on this account during the balance period.

Indicates the subcategory for the interest earned or charged on this account during the balance period.

If you are using single-category lists, this box indicates the category and subcategory (preceded by a colon) for the interest earned or charged.

Completes the balancing process. If there's a remaining balance in step 2, you'll be given some options on how to resolve the discrepancy.

Saves the balancing information you've entered so far and allows you to resume balancing later.

INTERNAL USE ONLY: **Possible Error (dlgidPossibleError)**

Indicates the payee for the transaction that might have caused the error.

Indicates the amount of the transaction that might have caused the error. Make sure you haven't incorrectly entered the amount or misplaced the decimals.

Indicates the type of transaction that might have caused the error.

Indicates whether the transaction is listed as cleared or outstanding on the statement.

Indicates the date upon which the transaction was entered.

Displays the category assigned to the transaction.

INTERNAL USE ONLY: **Find (dlgidFind)**

Provides a list of transactions that have met the search criteria entered above. If you would like to see these transactions compiled into a report, click the Create a Report button above.

INTERNAL USE ONLY: **Find Transaction dialog**

Type the text for which you want to search.

Specifies that you want to search all accounts.

Specifies that you want to choose specific accounts to search. Highlight the accounts you want to search in the list to the right.

Specifies that you only want to search open accounts.

Specifies whether you want to search closed accounts.

Choose the date range you want to search.

Type the date from which you want to start searching.

Type the date up to which you want to search.

Specifies that you want to search all categories.

Specifies that you want to search only certain categories. Highlight the categories you want to search in the list at the right.

Specifies that you only want to search Income categories.

Specifies that you only want to search Expense categories.

Specifies that you only want to search Tax categories

Clears all highlighted categories in the list.

Specifies whether you want to show subcategories.

Lists the corresponding categories of the option selected to the left.

Specifies that you want to search all payees.

Specifies that you only want to search certain payees. Highlight the payees you want to search in the list.

Clears the list of payees.

Choose the type of transactions you want to search.

Choose the status of the transactions you want to search.

Type the amount at which you want to start searching.

Type the amount at which you want to stop searching.

Clears the tabs of this dialog box so that you can start a new search.

Displays the Reports place with the results of your search displayed.

Lists all the payees that Money will search.

Enter the number from which you want to start searching.

Enter the number up to which you want to search.

Enter the amount up to which you want to search.

Enter the amount from which you want to start searching.

Lists all off the accounts to be searched by Money.

Displays the Categories tab, where you can change category options.

INTERNAL USE ONLY: **Topics for Find Investment Transactions**

Choose the types of activities that you would like to search.

Choose the types of investments you want to search.

Choose the status types you want to search.

Type the amount from which you want to start searching.

Type the amount at which you want to stop searching.

Highlight the account you want to search.

INTERNAL USE ONLY: **Spend or Receive (dlgidSpendReceive)**

Lists all classes and subclasses for this classification.

Subtracts the amount from your account balance.

Adds the amount to your account balance.

Halts notification of any recurring payments you enter.

INTERNAL USE ONLY: **VISA DLL Context Help**

This is a test. If you see this, happiness abounds.

This is a test. If you see this, happiness abounds.

INTERNAL USE ONLY: **Show me advice from Advisor FYI (on General tab of Options dialog)**

Select this to receive personalized guidance from Advisor FYI.

INTERNAL USE ONLY: **Planner tab**

Type the amount you want to use to calculate yearly inflation.

Specifies that you want Money to calculate your tax rate from the Tax Worksheet.

Specifies that you want to use the percentage rate you enter.

Type the average tax rate you want Money to use.

Resets your Debt Reduction Plan to its original state, thereby erasing any data you've entered. Once you've reset your debt plan, you can start creating a new one.

Select the type of accounts you want to search.

Use this option to search your accounts on one element at a time.

Use this option to search your accounts on many elements at once.

Includes all classes and subclasses of this classification in this report or chart.

Excludes all classes and subclasses of this classification from this report or chart.

Specifies whether you want to show subclasses in the above list.

Sets the colors used across Money.

Sets the first day of the calendar week in Money.

Opens the Windows Sounds Properties dialog box where you can change the sounds used by Money to signify different events and actions.

Turns audio help topics that have already been heard back on for all areas of the program.

Lists the different types of information available that can be displayed on your Financial Home Page. Checked items are displayed in the order in which they appear in the list.

Moves the selected item up in the list to the left. Checked items are displayed in the order in which they appear in the list.

Moves the selected item down in the list to the left. Checked items are displayed in the order in which they appear in the list.

Prevents your name from being displayed on your Financial Home Page.

Opens the Advisor FYI Options box, in which you can turn on Advisor FYI and Advisor FYI Alerts, as well as specify which data will trigger Advisor FYI Alerts. For example, you can ask Money to notify you when your checking account balance goes below a certain amount.

Opens the Select Financial Reading dialog box where you can select the headline subjects and publishers that will appear on your Financial Home Page.

Opens the Select Chart of the Day dialog box where you can select which charts will appear on your Financial Home Page.

Tells Money that you want to get Advisor FYI Alerts or Advisor FYI on one or more subjects. Check the categories that interest you. If you check any of the first four categories, also click the corresponding tab for that category and set the limits you want.

Tells Money that you want Advisor FYI to appear on your personalized Financial Home Page. To have Money generate the information you want, check the options above for all Advisor FYI categories (Reducing Debt, Investing, Home and Mortgage, Budgeting, and Taxes) you're interested in.

Specifies the account you want to set limits for.

Check this to have Money let you know when your account balance for the selected account is above a certain level (or, for credit card accounts, when you owe more than a certain amount). Once you've checked the option, Money lets you enter an amount.

Enter an amount to tell Money to let you know when your account balance for the selected account is above a certain level (or, for credit card accounts, when you owe more than a certain amount).

Check this to have Money let you know when your account balance for the selected account is below a certain level (or, for credit card accounts, when you owe less than a certain amount). Once you've checked the option, Money lets you enter an amount.

Enter an amount to have Money let you know when your account balance for the selected account is below a certain level (or, for credit card accounts, when you owe less than a certain amount).

Specifies the category (and subcategory) you want to set limits for.

Check this to have Money let you know when your spending for the selected category goes above a certain amount. Once you've checked the option, Money lets you enter an amount.

Enter the amount above which Money will trigger an Advisor FYI Alert. Before you can enter an amount, you must check the corresponding box.

Tells Money that you want to see a chart of your spending in this category on your personalized Financial Home Page.

Enter the date you want the reminder for this event to appear every year.

Opens a box in which you can enter an event and the date on which you want a reminder to appear every year.

Allows you to edit the name or reminder date for the selected event.

Deletes the selected event and the yearly reminder you created for it.

Specifies the investment you want to set limits for.

Check this to have Money let you know when the price of your investment reaches a certain high amount. Once you've checked the option, Money lets you enter an amount.

Check this to have Money let you know when the price of your investment reaches a certain low amount. Once you've checked the option, Money lets you enter an amount.

Enter the high investment price which Money will trigger an Advisor FYI Alert. Before you can enter an amount, you must check the corresponding checkbox.

Enter the low investment price which Money will trigger an Advisor FYI Alert. Before you can enter an amount, you must check the corresponding option.

Automatically creates a backup file in a location on your hard disk every time you close Money.

Specifies the location of the backup file saved to your hard disk.

Opens the Backup dialog box so you can browse your computer for the location of your backup file.

Prompts you for confirmation before creating a backup file to the specified location.

Compresses your backup file to save disk space.

Creates a backup file on a removable disk automatically as often as is specified.

Specifies how often Money creates the backup file on your removable disk.

Specifies the location of the backup file saved to your removable disk.

Compresses your backup file to save disk space.

Updates investment news and price information from Microsoft Investor whenever you connect to the Internet in Money.

Updates news headlines on your Financial Home Page and downloads Internet updates whenever you connect to the Internet in Money.

Updates mortgage and tax rates from Money Insider whenever you connect to the Internet in Money.

Makes an Internet connection the first time you start the program on any given day.

Prompts you before it makes any attempt to connect to the Internet.

Money won't break your connection to the Internet until you either disconnect manually or close the program altogether.

Opens the Microsoft Internet Explorer Internet Properties dialog box to the Connection tab so that you can modify the way Money connects to the Internet.

When selected, Money uses its internal Web browser to access Web pages.

When selected, Money uses your default Web browser to access Web pages.

Applies keyboard short cuts valid in Quicken 98 and later to Money.

[Click here to set the time period you want Money to use when calculating capital gains.](#)

Enter the number of days, months, or years you want.

Click the down arrow to specify days, months, or years.

Enter the number of days, months, or years you want.

Click the down arrow to specify days, months, or years.

Select the category to which you want realized capital gains or losses assigned.

Select the subcategory to which you want realized capital gains or losses assigned.

If you are using single-category lists, this box lists both the category and subcategory (preceded by a colon) that can be assigned to realized capital gains or losses.

Select the category to which you want capital gains distributions assigned.

Select the subcategory to which you want capital gains distributions assigned.

If you are using single-category lists, this box lists both the category and subcategory (preceded by a colon) that can be assigned to capital gains distributions.

Select the category to which you want employee stock option gains assigned.

Select the subcategory to which you want employee stock option gains assigned.

If you are using single-category lists, this box lists both the category and subcategory (preceded by a colon) that can be assigned to employee stock option gains.

Click this if you want Money to display the market value of all the stock option shares you've been granted, including unvested shares.

Click this if you want Money to display the market value of only the stock shares you've vested.

Tells Money what percent of your yearly living expenses you'd be willing to cut back on should that be necessary to cover large expenses or the savings contributions you want to make.

Tells Money to stop setting aside the amount you've specified for your contributions to savings once you've reached the limits set by the Internal Revenue Service.

Tells Money that once you've reached the savings contribution limits set by the Internal Revenue Service, you want to invest that regular contribution amount in your taxable portfolio.

Tells Money what percent of your yearly surplus income (if any) you expect to invest.

Type the amount of the lower limit of this tax bracket.

Type the amount of the lower limit of this tax bracket.

Type the amount of the lower limit of this tax bracket.

Type the amount of the lower limit of this tax bracket.

Type the amount of the lower limit of this tax bracket.

Type the percent at which mid-term capital gains are taxed.

Enter the amount of the maximum capital loss allowed.

[Click here to set the currency you want to use in the Planner.](#)

Choose the correct units for the exchange rate you've entered.

Click this to have Money update this exchange rate automatically each time it connects to the Internet.

Check this box if this country's currency can be tracked in Euros.

Check this box to track investments in this country using Euros.

Check this to have Money automatically remind you when payments are due.

Check this if you only want to enter your password once.

Uses a single list for categories and subcategories, and a single list for classes and subclasses if you use classifications.

Opens the Check Printing Font dialog box so you can select the font you want to use when printing checks.

Searches your Money file for transactions with this text in the specified field.

Searches your Money file for transactions with the specified text in the selected field(s).

