

Secure QB Plug-InSM for QuickBooks®

Installation Instructions

A. Compatibility List for the Secure QB Plug-in for QuickBooks®

1. Desktop OS Supported: Windows Vista, 7, 8 and newer
2. QuickBooks versions supported: QuickBooks 2009 or later – U.S. Editions (including 2015)
(Includes: QuickBooks Pro, Premier, Enterprise and Accountant versions)
3. .NET Framework 4.0 FULL: Microsoft .NET Framework 4.0 is required
(Downloaded from Windows Update or Microsoft.com)

B. Pre-Installation Instructions

1. Update Windows for .NET Framework and certificates, if needed.
Required: Update Windows to at least .NET Framework 4.0 or newer
2. Make sure QuickBooks is installed with no update errors.
3. Backup your company file.
4. Make sure you have “administrator rights” to your computer and to QuickBooks.
5. Keep the plug-in credentials ready to enter into the Application Settings.

For best results: Disable QuickBooks from running in the background prior to installation

How to fix

1. In QuickBooks, choose Edit/Preferences/General/My Preferences
2. Click to clear the checkbox: Keep QuickBooks® running for quick startups.
3. Click [OK]

*After you close QuickBooks or restart your computer, QuickBooks won't run in the background

*QuickBooks Quick Startup is a feature in QuickBooks 2011 or later and is the application process (QBW32.exe) found in the Windows Task Manager.

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C. Installation Instructions for Windows Vista, Windows 7, and Windows 8

Windows Vista, 7 and 8 users

1. Close QuickBooks
2. Download the plug-in:
 - www.secureqbpugin.com/plugindownload.html
 - QBFC13.exe (Windows 7 and 8 users only)
3. Run/Install
4. Run QuickBooks normally and log in as the admin user.
 - If you get a pop-up called QuickBooks "Run-time error":
 - Find the QuickBooks icon
 - Right click
 - Choose "Run as Administrator"
5. To start the plug-in software:
 - click the icon on your desktop.
6. **First computer ONLY:**

Accept the certificate, click:

Yes, whenever this QuickBooks company file...

allow this application to access personal data...

Click [Continue] then [OK]
7. **Insert your plug-in credentials**

Company ID

Store Key

User ID

 - Click [Test Connection]
 - Click [OK]
8. **Installation is complete and ready to start processing.**

Troubleshoot the following in no particular order if the plug-in is not working:

I cannot find the plug-in icon on my screen.	Check the Windows bar at the bottom of your screen. The plug-in may be hidden behind QuickBooks. It may be helpful to add the icon to the task bar.
QuickBooks may have still been running in the background during installation.	Follow the "How to Fix" solution on the first page of these instructions. Repeat installation.
I cannot access the company file.	Ensure the two boxes are NOT checked at the following location: Edit\Preferences\Integrated Applications\Company Preferences
The plug-in will not run in "Windows Administrator Mode".	This is a security measure. Exit this mode.
I am having difficulty running multiple versions of QuickBooks on the same Windows user.	The plug-in can only have one company file open at a time. Close any additional company files or additional versions with the same company file.
I received an error message: QuickBooks "Run-time error"	Right click on the QuickBooks icon and run QuickBooks as a "Windows Administrator." Go to the Company File Login screen. Cancel the login and exit QuickBooks. Restart QuickBooks.
General issues	<ul style="list-style-type: none"> • Reboot your computer to reset Windows and QuickBooks. • Ensure that a company file is open in QuickBooks. • Click on QuickBooks and check for updates. If updates are available, install the updates and restart the plug-in.