Resets search criteria to the defaults in order to start a new search.

Returns to the previous wizard screen.

Lists the transactions identified by your search.

Takes you to the Reports place and displays a report containing the transactions identified by your search.

Tells Money to open a new transaction automatically when a transaction form is selected.

Tells Money to display a warning when a duplicate check number is entered.

Enter an event you want a reminder for.

Enter the date that you want to be reminded on.

Tells Money that you want Advisor FYI to appear on your personalized Financial Home Page. To have Money generate the information you want, check the options above for all the Advisor FYI categories (Reducing Debt, Investing, Home and Mortgage, Budgeting, and Taxes) you're interested in.

Tells Money that you want to get Advisor FYI Alerts or Advisor FYI on one or more subjects. Check the categories that interest you. If you check any of the first four categories, also click the corresponding tab for that category and then set the limits you want.

Tells Money that you want to search your bank statement for records that match your Account Register.

Check one or more subjects you would enjoy reading about.

Check one or more publishers whose articles you would enjoy reading.

Check this box to put new articles on your personalized Financial Home Page.

Check one or more charts you would like to see appear on your personalized Financial Home Page.

Displays the Payment History place for this loan account, where you can see a chart of your payments over the last 12 months.

Displays the Account History place for this investment account.

Displays the Account History place, where you can see running balance of this account over the past 3 months.

Displays the Loan Details place for this loan.

Displays the Account Details place for this account.

Displays the Account Register for this account.

Displays a list of your transactions for this account.

Displays a list of your transactions for this account.

Displays the Account History place, where you can see a running balance of this account over the last 12 months.

Begins balancing this account.

Displays the Account Details place, where you can view and change account information.

Assigns an income or expense category to this transaction. You can choose one from the list, or type a new one.

Categories are the key to organizing your finances. You'll use them to:

- See where your money is coming from and where it's going.
- Budget income and expenses and compare budgeted amounts with actual amounts.
- Track tax-related income and expenses.

Calculates the value-added tax (VAT) total based on the VAT rate you've entered in the Categories place. You can enter a different amount if you want to override what Money's calculations .

Calculates the VAT total based on the VAT rate you've entered in the Categories area. You can enter a different amount if you want to override what Money's calculations .

Calculates the value-added tax (VAT) total based on the VAT rate you've entered in the Categories place. You can enter a different amount if you want to override what Money's calculations .

Enters this value in the number field for this transaction in the Account Register. You can enter a number for your check transactions, or select the appropriate entry from the list for your electronic or printed transactions (such as Epay, Xfer, or Print).

For transactions such as deposits and automatic teller machine (ATM) withdrawals, leave the Number field blank, or enter a notation such as "deposit" or "ATM."

Enters this value in the number field for this transaction in the account register when the transaction is actually recorded.

You can leave the Number field blank, or select an appropriate entry from the list for your electronic payments (Epay) and printed transactions (Print).

Records the date that this transaction was made (or the date that it will be made).

- To quickly enter a date, type the day of the month and then press TAB to move to the next field. Money will fill in the month and year for you.
- To increase or decrease the date by one day, press the PLUS SIGN (+) or MINUS SIGN (-) key.
- When typing in a date, use a slash (/) as a separator between month, day, and year. For example, enter May 18, 1999 as 5/18/99.

Specifies who is making the payment and who is receiving the payment. You can choose a payee from the list of previously entered payees, or type a new one. When you leave the Payee field, the values from the last transaction with this payee will be entered automatically.

You can generally see a summary of the last five transactions you've sent to a payee by right-clicking the Payee field once you've entered the payee, and then choosing Previous Amounts.

If you type a new payee and enter the transaction, that name is automatically added to your list of payees.

Enters a transaction's payment or deposit amount.

Records the details of a transaction. This is just for your own reference. It won't affect how the transaction is recorded.

Records the details of a transaction. This is just for your own reference. It won't affect how the transaction is recorded.

Provides a level of detail in addition to categories allowing you to track your income and expenses. If you are using single-category lists, this box includes both categories and subcategories (preceded by a colon).

Specifies the frequency of this recurring payment.

For example, if you pay rent on the first day of every month, you'd choose Monthly for the frequency.

Indicates the number of loan payments that have been entered for this Loan Account, including any prior payments you to have entered when you set up the loan account in Money. The loan payment number (Pmt Num) can be used for coupon numbers if the loan has a payment coupon book. It is not the same as the check number or bank account transaction number.

The loan payment number does not always indicate the actual number of loan payments you've made over the life of the loan. For example, if you set up an existing loan to enter previous payments back only to the first of the year, the payment number will not include any payments you made before the first of the year.

Allows you to choose from a list of previously entered investments, or create a new one.
If you create a new investment, it will be automatically added to the Investments place.

Allows you to choose from a list of previously entered investments, or create a new one.
If you create a new investment, it will be added automatically to the Investments place.

Choose the transaction type from the list. The activities available in the list are determined by the type of investment.

Choose the transaction type from the list. The activities available in the list are determined by what type of investment you chose.

Enter the number of shares that you are buying or selling. Money multiplies this by the Price and adds the Commission to get the Total for the transaction.

For the Quantity, Price, Commission, and Total fields, you can enter figures for any three, and Money will calculate the fourth when you enter the transaction.

Enter the per-unit price of this transaction.

What you enter depends on the investment type:

- In Mutual Fund, enter the price per share.
- In Money Market, enter \$1.
- The CD field doesn't apply.
- In Stock, enter the price per share.
- In Bond, enter the price as a percentage of par value. (You can also enter it as a dollar amount if you've specified this in Money's options.)
- In Discounted Bond, enter the price per bond.

For the Quantity, Price, Commission, and Total fields, you can enter figures for any three, and Money will calculate the fourth when you enter the transaction.

Enter the amount you paid your broker for the transaction. The commission price will be added to the Total for this transaction.

The amounts entered in the Commission field are not treated as an expense, and are not included in categorized reports or in your budget. Money adjusts for commission amounts when calculating capital gains or losses, and commission payments are treated as part of the cost basis for the purchase, reducing the total gain.

For the Quantity, Price, Commission, and Total fields, you can enter figures for any three, and Money will calculate the fourth when you enter the transaction.

Enter the quantity multiplied by the price, and add the commission for this transaction.

For the Quantity, Price, Commission, and Total fields, you can enter figures for any three, and Money will calculate the fourth when you enter the transaction. (This only applies to transactions that have a specific quantity and price.)

Enter the price of this bond.

By default, Money expects you to enter the price as a percentage of par value. For example, if the bond was issued with a \$1,000 par value, and you purchased it for \$1,050, you will enter 105 in the Price field. Money will then use the percentage of par value to calculate the total in dollars.

You can find the purchase price in most newspapers or on the confirmation statement sent by your broker. Most newspapers and brokers quote bond prices as percentages of their par value.

You can change the setting to display your bond prices as dollar amounts instead of percentage of par value by clicking Options on the Tools menu, and then clicking the Investments tab and changing the option.

For the Quantity, Price, Commission, and Total fields, you can enter figures for any three, and Money will calculate the fourth when you enter the transaction.

Use the Transfer From/To field to specify the account where you record proceeds or expenses. For accurate record keeping, Money recommends that when an investment transaction requires or produces cash, you transfer the cash from or to another Money account. This transfer account is commonly the associated cash account, which is set up to handle these sorts of transfers. Its name will already be in the Transfer field.

Use the Transfer From/To field to specify the account where you record proceeds or expenses. For accurate record keeping, Money recommends that when an investment transaction requires or produces cash, you transfer the cash from or to another Money account. This transfer account is commonly the associated cash account, which is set up to handle these sorts of transfers. Its name will already be in the Transfer field.

Assigns this transaction to one of the classification classes or subclasses you created in the Categories and Payees place. You can either choose one from the list, or create a new one by typing it here.

Enter this transaction in the Account Register.

Allows you to divide the transaction amount amongst multiple categories.

You can use split transactions to:

- Deposit part of a check and take some of it in cash.
- Purchase several items you want to categorize separately.
- Itemize a credit card payment.
- Itemize your paycheck.

Closes this transaction and discard any changes you've entered.

Enter the name of the account to which you want to make a transfer in the Subcategory field.

If you use the transaction forms, you can enter a transfer by just clicking the Transfer tab and then choosing the accounts in the fields labeled From and To.

Choose the account to which money is being transferred.

Enter the name of the loan account to which you want to make a payment in the Subcategory field.

When you enter a loan account payment from a Money bank account, a payment transaction is automatically entered into the loan account.

Choose Buy Investment in this field if this transaction is a transfer from this account to an investment account.

Choose the loan account you want this payment to go toward.

When you enter a loan account payment from a Money bank account, a payment transaction is automatically entered into the loan account.

Specify the account that you would like for this transaction.

Allows you to assign this transaction to multiple categories/classifications.

Specifies the correct investment account for this transaction.

Leave this field empty if you want to split this transaction between multiple categories/classifications.

Displays the Account Register for this account.

Displays the Account Register.

Displays the Account Details page, where you can enter or change information about this account and set up Online Services for this account.

Displays the Account History place, where you can see the balance on this account over the past three months.

Lists the currencies available.

Excludes this loan from your debt plan.

Changes the name or type of this loan. The change will be made everywhere this loan appears.

Indicates the shortcut name for this account. If you type the shortcut name, the full name will be filled in when you go to the next field.

Indicates the account number for your loan. You can find this on your statements.

Indicates that this account is a favorite account. You can go to favorite accounts directly from the Money Home screen and the Favorites menu.

Enter comments on this account. This is for your information only.

Designates this account as tax-deductible. Tax-deductible accounts appear on your tax reports to remind you of all the deductions you can take at tax time.

Indicates the loans that are associated with this asset.

Closes this account. You'll still be able to view the history of the account, but the account will not appear in your list of accounts anymore.

Displays the Account Register for the associated loan.

Removes or unlinks an associated account.

Associates another account with this one. Associating accounts makes your net worth reports more accurate.

Lists the account groups for Money accounts. Every account must have an account group assigned to it so that Money knows the purpose of the account.

Lists the currencies Money supports.

Indicates that the account is a charge account, where you have a revolving line of credit.

Indicates that the account is a credit account, where you may carry an unpaid balance from month to month.

Automatically balances your account.

Excludes this account from your savings plan. Money will disregard the balance of this account in your forecast.

Changes your debt information.

Displays the Account History place for this investment account, where you can see the price history over the past 12 months.

Enter the account number of this investment. You can find the account number on your statement.

Enter the name of the financial institution where the investment is held.

Changes the account name or type. The name will be changed everywhere the account is used.

Displays the Account Details place for this investment account, where you can enter or change information about the account.

Enter an abbreviated name for this account. When filling out a transaction you only need to fill out the abbreviation and Money will fill in the full name when you move to the next field.

Enter the fax number of your contact for this investment.

Enter the telephone number of the contact for this investment.

Enter a contact name for this investment.

Lists the currencies that Money supports.

Displays the Financial Planner, where you can create a Debt Reduction Plan to eliminate your credit card debt.

Indicates that the investment account is tax-deferred, meaning that you do not have to pay taxes on this money until you withdrawal it from the fund.

Closes this account. You can still view the history of closed accounts but they do not appear in your account list.

Indicates that this account is a favorite account. You can go directly to favorite accounts from the Money Home screen and the Favorites menu.

Excludes the money in this account from your savings plan.

Displays the Online Financial Services place, where you can set this account up for Online Services.

Indicates that your employer matches a percentage of the funds you contribute to this retirement account.

Indicates that this investment account is a retirement account.

Displays a list of all of your accounts.

Displays the Account History place, where you can see the running balance of this account over the past three months.

Specifies that this account is a liability account.

Launches the New Account wizard. It will take you through the steps of creating an account.

Deletes the account from your Money file.

Displays the Online Financial Services page with this account open.

Displays the Account Details place, where you can make changes to the account name, opening balance, and more.

Displays the Account Details place, where you can view and change your loan information.

Updates the interest rate for this account.

Adjust your loan account balance.

Creates a refinancing model for this loan using the Decision Center Loan worksheet.

Demonstrates how making an extra payment can help you pay off your loan sooner.

Displays your loan payment term information and allows you to change the details.

Displays the Account Register for this loan, where you can enter your transactions.

Enter amount you expect to spend each month on this card.

Enter the credit limit for this credit card.

Indicates that you do not want to include this credit card balance in your savings plan.

Changes your loan information.

Lists all of your Money accounts.

Displays the asset account associated with this loan.

FOR INTERNAL USE ONLY: **Password**

Enter the password for this Money file.

Enter the password for this Money file.

FOR INTERNAL USE ONLY: **Set Up Category List (dlgidSetupFile)**

FOR INTERNAL USE ONLY: **Backup Reminder (dlgidBackup & dlgidBackupClose)**

Suggests a name and location for your backup file or the name and location of the last backup file you made. You can accept the suggestion or type a different name and location.

Creating a backup file of your work on another disk is an extra precaution against data loss.

Closes this dialog box without creating a backup file.

If you want to change your automatic backup options, click the Options button.

Allows you to navigate to the location where you want to store your backup file or find the name and location of the last backup file created.

Displays the Options dialog box, where you can change or turn off the automatic backup reminder.

Allows you to restore the backup to a different file name. This way, your current file will not be replaced.

FOR INTERNAL USE ONLY: **Archive (dlgidArchive)**

Enter the date up to which you want transactions deleted from the current file. Transactions dated the same as, or after, the date you enter will not be removed.

FOR INTERNAL USE ONLY: **Select Import Account (dlgidSellImportAcct)**

Creates a new Money account into which the imported transactions can be added.

Creates a new Money investment account into which the imported transactions can be added.

Creates a new Money investment account into which the imported transactions can be added.

Lists your Money investment accounts.

Lists Money's investments you can use for the imported investment displayed above.

Lists all your existing Money accounts into which the imported information can be added.

FOR INTERNAL USE ONLY: **Assign Import Account (dlgidImportAcct)**

Lists the existing Money accounts into which the imported information can be added.

Creates a new account with the same name the imported account had previously.

Creates a new account.

Creates a new investment.

Exports your Money data to a file in a format that Money recognizes but that other programs may not. This allows you to merge Money files or copy transactions from one Money account to another.

Exports your Money data to a file in a format called QIF (Quicken Interchange Format). This allows you to export your transaction data to any application that recognizes QIF format.

FOR INTERNAL USE ONLY: **Export (dlgidExportAcctType)**

Allows you to export a non-investment account.

Allows you to export an investment account.

Lists your Money investment accounts. Highlight the one you want to export.

FOR INTERNAL USE ONLY: **Select Export Account (dlgidSelExportAcct)**

Lists all your Money accounts. Highlight the account you want to export.

Lists all your Money accounts.

FOR INTERNAL USE ONLY: **Adjust Split Amount (dlgAdjSplitAmt)**

Returns to the Split Transaction dialog box.

Adjusts the total amount to the sum of the split transaction amounts. Choose this if the initial amount you typed was wrong.

Adjusts each split proportionally to account for the unassigned amount. This is especially useful for allocating sales tax.

Leaves an amount in the split transaction unassigned.

FOR INTERNAL USE ONLY: **Split Dialog**

Enters the split and returns you to the transaction.

Removes everything you've entered in this split.

Closes the Split Transaction dialog box without saving any of the changes you've made.

Shows more information on using the Split Transaction dialog box.

Closes this dialog box without saving any changes you have made.

Closes this dialog box without saving any changes you have made.

Closes this dialog box without saving any changes you have made.

Displays the principal/interest breakdown of your loan payment.

Provides an itemized breakdown of your paycheck.

Allows you to split transactions so that you can:

- Deposit part of a check and take some of it in cash.
- Purchase several items you want to categorize separately.
- Itemize a credit card payment.

FOR INTERNAL USE ONLY: **File Required**

Allows you to restore a backup file you're saved previously.

FOR INTERNAL USE ONLY: Investments/portfolio

Allows you to track the performance of investments without owning them.

FOR INTERNAL USE ONLY: Investments/Details

[Click here to connect to Microsoft Investor and research this investment.](#)

FOR INTERNAL USE ONLY: Investments/Price History

FOR INTERNAL USE ONLY: Investments/Analysis

FOR INTERNAL USE ONLY: Investments [created prior to M99 rev.]

Displays the price information, P/E ratios, and volatility ratings for your investments.

Displays the price, quantity, and market value of your individual investments.

Displays the latest market data for your investments.

Displays the performance data for the investments you hold.

Displays a list of your investments. You can view different details about your investments by clicking a view at the left.

Displays a list of all your investments.

Select the area that you want to visit on the Microsoft Investor Web site.

Displays a graph of your holdings by investment type.

Displays the latest price, quantity, and market value of your investment holdings.

Allows you to enter buy and sell transactions for your investment.

Goes back one screen.

Goes to the next step.

Exits the wizard.

Enters a stock split for a security.

Connects to the Internet to find the symbol for this investment.

Connects to the Internet to find the symbol for this investment.

Connects to the Internet and find the symbol for this investment.

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Connects to the Internet to find the symbol for this investment.

Connects to the Internet to find the symbol for this investment.

Connects to the Internet and find the symbol for this investment.

Displays the performance history for this investment.

Displays the details of this investment.

Allows you to enter buys and sells for this investment.

Updates the price for this investment.

Allows you to enter a stock split for your shares.

Allows you to update your Online Quotes.

Allows you to enter a new transaction for this investment.

Allows you to edit an investment transaction.

Deletes an investment transaction.

Lists the buy and sell transactions you have entered for this investment.

Connects to the Internet and download the latest Online Quotes for your investments.

Choose the cost basis method you want to use from this list.

Displays the performance record of this investment.

Allows you to enter buy and sell transactions for your investment.

Allows you to connect to the Internet to find information about this investment.

Displays the details of this investment.

Displays a list of the transactions you've made for this investment.

Displays the details of this investment.

Displays the performance of this investment.

Enter the estimated value of this account.

Select the currency used for the funds in this account.

Check this box if you don't want to include this account in your savings plan.

Changes the way that you categorize your employer's contributions to this account.

Select the Account Group you want this account to be included in.

INTERNAL USE: the following topics were in Money 98 invdlg:

INTERNAL USE: New Investment Account (dlgidNewPort)

Creates a new investment, such as a stock, bond, or CD.

The investment won't actually be part of your portfolio until you enter a buy transaction for it in the Account Register. This way, you can track investments you don't actually own without throwing off your records.

Creates an investment account.

In Money, investment accounts correspond to the brokers with whom you have accounts, and investments are added to Investment Accounts.

INTERNAL USE: Opening Cash Account Balance (dlgidCashBal)

Displays the account balance from your latest statement.

If you plan to record all previous transactions for this account, enter zero now and later record the original transfer of cash into the account.

If you want to start your investment record keeping on a certain date, enter the account balance from that date. You'll be able to change this balance at any time.

INTERNAL USE ONLY: Create New Investment (dlgidNewSec)

Allows you to record information about mutual funds, including those invested in stocks and/or bonds.

Allows you to record information about money market funds.

Allows you to record information about certificates of deposit.

Allows you to record information about stock investments, including common and preferred stock as well as options.

Allows you to record information about bonds that distribute regular interest payments, including government securities with original maturities greater than one year.

Allows you to record information about bonds purchased at a discount, sometimes known as “zero-coupon” bonds. These include government obligations with maturities of one year or less.

INTERNAL USE ONLY: New Mutual Fund

Excludes transactions from this mutual fund from your tax reports. Be careful not to confuse this with accounts that are tax-deferred.

Provides a space for you to enter any comments about the investment. This is just for your own reference.

Indicates the official, market-approved symbol for this investment, as it would be listed in a newspaper index or stock report.

If you use Online Quotes, these symbols are what Money uses to identify which investment prices to update.

This also serves as a shortcut name that can be used to save time when entering transactions.

INTERNAL USE ONLY: New Money Market

Excludes transactions from this money market from your tax reports. Be careful not to confuse this with accounts that are tax-deferred.

Provides a space for you to enter any comments about the investment. This is just for your own reference.

Indicates the official, market-approved symbol for this investment, which is the way it would be listed in a newspaper index or stock report.

If you use Online Quotes, these symbols are what Money uses to identify which investment prices to update.

This also serves as a shortcut name that can be used to save time when entering transactions.

INTERNAL USE ONLY: New CD

Excludes transactions from this CD from your tax reports. Be careful not to confuse this with accounts that are tax-deferred.

Provides a space for you to enter any comments about the investment. This is just for your own reference.

Indicates the official, market-approved symbol for this investment, which is the way it would be listed in a newspaper index or stock report.

If you use Online Quotes, these symbols are what Money uses to know what investment prices to update.

This also serves as a shortcut name that can be used to save time when entering transactions.

INTERNAL USE ONLY: New Stock

Excludes this stock's transactions from your tax reports. Be careful not to confuse this with accounts that are tax-deferred.

Provides a space for you to enter any comments about the investment. This is just for your own reference.

Indicates the official, market-approved symbol for this investment, which is the way it would be listed in a newspaper index or stock report.

If you use Online Quotes, these symbols are what Money uses to know what investment prices to update.

This also serves as a shortcut name that can be used to save time when entering transactions.

INTERNAL USE ONLY: New Bond

Excludes this bond's transactions from your tax reports. Be careful not to confuse this with accounts that are tax-deferred.

Provides a space for you to enter any comments about the investment. This is just for your own reference.

Indicates the official, market-approved symbol for this investment, which is the way it would be listed in a newspaper index or stock report.

If you use Online Quotes, these symbols are what Money uses to identify which investment prices to update.

This also serves as a shortcut name that can be used to save time when entering transactions.

Indicates redemption value of the bond. This is the amount you will be paid when the bond matures. (Bonds are commonly issued with a face value of \$1,000.)

Provides a space for you to enter the maturity date of this bond. The maturity date is the date the bond reaches its face value.

Enter the name for this investment.

Indicates the country of origin for this investment.

Check this to convert the currency of this investment to the Euro.

INTERNAL USE ONLY: New Discounted Bond

Excludes transactions from this bond from your tax reports. Be careful not to confuse this with accounts that are tax-deferred.

Provides a space for you to enter any comments about the investment. This is just for your own reference.

Indicates the official, market-approved symbol for this investment, which is the way it would be listed in a newspaper index or stock report.

If you use Online Quotes, these symbols are what Money uses to identify which investment prices to update.

This also serves as a shortcut name that can be used to save time when entering transactions.

Indicates the redemption value of the bond. This is the amount you will be paid when the bond matures. Bonds are commonly issued with a par (redemption) value of \$1,000.

Provides a space for you to enter the maturity date of this bond. The maturity date is the date the bond reaches its par value.

INTERNAL USE ONLY: Modify Investment Account (dlgidModifyPort)

Enables the associated cash account. If you disable the associated cash account, the account will be removed and the transfer field for all transfers to or from it will be cleared.

INTERNAL USE ONLY: Update Price (dlgidPriceHistory)

Lists all of the investments you've entered.

Enter a date for this price update. Click the down-arrow next to this field to see a calendar where you can quickly choose a date.

Enters the new date and price. The updated information is then added to the list box below and the changes are reflected in your reports.

Enter the updated price (per share) of the investment.

Deletes the highlighted price update from the list.

Indicates the price history of the investment chosen above.

INTERNAL USE ONLY: Investment Categories (dlgidInvCat)

Lists all your transaction categories. Investment activity should generally be categorized as investment income.

Lists all your transaction subcategories.

INTERNAL USE ONLY: Buy Investment

Enter the purchase date of this transaction.

Enter the name of the investment.

Enter the purchase price (per share) of the investment.

Indicates the account to which this investment belongs. If this is a new investment account, Money will prompt you for more details and set up the new account.

Enter the name of the investment. If this is a new investment, Money will prompt you to enter the investment type and other details.

Indicates the price per share of the investment.

Indicates the total amount of this transaction. This will be calculated automatically.

Enter any notes you want to make about this investment or transaction.

Indicates the payee name you entered in the Account Register. You can accept the proposed name or change it.

Specifies the account that provided the funds for this purchase.

Specifies the frequency of this recurring transaction.

Indicates the first due date of this recurring payment.

Type the number of payments you want to make with this automatic payment. Online Services will automatically withdraw the funds from your account and pay the bill when it's due for the specified number of payments or until the final payment date, whether or not you connect to your financial institution.

If you want your financial institution to automatically make this payment until you cancel it, leave this and the Date Final Payment is Due fields blank.

Type the expiration date you want this payment made. Online Services will automatically withdraw funds from your account and pay the bill when it's due until this date, whether or not you connect to your financial institution.

If you want your financial institution to automatically make this payment until you cancel it, leave this and the Number of Payments fields blank.

Select the frequency that corresponds to how often you want your financial institution to send this automatic payment.

Remember, this payment will be sent to this payee with this frequency even if you don't connect to your financial institution.

INTERNAL USE ONLY: Buy Investment Split (dlgidBuyInvSplit)

Indicates the number of shares you have purchased.

Indicates the amount of commission you paid your broker for this purchase.

Provides a list of all the investments you've set up in Money.

Enter the date that the stock split took place.

Specify the ratio of the stock split. For example, if you are entering a two-for-one split, type 2 in the first box and 1 in the second, so that it reads: "2 share(s) for every 1 share(s)."

Specify the ratio of the stock split. For example, if you are entering a two-for-one split, type 2 in the first box and 1 in the second, so that it reads: "2 share(s) for every 1 share(s)."

INTERNAL USE ONLY: Fractional Shares (dlgidFractShares)

Records the fractional shares.

Records only whole numbers of shares. If you choose this option, Money will prompt you to enter the per-unit price of the stock after the split.

Provides a list of all your bank accounts. Choose the one in which you want to deposit the remaining cash from the split.

INTERNAL USE ONLY: Rename Investment (dlgidRenameSec)

Type the name you want for this investment.

Type the name you want for this investment account.

INTERNAL USE ONLY: Investment Options (dlgidOptInvestments)

Provides a warning when the transfer field is left blank. Money recommends that when an investment transaction requires or produces cash, you transfer the cash from or to another Money account.

Displays bond prices as percentages of their par values. Otherwise, they will display as dollar amounts. Bond prices are commonly quoted as percentages.

Indicates the amount of time you need to hold an investment until it is considered long-term. This can have an impact on your tax records.

Allows you to change the way in which your investment transactions are categorized.

Provides a list of all your investments. Highlight the one you want to include in your report or chart.

Enter the new name you want for this investment. The new name will appear everywhere the old one did.

Indicates the account to which this investment belongs. If this is a new Investment Account, Money will prompt you for more details and set up the new account.

Enter the name of the investment. If this is a new investment, Money will prompt you to enter the investment type and other details.

Enter the number of shares you have purchased.

Enter the purchase price (per share) of the investment.

Enter the amount of commission you paid your broker for this purchase.

Indicates the total amount of this transaction. This will be calculated automatically.

Enter any notes you want to make about this investment or transaction.

Enter a date for this price update.

Enter the updated price (per share) of the investment.

Select this option if you want your investments to be tracked as First In, First Out (FIFO).

Specifies that the annual percentage return is to be calculated based on the calendar year to date.

Specifies that the annual percentage return is to be calculated based on the last 52 weeks.

Specifies that the Annual Percentage Return is to be calculated based on all entries to date.

Internal use: the following topics were in csonline.rtf in the Money 98 Help project.

Shows which of your accounts are enabled for Online Statements and Online Bill Payment for the currently selected financial institution.

Displays the Contact Information place, where you can view and change your contact information for this financial institution.

Provides online Help.

To leave Online Bill Payment enabled for this account, click No.

To turn off Online Bill Payment for this account, click Yes.

Sends a general-purpose letter regarding Online Bill Payment.

Sends a letter that inquires about a specific payment.

Sends a general-purpose letter regarding Online Statements.

Sends a message requesting a copy of a check.

Sends a message requesting new paper checks.

Deletes the account you have highlighted.

Select the account for which you have Online Statements.

Displays the investment positions view for the account you have selected above.

Connects to your bank or financial institution.

Displays the progress of electronic payments you've sent.

Displays statements you've received from Online Statements.

Sets up Online Statements and Bill Payment.

Displays the electronic payments you've made in the last 60 days and indicates the status of each.

Launches an Internet browser and visits brokerage Web pages where you can trade securities online.

Starts the Getting Online with Money 99 tour and shows you how Money's online features can simplify the management of your finances.

Brings you online to investigate which Online Statements and Bill Payment services are offered by your financial institution, and what fees they charge for the services.

Read about the Online Statements and Bill Payment services at your financial institution.

Shows information about signing up for online statements and bill payment at your financial institution.

Changes your online statements and bill payment options.

Connects to the Internet and visit the Web page for this financial institution.

INTERNAL USE ONLY: Comment: c-s help for Tools, Options, Online Services, Internet Connection Settings, follows.

Specifies how you want to connect to the Internet with Money's online features.

Sets up Online Quotes.

Selects the financial institution for which you want to change payee details.

The price at which you can buy shares in this option grant.

The expiration date for this option grant. If you don't exercise the shares by this date, you might forfeit your shares.

Click to add an investment or index to your watch list.

Click to remove an investment or index from your watch list.

Displays the price history of an investment and allows you to update the price manually.

Updates your investment prices electronically. Online Quotes will automatically update the market price of each investment for which you've entered an official, market-approved symbol in Investment Details.

Go to either the Price History, Details, Analysis, or Buys and Sells view for this investment.

Shows you a list of transactions for this investment.

[Click here to connect to Microsoft Investor and make an online trade for this investment.](#)

Enter the number of the check you used to purchase this investment.

Shows you useful statistics about your investment and quote information.

Shows you useful statistics about your investment and quote information.

Shows you useful statistics about your investment and quote information.

For internal use only: the following topics deal with brokerage statement download.

Check this if you don't want to see this dialog box again.

Choose this option if you want to add the downloaded investment to your portfolio in Money.

Enter the investment name you want Money to use for this investment.

Click this if you've entered this investment in Money using a different name than the one downloaded.

Click the investment you want from the drop-down list.

Shows a list of your investments, the current number of shares you own, as well as any difference in the number of shares between your brokerage account and your Money file based on the downloaded statement information.

Choose this if you want to enter the quantity changes in Money manually.

Choose this if you don't want to update your account now.

Shows a list of your investments and the current number of shares you own.

Click this [save this list as a tab-delimited text file that you can open in other programs.](#)

Choose this if you want Money to enter the quantity changes from the downloaded statement automatically.

Enter the name for this investment.

Indicates the country of origin for this investment.

Check this to convert the currency of this investment to the Euro.

Enter the name for this investment.

Indicates the country of origin for this investment.

Check this to convert the currency of this investment to the Euro.

Enter the name for this investment.

Indicates the country of origin for this investment.

Check this to convert the currency of this investment to the Euro.

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Indicates the country of origin for this investment.

Check this to convert the currency of this investment to the Euro.

Check this to convert the currency of this investment to the Euro.

FOR INTERNAL USE ONLY: Balance Loan (dlgidLoanBalDates)

Indicates the starting date of the period covered on your loan statement.

Indicates the ending date of the period covered on your loan statement.

Indicates the amount of principal you have paid during this balance period. Accept the amount listed if it matches your loan statement. If it differs, change it to equal the amount on your statement.

Indicates the amount of interest you have paid during this balance period. Accept the amount listed if it matches your loan statement. If it differs, change it to equal the amount on your statement.

Opens a split transaction dialog box where you can change the amount of other fees.

FOR INTERNAL USE ONLY: Adjust Loan Payment Amount (DIDRADPICONT)

Choose this if the total loan payment is correct, but the split amount assigned to principal is incorrect. Typically, you should choose this option if you're adding extra principal to a regular loan payment.

Choose this if the total loan payment is correct, and you want the entire payment to go toward principal. Typically, you should choose this option when you are making an extra payment. Money will remove any other split amounts and assign the total loan payment to principal.

Returns you to the Split Transaction dialog box.

Adjusts the total amount to the sum of the split transaction amounts. Choose this if the initial amount you entered was incorrect.

Choose this if you want to delete any changes you made to the loan payment and revert to the regular loan payment. Typically, you should choose this option if you've made unintended changes. Money will replace your changes with the regular loan payment amount and regular split amounts.

Leaves an amount in the split transaction unassigned.

FOR INTERNAL USE ONLY: Adjust Loan Interest (DIDRADPICONT)

Changes the principal and interest amounts so that they still equal the total amount of the loan payment, which will not change. This is the most common option.

Increases or decreases the interest payment so that it equals the interest calculated as being due on this date. The total amount of the loan payment is adjusted to reflect the change in interest.

Choose this if you don't want to adjust any part of your loan payment.

FOR INTERNAL USE ONLY: Update Default Loan Payments (dlgidUpdateLoanPmt)

Makes the changes you made become the new default loan payment for this loan. Other scheduled payments that match the default loan payment will also be updated with the changes.

Makes the changes you made become the new default loan payment without updating other scheduled payments.

Enters this payment without changing the default loan payment.

FOR INTERNAL USE ONLY: **ACCOUNTS AREA**

Press Enter to open this account.

FOR INTERNAL USE ONLY: **ACCOUNT DETAILS**

Allows you to track this account in Euros.

Goes to the Loans & Debt place in the Lifetime Planner, where you can plan your loan.

Indicates that an introductory interest rate is in effect.

Indicates the permanent interest rate for this loan.

Goes to the Savings & Investments place in the Lifetime Planner, where you can plan your retirement account.

Associates this loan with another account.

FOR INTERNAL USE ONLY: **ACCOUNTS/HISTORY/RETIREMENT INVESTMENT ACCNT**

FOR INTERNAL USE ONLY: **BILLS**

Introduces you to the Bills place.

Skips payment of this bill.

Shows you your account balances.

Shows you a list of your account balances.

Allows you to view your bills under different headings.

Shows you the bills that are due within the specified periods.

FOR INTERNAL USE ONLY: **BILLS/SETUP BILLS & DEPOSITS**

FOR INTERNAL USE ONLY: **Online/Bill Pay**

FOR INTERNAL USE ONLY: **INVESTMENTS/MICROSOFT INVESTOR**

Allows you to analyze stocks in Microsoft Investor.

FOR INTERNAL USE ONLY: **INVESTMENTS/MICROSOFT INVESTOR/HOLDINGS VIEW**

Indicates that this is an employee stock option grant.

Enter additional details for this employee stock grant.

Enter the approved stock market symbol for this employee stock option.

Find the approved stock symbol for this new employee stock option.

Enter the country where this stock is traded.

Allows you to track this investment in the Euro.

FOR INTERNAL USE ONLY: **Investments/Microsoft Investor/Portfolio**

FOR INTERNAL USE ONLY: **Investments/Microsoft Investor/Details**

Enter the country for this investment.

Displays this investment in Investments to Watch.

FOR INTERNAL USE ONLY: **Investments/Microsoft Investor/Price History**

Compares this investment with other investments.

Compares this investment with other indexes.

FOR INTERNAL USE ONLY: **Investments/Microsoft Investor/Analysis**

Updates the price of this stock.

Updates the price of this stock using Online Quotes.

Allows you to record a split in your stocks.

Provides more information on this investment.

FOR INTERNAL USE ONLY: **Investments/Microsoft Investor/Buys & Sells**

FOR INTERNAL USE ONLY: **Layout tab/customize report**

Specifies the level of detail in the report.

FOR INTERNAL USE ONLY: **Reports/Gallery of Reports and Charts**

Add a title for this report.

FOR INTERNAL USE ONLY: **Fonts tab**

Specifies the width of the report columns.

FOR INTERNAL USE ONLY: **Reports/Gallery of Reports and Charts/Spending Habits/Monthly Cash Flow**

FOR INTERNAL USE ONLY: **Layout tab of Customize Report/click on Customize Report button.**

Specifies how the report should be subtotaled.

FOR INTERNAL USE ONLY: **Categories**

FOR INTERNAL USE ONLY: **Categories/Payees**

FOR INTERNAL USE ONLY: **Categories/Tax Software Setup**

Returns to the previous screen.

Goes to the next screen.

Stops the browser.

Refreshes the browser view.

Resizes the browser to use the full screen.

Disconnects you from the Web.

Minimizes the browser.

Enter the payee's address here (first line).

Enter the payee's address here (second line).

Enter the payee's address here.

Enter the payee's city here.

Enter the payee's state here.

Enter the payee's ZIP code here.

Enter the payee's phone number here.

Enter the payee's account number here.

Shows a list of transactions associated with this payee. Double-click on a transaction to see transaction details.

Moves the account into the selected financial institution in Money.

Enter the new name of your account or financial institution.

[Click here to update your Account Register with the downloaded statement information.](#)

Designates this as an unassigned account in Money.

Lists details for the transactions in this report.

Creates a report listing these transactions.

Closes this dialog box.

Switches the default currency of this account between Euros or the previously selected currency.

Indicates in Money that this account is held at the selected financial institution.

Shows a list of transactions associated with this category. Double-click on a transaction to see the transaction details.

Selects the set of payee details you want to change.

Goes to the Financial Planner, where you can incorporate your accounts into your financial plan.

[Click here to get audio help for this screen.](#)

[Click here to read the statement you downloaded from your financial institution.](#)

INTERNAL USE ONLY: **PLANNER MAP**

Goes to the About You place, where you can tell Money about yourself and your family so that you can set up your first goal: Retirement.

Goes to the Savings & Investments place, where you can group your savings and investment accounts according to how you plan to use them.

Goes to the Lifetime Goals and Events place, where you enter the goals and events you want to plan for so that Money can include them in your Lifetime Forecast.

Goes to the Debt Reduction Planner, where you can create the optimal debt plan for your situation.

Goes to Budget and Savings Plan, where you can create a top-level budget that helps you pay yourself first. If you like, you can also plan out the details of your spending and saving.

Goes to the Forecasts, where you can see how your savings, budget, and goals come together in the next year and over your lifetime.

INTERNAL USE ONLY: **Planner/Budget Planner/Left Pane [added 6/15/98]**

Lists where your income comes from.

Lists contributions to long-term savings accounts.

Lists contributions to your Occasional Expense Fund.

Summarizes payments you're making toward loans and debt.

Lists monthly and occasional expense payments.

Shows how your budget works month by month.

Shows how your budget works for the year.

Charts your budget for the next 12 months.

Lets you save the current budget or view another one.

Shows whether your budget works month to month.

Shows whether your budget for the year works.

INTERNAL USE ONLY: **Planner/Budget Planner/GetStarted/Group Accts [added 6/15/98]**

Click the triangle on the left to sort alphabetically or by purpose.

Names each account in your budget and any excluded accounts.

Changes the selected account's purpose to day-to-day spending.

Changes the selected account's purpose to long-term savings.

Assigns the select account to Occasional Expense Funds..

Changes the selected account's purpose to loans and debt.

Excludes the selected account from your budget.

Creates a new account.

Shows the account details for this account.

Closes this dialog box.

INTERNAL USE ONLY: **Planner/Budget Planner/Income Place [added 4/29/98]**

Lists income categories included in your budget.

Adds an income category to your budget.

Removes the selected income category from your budget.

Displays your past income from the highlighted category.

Allows you to schedule a new recurring deposit in Money's Bills & Deposits place or edit an existing one.

Allows you to budget specific amounts for individual months for income in the category selected above.

Enter the amount of income that you expect to receive in the category selected above on a monthly basis.

Enter the amount that you expect to receive in the category selected above on an occasional basis.

INTERNAL USE ONLY: **Planner/Budget Planner/Income Place/Custom & Additional Income DlgBox [added 4/29/98]**

Specifies that the amount for this income is relatively consistent from month-to-month.

Enter the income amount that you expect to receive in the category selected above on a monthly basis.

Enter the income amount that you expect to receive in the category selected above on an occasional basis.

Allows you to budget specific amounts for individual months for income in the category selected.

Specifies the income amount you want to budget for the selected category for the month of January.

Specifies the income amount you want to budget for the selected category for the month of February.

Specifies the income amount you want to budget for the selected category for the month of March.

Specifies the income amount you want to budget for the selected category for the month of April.

Specifies the income amount you want to budget for the selected category for the month of May.

Specifies the income amount you want to budget for the selected category for the month of June.

Specifies the income amount you want to budget for the selected category for the month of July.

Specifies the income amount you want to budget for the selected category for the month of August.

Specifies the income amount you want to budget for the selected category for the month of September.

Specifies the income amount you want to budget for the selected category for the month of October.

Specifies the income amount you want to budget for the selected category for the month of November.

Specifies the income amount you want to budget for the selected category for the month of December.

INTERNAL USE ONLY: **Planner/Budget Planner/Income Place/Edit Deposits DlgBox [added 4/29/98]**

Displays the details of your scheduled deposits for this category.

Adds new scheduled deposit in the current category.

Allows you to edit the recurring details of this scheduled deposit.

Deletes this scheduled deposit from your budget.

Closes this dialog box.

INTERNAL USE ONLY: **Planner/Budget Planner/Expenses Place [added 4/29/98]**

Lists expense categories included in your budget.

Adds an expense category to your budget.

Removes the selected expense category from your budget.

Displays your past expenses from the highlighted category.

Allows you to schedule a new recurring expense in Money's Bills & Deposits place or edit an existing one.

Allows you to budget specific amounts for individual months for expenses in the category selected above.

Enter the amount that you expect to spend in the category selected above on a monthly basis.

Enter the amount that you expect to spend in the category selected above on an occasional basis.

Allows Money to create a budget for you.

INTERNAL USE ONLY: **Planner/Budget Planner/Expenses Place/Auto Budget DlgBox [added 4/29/98]**

Specifies whether you want to add this category to your expense budget.

Checks every option to include them in the budget.

Unchecks every option to clear them from the budget.

INTERNAL USE ONLY: **Planner/Budget Planner/Expenses Place/Edit Expenses DlgBox [added 4/29/98]**

Displays the details of your scheduled expenses for this category.

Adds new scheduled expense in the current category.

Allows you to edit the recurring details of this scheduled expense.

Deletes this scheduled expense from your budget.

Closes this dialog box.

INTERNAL USE ONLY: **Planner/Budget Planner/Expenses Place/Custom DlgBox [added 4/29/98]**

Specifies that the amount for this expense is relatively consistent from month-to-month.

Enter the amount that you expect to spend in the category selected above on a monthly basis.

Enter the amount that you expect to spend in the category selected above on an occasional basis.

Allows you to budget specific amounts for individual months for expenses in the category selected above.

Specifies the amount you want to budget for this expense for the month of January.

Specifies the amount you want to budget for this expense for the month of February.

Specifies the amount you want to budget for this expense for the month of March.

Specifies the amount you want to budget for this expense for the month of April.

Specifies the amount you want to budget for this expense for the month of May.

Specifies the amount you want to budget for this expense for the month of June.

Specifies the amount you want to budget for this expense for the month of July.

Specifies the amount you want to budget for this expense for the month of August.

Specifies the amount you want to budget for this expense for the month of September.

Specifies the amount you want to budget for this expense for the month of October.

Specifies the amount you want to budget for this expense for the month of November.

Specifies the amount you want to budget for this expense for the month of December.

INTERNAL USE ONLY: **Planner/Budget Planner/Long-term savings and Occasional Expenses [added 4/29/98]**

Lists the contributions to this savings program that you have set up.

Schedules a new savings contribution.

Allows you to edit the details of the savings contribution selected in the list.

Deletes the savings contribution selected in the list.

INTERNAL USE ONLY: **Planner/Budget Planner/Long term & Occasional places/Custom Contrib dlgbox**
[added 4/29/98]

Specifies that the amount for this contribution is relatively consistent from month-to-month.

Enter the amount that you expect to contribute on a monthly basis.

Enter the amount that you expect to contribute on an occasional basis.

Allows you to budget specific amounts for the contributions you plan to make in individual months.

Specifies the amount you want to contribute in the month of January.

Specifies the amount you want to contribute in the month of February.

Specifies the amount you want to contribute in the month of March.

Specifies the amount you want to contribute in the month of April.

Specifies the amount you want to contribute in the month of May.

Specifies the amount you want to contribute in the month of June.

Specifies the amount you want to contribute in the month of July.

Specifies the amount you want to contribute in the month of August.

Specifies the amount you want to contribute in the month of September.

Specifies the amount you want to contribute in the month of October.

Specifies the amount you want to contribute in the month of November.

Specifies the amount you want to contribute in the month of December.

INTERNAL USE ONLY: **Planner/Budget Planner/Monthly Summary** [added 6/15/98]

Specifies that you'll use the excess as spending money.

Reallocates the excess to Occasional Expense Fund savings.

Includes your forecast in your monthly report.

Specifies the number of months to report.

Specifies when to forecast unscheduled monthly expenses.

Specifies when to forecast unscheduled yearly expenses.

FOR INTERNAL USE ONLY: **Planner/Budget Planner/Income [entered before 6/98]**

Tells Money how often this transaction occurs.

Indicates that the transaction amount is generally the same every time.

Enters this transaction in the Account Register automatically.

Indicates that these regular transactions will end at some point in the future.

Indicates the number of scheduled transactions remaining.

Indicates the date the last transaction will occur.

Indicates the way in which you plan to make this payment, deposit, or transfer when it occurs.

Lists item under its old budget name.

Save the current budget in the Budget Manager.

Displays the selected budget.

Deletes this budget.

Enter a name for this budget.

INTERNAL USE ONLY: **Forecasts**

Adds a warning to the Monthly Report when your forecast falls below zero.

Goes to the Short-Term Forecast, where you can see a chart of your cash flow over the next 12 months. This chart is based on the transactions you've entered in the Bills area and your budget.

Goes to the Lifetime Forecast, where you can see a chart of your cash flow over your lifetime. This chart is based on information you've entered throughout the Planner.

Allows you to customize your Forecast.

Type a title for your Lifetime Forecast.

Type the title you want for your Short-Term Forecast.

Allows you to choose how far into the future you want to forecast.

Allows you to choose the level of detail you would like to see displayed in the Forecast. .

Specifies that you only want spending accounts to be shown in the forecast.

Specifies that you want both Occasional Expense Fund and spending accounts shown in the forecast.

Choose how conservative you want to be with planning for unscheduled monthly expenses.

Choose how conservative you want to be with planning for unscheduled yearly expenses.

Specifies whether you want gridlines in the forecast.

Specifies whether you want to display the forecast in 3-D.

Changes the fonts in the forecast.

Allows you to preview the forecast with the selections you've made.

Resets the options in this dialog box to the default.

Specifies whether you want to display the forecast in 3-D.

Specifies whether you want gridlines in the forecast.

Specifies that you want the forecast to reflect the cost in future dollars (accounting for inflation).

Specifies that you want the Forecast to reflect how much things cost in today's dollars (not accounting for inflation).

FOR INTERNAL USE ONLY: Planner/Budget Planner/Income/Multi-Budget (Budget manager DB) [added 4/29/98]

Allows you to edit your budget.

Enter a starting date for this budget.

Enter an end date for this budget.

INTERNAL USE ONLY: Budget (Generic)

Specifies that you will receive this amount occasionally throughout the year.

Specifies that you will receive this amount monthly.

Enter the additional amount of income you will receive.

Lists all your income categories. To add another category, click [Add Category](#).

Enter the amount of your gross monthly income.

Choose the frequency of your income.

Enter the amount you receive in additional income.

Displays the Income Details place, where you can list the specifics of all your sources of income.

Lists your expense categories. To add another category, click [Add Category](#)

Lists your income categories. To add another category, click [Add Category](#)

Adds a new category to your budget.

Adds a new category to your budget.

Removes the highlighted category from this budget.

Removes the highlighted category from this budget.

Schedules a new transaction in the Bills & Deposits place.

Enter the amount you expect to receive in addition to your salary.

Specifies that you will spend this amount monthly.

Specifies that you will spend this amount occasionally.

Displays a list of the transactions you've entered in the Bills place for this category.

Enter the additional income you will receive in January.

Enter the additional income you will receive in February.

Enter the additional income you will receive in March.

Enter the additional income you will receive in April.

Enter the additional income you will receive in May.

Enter the additional income you will receive in June.

Enter the additional income you will receive in July.

Enter the additional income you will receive in August.

Enter the additional income you will receive in September.

Enter the additional income you will receive in October.

Enter the additional income you will receive in November.

Enter the additional income you will receive in December.

Enter the amount you will receive in additional income each month.

Displays the Income place in the Budget Planner, where you list all of your sources of income.

Goes to the About You place, where you enter information about yourself, your partner, and your family.

Goes to the Debt Reduction Planner, where you can create a personalized debt plan.

Enter the amount you contribute to retirement accounts each month.

Indicate whether this amount is in dollars or is a percent of your income.

Enter the total amount of infrequent contributions you make to retirement accounts each year.

Goes to Savings place, where you can schedule your recurring deposits to savings in the Bill Calendar.

Enter the information about the manner in which your employer contributes to your retirement.

Enter the amount you contribute to long-term savings accounts every month.

Goes to Savings place, where you can schedule your recurring deposits to savings in the Bill Calendar.

Enter the amount you contribute monthly to Occasional Expense Fund accounts.

Enter the amount you want to leave in your spending accounts each month.

Specifies that you do not want to track your monthly tax deductions.

Specifies that you want to itemize your paycheck deductions.

Allows you to specify how you want to track your tax expense.

Enter the amount you spend for this expense.

Enter the amount you spend on expenses each month.

Goes to the Expenses place in the Budget Planner.

Initiates Money's analysis of your spending. You can add the categories to your expense budget.

Displays a list of the savings transactions you've scheduled.

Schedules another savings transaction.

Makes changes to the highlighted transaction.

Goes to the Savings place in the planner, where you can schedule your recurring deposits to savings in the Bill Calendar.

Deletes the highlighted transaction.

Enter the percent of your contributions that are matched by your employer .

Enter your percentage limit up to which your employer will match your contributions.

Enter the percent of your salary that your employer contributes to profit sharing.

Displays a list of the bills you've already set up in the Bill Calendar.

Deletes this bill from the Bill Calendar.

Deletes this bill from the Bill Calendar.

Makes changes to the highlighted bill.

Adds a new bill to the Bills list. You'll be reminded when the bill is due and can see if you have enough money to pay the bill.

Adds a new bill to the Bills list. You'll be reminded when the bill is due and can see if you have enough money to pay the bill.

Specifies that you want to enter different amounts for each month throughout the year. For example, if you want to budget for additional gift buying in December, you can enter a higher amount for just that month.

Specifies that you want to enter different amounts for each month throughout the year. For example, if you receive a large cash gift for Christmas each year, you can enter zero for every month except December.

Makes changes to the highlighted transaction.

Provides help on entering your income details.

Provides help on entering your expense details.

Allows you to make changes to the highlighted transaction.

Makes changes to your custom budget.

Makes changes to your custom budget.

FOR INTERNAL USE ONLY: **Planner/Budget Planner [added 4/29/98]**

Can't find this anywhere on the left pane. Placeholder. Planner/Budget planner: Annual Fund navigation text in left column of pane.

INTERNAL USE ONLY: **Planner/Debt Planner [entered before 6/98]**

Removes this bill from your debt plan.

Keeps this bill in your debt plan.

Indicates that these bills have been paid.

INTERNAL USE ONLY: **Debt Reduction**

Lists the details of each of your debt accounts (loans, credit cards, liabilities, and lines of credit), according to whether or not they're included in your debt plan.

If you have additional debt accounts that are not listed here, add them by clicking the New Account button. To change the details for an existing account, highlight the account and click the Edit Debt Info button below.

Lists details about each of your debt accounts, grouped according to whether or not they're included in your debt plan. To change the details for an account, highlight the account and click [Edit Debt Info](#), below.

To adjust the width of a column, click the black vertical bar and move it left or right.

To adjust the width of this column, click on the black vertical bar and move it left or right.

Changes the information about the highlighted account.

Moves the highlighted account into or out of your debt plan.

Enters your credit limit for this account.

Specifies whether you pay off the balance in full each month.

Specifies that you want to calculate your debt plan payments based on the amount you want to pay each month.

Specifies that you want to calculate your debt plan payments based on when you want to be out of debt on these accounts.

Enter the amount you can afford to pay each month, or the date by which you want to be out of debt. You can also move the slider to try different amounts and dates. Then view the results at the lower left pane of the screen.

Enter the amount of the extra payment you are making towards your debt plan. You can enter a "one-time" payment more than once; it's just not a regularly recurring payment toward your debt.

Choose the frequency of payments due on this account.

Enter the next payment date for this account.

Type the amount you expect to charge to this credit card each month.

Choose the frequency at which you will make payments.

Type the next payment date.

Type the interest rate on this credit card.

Type your credit limit for this account.

Deletes the highlighted account from your Money file.

Creates a new credit card, liability, line of credit, or loan account.

Specifies that you want to pay a fixed amount each month.

Specifies that you want to get out of debt by a certain date in the future and can adjust your payments accordingly.

Specify the amount you can pay each month to get out of debt or to type a date by which you want to be out of debt.

Type the amount you can pay as one extra lump sum payment towards all your debt.

Lists the bills you've included in your customized debt plan.

Changes any information about this bill.

Specifies whether you want to be reminded by Advisor FYI to stick to your debt repayment plan.

Select how you want to view this information by clicking on the triangle.

Lists the bills you need to pay as a result of your debt plan. To include a listed bill on your Bill Calendar, make sure it is checked before you click Finish.

Click this to make changes to the highlighted payment.

Specifies whether you want to be notified if your plan becomes outdated.

Displays the balance you currently owe on this credit account.

Displays the minimum payment required for this credit account.

Displays the current balance of this charge account.

Interest rates do not apply to charge cards because you pay the entire balance each month. (what is this?)

The minimum payment for this Charge Account is the entire balance. (what is this?)

Displays the current outstanding balance on this liability account.

Displays the minimum payment required for this liability account.

Displays the current outstanding balance on this loan account.

Displays the current interest rate for this loan account.

Enter the next payment date for this liability account.

Enter the credit limit for this liability account.

Enter the current interest rate for this liability account.

Enter the minimum percentage of the balance that you would like to pay each time.

Enter the permanent interest rate for this account.

Enter the date at which the permanent interest rate goes into effect.

Indicates that there is an introductory interest rate in effect for this account.

Enter the minimum payment amount you want.

Indicates that you pay the entire balance of this account each month.

Enter the amount you typically spend during the billing period.

Choose the payment frequency for this account.

Indicates the minimum payment required for this loan account.

INTERNAL USE ONLY: **Planner/Debt Planner**

Indicates the amount to be paid this month.

FOR INTERNAL USE ONLY: Planner [created prior to M99 rev.]

INTERNAL USE ONLY: About You

Type your partner's first name.

Type your first name.

Enter your date of birth.

Enter your partner's date of birth.

Enter your yearly salary, not including extra income such as bonuses.

Enter your partner's yearly salary, not including extra income such as bonuses.

Enter the amount you contribute to a retirement fund each year, not including any employer matching.

Enter the amount your partner contributes to a retirement fund each year, not including any employer matching.

Enter the age at which your partner wants to (or already did) retire.

Enter the age at which you want to (or already did) retire.

Enter your life expectancy. Money uses this information to create a lifetime financial plan for you.

Enter your partner's life expectancy. Money uses this information to create a lifetime financial plan for you.

Type the first name of the dependent.

Enter the birth date of the dependent.

Click to add a new dependent.

Click to change the information about the highlighted dependent.

Click to delete the highlighted dependent from the list.

Lists your dependents. To enter a new dependent, click New.

INTERNAL USE ONLY: **Goals and Events**

Displays the goals and events you have created.

Specifies whether you want to include the highlighted goal in your forecast.

Adds a new goal or event to your plan.

Deletes the highlighted goal or event from your plan.

Changes an aspect of the highlighted goal or event.

INTERNAL USE ONLY: **Taxes**

Indicates the amount that you pay each month in taxes. Click the Tracking Taxes button if you want to change how you track your tax expense.

Enter the total amount you pay each month in taxes.

Enter the amount you pay each month in taxes. To make an entry in this field, click Tax Tracking and select "Track taxes as a single, lump-sum monthly amount."

Specifies the budget you want to see.

INTERNAL USE ONLY: **Savings and Investments, Move Account dialog**

Specifies that this account is a long-term savings or investment account, meaning that you do not intend to use the money for at least one year.

Specifies that this account is a retirement account, such as a 401K, IRA, Keogh, or other tax-deferred account.

Specifies that this account is for Occasional Expense Fund savings, which Money defines as funds you plan to spend within one year.

Specifies that this account is spending money.

Specifies that this account should not be included in the savings plan because it will not be used to fund your financial plans.

Type the rate of return you expect to receive on these accounts prior to retiring.

Type the rate of return you expect to receive on these accounts after retiring.

Lists your savings and investment accounts, grouped according to their purpose. If an account in this list is not used to fund your personal finances, move it to the Exclude From Plan account group. To add an account, click New Account.

Creates a new account.

Moves the highlighted account into a different group.

Changes the expected rate of return on the highlighted account group.

Displays the Account Details for the highlighted account.

[Click here to start organizing the accounts in your budget.](#)

Moves the excess to your Occasional Expense Fund.

Specifies the excess will be used as spending money.

Click the down-arrow and choose to see all details or just summary information.

[Click to see information about understanding your budget forecast.](#)

Shows budget activity for the timeframe you selected on the budget forecast chart.

FOR INTERNAL USE ONLY: **Confirm Printing**

Click this if all the checks printed correctly. In each transaction for which you printed a check, the correct check number replaces the word "Print" in the Number field.

Click this if the printing was unsatisfactory and you would like to reprint any of the checks using different printer settings.

Lists all the accounts in which you've set up checks for printing by entering "Print" in the Number field.

Prints a test check to make sure that everything aligns properly.

Prints a test check to make sure that everything aligns properly.

Type the preprinted check number of the first check loaded in the printer.

Type the number of checks remaining on the sheet of checks you've loaded.

Type the preprinted check number of the first check loaded in the printer.

Choose this if the envelope feeder is located in the center of the paper tray.

Choose this if you load the checks from one side of the paper tray.

Choose this if your printer requires that you feed partial sheets with the right edge of the check first.

Choose this if your printer requires that you feed partial sheets with the left edge of the check first.

Shows the number of checks remaining on this sheet. If you're loading a full sheet of checks, leave this blank.

FOR INTERNAL USE ONLY: **Select Checks (dlgidSelectChecks)**

Lists all of the transactions that are ready to print.

Highlights all of the items in the list.

Removes highlighting from all items in the list. You might click this if you selected some items by mistake and want to start over.

Type the preprinted check number of the first check that is loaded in the printer.

Goes to the Print Checks tab of the Options dialog box, where you can adjust your printing alignment. This option applies to laser checks only (for laser checks only).

Goes to the Print Checks tab of the Options dialog box, where you can adjust your printing alignment (for laser checks only).

Goes to the Print Checks tab of the Options dialog box.

FOR INTERNAL USE ONLY: **Select Check Type (dlgidCheckType)**

Lists the available check types.

INTERNAL USE ONLY: Mark Transaction Range as Cleared (dlgidClearRange)

Indicates the beginning point of the range of transaction numbers that you want cleared.

Indicates the end of the range of transaction numbers that you want cleared.

INTERNAL USE ONLY: Archive Account (dlgArcAcct)

Removes all transactions before the specified date.

The archiving function is intended for information to which you rarely refer, so be sure that you won't need a record of these transactions for any reports that you plan to create in the future.

Also be sure that all of the transactions occurring during this period are reconciled and cleared.

Removes only transactions that have been marked as cleared or reconciled. Cleared transactions have a letter "C" in the Cleared field; reconciled transactions have an "R" in the Cleared field.

The archiving function is intended for information to which you rarely refer, so be sure that you won't need a record of these transactions for any reports that you plan to create in the future.

Also be sure that all of the transactions occurring during this period are reconciled and cleared.

Removes only transactions that have been reconciled.

The archiving function is intended for information to which you rarely refer, so be sure that you won't need a record of these transactions for any reports that you plan to create in the future.

Also be sure that all of the transactions occurring during this period are reconciled and cleared.

Doesn't remove any transactions from this account.

INTERNAL USE ONLY: Archive Investment Account

Removes all investment transactions that occurred before the specified date.

Removes only investment transactions that have been marked as cleared or reconciled. Cleared transactions have a letter "C" in the Cleared field; reconciled transactions have an "R" in the Cleared field.

Removes only investment transactions that have been reconciled.

Doesn't remove any investment transactions from this account.

INTERNAL USE ONLY: Archive Loan (dlgidArcLoan)

Compensates for the removed transactions by adjusting the opening balance of the loan account.

Compensates for the removed transactions by entering a summary transaction for each year.

Compensates for the removed transactions by entering one summary transaction.

Choose this if you prefer that Money not remove any transactions from the Loan Account specified in the dialog box.

INTERNAL USE ONLY: Online Services Write Letter options

Choose this if you have any questions about Online Bill Payment.

Choose this to start a payment investigation. For example, if a payment you sent hasn't been debited from your account, you can find out why this way. Before starting a payment investigation, highlight the payment on the Payments in Progress tab, and then click the Payment Status button.

Choose this if you have any questions about Online Statements.

Choose this to receive a copy of a processed check in the mail.

Choose this to order new checks you'll receive in the mail.

Type the name of the person or department to whom you want to direct your letter.

Lists all of the accounts you've set up for Online Statements. Highlight the one your letter is about.

Type a short title or subject for your letter.

Type your question.

Lists your past online payments. Once you send the letter, you will receive a response within the next two days. Remember that you will have connect to your financial institution again to receive the response.

Gives you advice on importing your Quicken information into Money.

Click this to create a new Money file.

Most of the time you'll work with a single file. However, you may want to create an additional file if you're maintaining two different sets of accounts, such as one for home and one for a business or charity.

Lists your Money accounts. Choose the one you use to track the account listed above.

Click this if you want to create a new account to track the account listed above.

[Click this for more information on choosing the Money account that matches the account listed above.](#)

Internal Use Only: the following ids appear in the import ofx dialog:

Choose the Money account to which you want to add the downloaded information.

Creates a new Money account.

Postpones adding the imported information to your file and allows you to select a different file.

INTERNAL USE ONLY: **DATES**

Choose to specify a date, or select an event, from the drop-down menu.

Choose to specify a date, or select an event, from the drop-down menu.

Click the down-arrow to choose a month from the drop-down list.

Enter the year.

How old will this person be?

Click to add a new income to the list above.

Click to edit the selected income above.

Click to delete the selected income above.

INTERNAL USE ONLY: **LIFETIME PLANNER\INCOME\CAREER PLACES**

Displays the main screen for the Lifetime Planner.

Shows places that summarize what you earn.

Shows the income you earn from your career.

Shows the income your partner earns from his or her career.

Shows your annual gross salary (before taxes).

[Click here if you are self-employed.](#)

Click to specify how much your annual raises are likely to be and when you will achieve your maximum salary level (ignoring inflation).

Click the down-arrow on the right to specify the average percentage rate for your annual raises.

Type a percentage to complete the phrase shown to the left of this field.

Specify how old you'll be when you will achieve your maximum salary level (ignoring inflation).

Lists events that will affect the income you earn throughout your career.

Click to define a new event during your career.

Click to edit the event you selected in the table.

[Click here to delete the event you selected in the table.](#)

Check here to tell Money to omit the selected event from your lifetime plan. Uncheck this box to include the event in your plan.

Choose an option to specify whether you want the amounts shown in the chart to be adjusted for inflation.

Specify the amount of your income (in Your Career) or your partner's income (in Your Partner's Career).

Specify how often you get paid this amount (in Your Career) or how often your partner gets paid (in Your Partner's Career).

Choose this option if you get bonuses or tips in a lump sum (in Your Career) or if your partner does (in Your Partner's Career).

Specify how much you receive in bonuses or tips (in Your Career), or the amount your partner does (in Your Partner's Career).

Specify how often you receive this amount of bonuses or tips (in Your Career) or how often your partner does (in Your Partner's Career).

Choose this option if you get bonuses or tips as a percentage of your salary (in Your Career) or if your partner does (in Your Partner's Career).

Specify what average percentage of your salary you receive in bonuses or tips (in Your Career), or your partner's percentage (in Your Partner's Career).

Check this box if Social Security taxes are paid on this income. Uncheck it if they aren't.

Choose this option if you want to estimate this salary instead of linking to any paychecks shown below.

Choose this option to calculate the salary by checking one or more paychecks shown below.

Check one or more paychecks shown here to link them to your lifetime plan. Uncheck any that you don't want linked to your plan.

Check this box if Social Security taxes are paid on this income. Uncheck it if they aren't.

INTERNAL USE ONLY: **LIFETIME PLANNER\INCOME\OTHER INCOME**

Shows the income you earn or will earn from sources other than your careers.

Lists sources of income other than your careers.

Click to add a new source of income to the list.

Click to edit the item you've selected from the table above.

Click to delete the selected item from the table above.

INTERNAL USE ONLY: **LIFETIME PLANNER\INCOME\TAXES & INFLATION**

Displays a place where you can specify the average tax and inflation rates that affect your earnings and savings.

Click the down-arrow on the right to choose your state from the drop-down list.

Choose this option to let Money calculate your effective tax rate. This rate is calculated by adding federal, state, and local taxes together, and dividing the sum by the amount of your gross income.

Choose this option to specify your own estimated tax rate. Remember to consider all federal, state, and local taxes, and all earned income, in your calculations.

Shows the income you earn from your career.

[Click to change the assumed inflation rate for your financial plan.](#)

Specify the inflation rate you want to use for your financial plan, or use the one Money suggests.

INTERNAL USE ONLY: **LIFETIME PLANNER\INCOME\EXPENSES\LIVING EXPENSES**

Displays places that show the day-to-day and occasional expenses you'll have.

Displays a place that summarizes what you spend on day-to-day expenses.

Shows the annual sum of your day-to-day living expenses. Click the down-arrow on the right to enter an amount, or click Estimate Expenses to let Money help you with this estimate.

Lets you view and choose one of two estimates provided by Money.

Choose this option to enter an estimate based on the information shown above.

Enter an amount here. Use the information shown above to help you estimate this amount.

Choose this option to use this amount calculated from your budget. When you use this option, any changes you make to your budget are reflected automatically in your lifetime plan.

Lets you enter a new adjustment to your current or future living expenses.

Lets you edit the living expense adjustment that you selected in the table.

Lets you delete the selected living expense adjustment.

Check here to tell Money to omit the selected item from your lifetime plan. (Remove the check mark to include it in your plan.)

Choose an option to specify whether you want the amounts shown in the chart to be adjusted for inflation.

Type a name for this new adjustment to your day-to-day living expenses.

Choose this option if this adjustment will increase or decrease your living expenses by a certain percentage. Specify the details on the right.

Click the down-arrow to specify whether this is an increase or decrease to your living expenses.

Enter the percentage of the adjustment.

Choose this option if this adjustment will increase or decrease your living expenses by a certain dollar amount. Specify the details on the right.

Click the down-arrow to specify whether this is an increase or decrease to your living expenses.

Enter the dollar amount of the adjustment.

INTERNAL USE ONLY: **LIFETIME PLANNER\INCOME\EXPENSES\COLLEGE & OTHER**

Shows the one-time or short-term expenses you are planning for.

Lists the one-time and short-term expenses you are planning for.

Lets you add a one-time and short-term expense to your plan.

Lets you edit the expense you selected in the table.

Lets you delete the selected expense.

INTERNAL USE ONLY: **LIFETIME PLANNER\INCOME\LOAN & DEBTS**

Displays a place that summarizes what you owe in loans and other debt.

Lists the loans and other debt you currently carry.

Click to add a new loan to the list.

Click to edit the details of the item you selected from the list.

Click to delete the selected item from the list.

Check here to tell Money to omit the selected item from your lifetime plan. (Remove the check mark to include it in your plan.)

Lists your planned changes that will require you to adjust living expenses.

INTERNAL USE ONLY: LIFETIME PLANNER\ABOUT YOU

Tell Money about the people in your financial future.

Type your first name here.

Type your date of birth.

Type the age at which you want to (or already did) retire.

Type your life expectancy.

Type your partner's first name.

Type your partner's date of birth.

Type the age at which your partner wants to (or already did) retire.

Type your partner's life expectancy.

Click here to go to Decision Center's Life Expectancy calculator to learn the average life expectancy for someone like you.

Click to add a new dependent to your financial plan.

[Click to change information about a dependent in your plan.](#)

Click to delete this dependent from your plan. If the dependent is linked with any income or expenses in your plan, they'll be permanently removed too.

Lists all the dependents you've added to your lifetime plan. Click a button below to change what you see here.

INTERNAL USE ONLY: SAVINGS & INVESTMENTS

Lists all your investment accounts, savings contributions, and expected returns.

Lists all the savings and investment accounts you have now or expect to have in the future.

Lists the name of your savings and investment accounts with related information such as contributions, cost basis, and the account value.

Click to add your current savings and investment accounts to Money and your financial plan.

[Click here](#) and choose an option to change the owner, account value, cost basis, information about your contributions.

Click to delete a savings or investment account, including the transactions you've entered and all contributions associated with the account.

Check here to omit the highlighted account from your plan. Uncheck this box to include it in your plan.

Specifies how you'll contribute to your savings for long-term goals.

Lists the savings contributions you're making now or want to make in the future, including the names, dates, and amounts you've specified. Also lists any employer contributions.

Click to add a new savings contribution to your plan.

Click [here](#) and choose an option to change the name, source, amounts, and other information related to your savings contributions. To review all the details you've entered about the contribution, choose All Details.

Click to delete a savings contribution from Money.

Specifies the investment returns you expect to get.

Allows you to specify a single average rate of return for all your savings and investment accounts, both before and after you retire.

Allows you to specify different average rates of return for each type of account in your plan, both before and after you retire. Specifying the details can be useful if you have very different investment time horizons or asset allocations for various account groups.

Enter the annual percentage rate of return you're expecting to get for all your investments before retirement. If you have a partner, enter the rate you expect to get before you're both retired.

This is usually a higher number than what you'd get after retirement, because many people with a long investment horizon choose aggressive growth investments (such as small company stocks) with higher expected rates of return.

Enter the annual percentage rate of return you're expecting to get for all your investments after retirement. If you have a partner, enter the rate you expect to get after you're both retired.

This is usually a smaller number than what you'd get before retirement, because many retired people choose safer investments (such as CDs, annuities, or bonds) with lower expected rates of return.

Enter the return rate you're expecting for your tax-deferred accounts before retirement. If you have a partner, enter the rate you expect to get before you're both retired.

Enter the return rate you're expecting for your partner's tax-deferred accounts before you and your partner are both retired.

Enter the return rate you're expecting for your taxable accounts before retirement. If you have a partner, enter the rate you expect to get before you're both retired.

Enter the return rate you're expecting for your partner's taxable accounts before you and your partner are both retired.

Enter the return rate you're expecting for all your dependents' accounts before retirement. If you have a partner, enter the rate you expect to get before you're both retired.

Enter the percentage realized gain you're expecting for all your dependents' accounts before retirement. If you have a partner, enter the rate you expect to get before you're both retired.

Enter the annual percentage rate at which you expect the underlying stock price(s) to grow until the options are exercised. After that, expect the value to grow at the same rate as your taxable accounts.

Enter the return rate you're expecting for your tax-deferred accounts after retirement. If you have a partner, enter the rate you expect to get after you're both retired.

Enter the return rate you're expecting for your partner's tax-deferred accounts after you and your partner are both retired.

Enter the return rate you're expecting for your taxable accounts after retirement. If you have a partner, enter the rate you expect to get after you're both retired.

Enter the percentage realized gain you're expecting for your taxable accounts after retirement. If you have a partner, enter the percent you expect after you're both retired.

Enter the return rate you're expecting for all your dependents' accounts after you and your partner are both retired.

Enter the percentage realized gain you're expecting for all your dependents' accounts after you and your partner are both retired.

Check if you want to see this warning.

INTERNAL USE ONLY: SAVINGS & INVESTMENTS/Edit Contrib Limits dbox

Click to return all settings to their default values.

Specify the maximum dollar amount that you are allowed to contribute per year.

Specify the maximum percentage of your salary that you are allowed to contribute per year.

Specify the maximum dollar amount that you and your employer combined are allowed to contribute per year.

Specify the maximum percentage of your salary that you and your employer combined are allowed to contribute per year.

For contributions equal to a percentage of your salary, what is the maximum salary amount on which you can base contributions?

INTERNAL USE ONLY: HOMES & ASSETS PLACE

Displays the homes and other major assets you own or want to own.

Lists the major assets you own or want to own. To change what you see here, click a button below.

Click to add a house or other asset to your lifetime plan.

[Click to change information you've entered about a house or other asset.](#)

Click to delete a house or other asset from your lifetime plan.

INTERNAL USE ONLY: RESULTS PLACE

Shows how your financial plan works over time.

Tells you if you have enough money to meet all your lifetime goals.

Summarizes the outcome of your plan.

Select this option to see how your figures will be changed by inflation. If you change the estimated annual inflation rate in the Lifetime Planner's Taxes & Inflation place, this view will reflect that new rate of inflation.

Enter a future year of your plan to see the forecasted details about it below.

Drag the bar left or right on the slider, and then drop it to see information about the year you've selected.

Select this option to see how your figures will be changed by inflation. If you change the estimated annual inflation rate in the Lifetime Planner's Taxes & Inflation place, this view will reflect that new rate of inflation.

[Click this to print the yearly summary.](#)

Click this to see a Help topic with more information about this chart or report.

[View this information as a statistical report.](#)

View this information as a line chart.

View this information as a pie chart.

View this information as a bar chart.

View the bars as stacked one on top of the other.

Tells Money not to show labels on the pie chart.

Tells Money to label the pie chart with percentages.

Tells Money to label the pie chart with dollar amounts.

Tells Money where to display the chart's legend.

Check this option to hide how your figures will be changed by inflation.

Select this option to see how your figures will be changed by inflation. If you change the estimated annual inflation rate in the Lifetime Planner's Taxes & Inflation place, this view will reflect that new rate of inflation.

Displays a three-dimensional chart.

Displays gridlines on your chart.

Click the down-arrow to choose a special start date from the menu.

Click the down-arrow to select a month.

Click the down-arrow to choose a special end date from the menu.

Click the down-arrow to select a month.

Click the down-arrow to select a year.

Click to show your taxable investment accounts in the chart or report.

Click to show your tax-deferred investment accounts in the chart or report.

Click to include your homes and special assets in the chart or report.

Click to include your dependents' accounts in the chart or report.

Click to include your loans in the chart or report.

Click to include your stock options in the chart or report.

Click to include your projected deficit in the chart or report.

Check if you want the amounts shown in the chart to be adjusted for inflation.

Click the down-arrow to choose a forecast question from the list.

Specify the year for which you want to see details. Enter it here, or drag the bar to the right to select the year.

Check if you want the amounts shown to be adjusted for inflation.

INTERNAL USE ONLY: RESULTS TABS

Shows personalized advice for making your plan better.

Offers answers to questions about your financial future.

Summarizes the information in your lifetime plan.

Shows the details of any year you choose in your financial future.

INTERNAL USE ONLY: ACTION PLAN

Suggests the steps to take to put your plan in motion.

Check here if you want to see this reminder.

Check here if you want to see this monthly report.

