

SecureQBPlugin.com

Transaction Add-on version 2.x for QuickBooks®

Installation Instructions

A. Compatibility List for the Transaction Add-on for QuickBooks®

1. **Desktop OS Supported:** Windows XP, Windows Vista, Win 7, 8 and 8.1
2. **Server OS Supported:** Windows Server 2003 SP3 or later (including 2012 R2)
3. **QuickBooks® Supported:** QuickBooks® 2007 or later – U.S. Editions (including 2014)
(Includes: QuickBooks® Pro, Premier, Enterprise Solutions and Accountant versions)
4. **.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 if needed for .NET Framework and Certificates
Required: Update Windows to at least .NET Framework 4.0 or newer
2. Make sure QuickBooks® is installed and up to date.
3. Backup your QuickBooks® File
4. Make sure you have “**administrator rights**” to your computer and QuickBooks®
5. Keep the “**Plugin 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.*

C. Installation Instructions for Windows XP, Vista, Win 7, Win 8 and Server		
Windows XP users	Windows Vista users	Win 7 and 8 users & Server
<p>1. Close QuickBooks</p> <p>2. Download the following: www.secureQBplugin.com/download.html</p> <p>3. Run / Install</p> <p>-----</p> <p>4. Run QuickBooks normally and log in as the admin user</p> <p>-----</p> <p>5. To start the Plugin Software: - click the icon on your desktop.</p> <p>6. First computer ONLY: Accept the Certificate, Click: <input type="checkbox"/> Yes, whenever this QuickBooks company file... <input type="checkbox"/> allow this application to access personal data... Click [Continue] then [OK]</p> <p>7. Insert your Plugin Credentials Company ID Store Key User ID > Click [Test Connection] > then [OK]</p> <p>8. Installation is complete and ready to start processing</p> <p>You can now start using the software or switch QuickBooks users.</p>	<p>1. Close QuickBooks</p> <p>2. Download the following: www.secureQBplugin.com/download.html</p> <p>3. Run / Install</p> <p>-----</p> <p>4. Run QuickBooks normally - log in as the admin user <i>^ If you get a pop-up called QuickBooks "Run-time error": - find the QuickBooks icon - Right-click - Choose "Run as Administrator"</i></p> <p>-----</p> <p>5. To start the Plugin Software: - click the icon on your desktop.</p> <p>6. First computer ONLY: Accept the Certificate, Click: <input type="checkbox"/> Yes, whenever this QuickBooks company file... <input type="checkbox"/> allow this application to access personal data... Click [Continue] then [OK]</p> <p>7. Insert your Plugin Credentials Company ID Store Key User ID > Click [Test Connection] > then [OK]</p> <p>8. Installation is complete and ready to start processing</p> <p>You can now start using the software or switch QuickBooks users.</p>	<p>1. Close QuickBooks</p> <p>2. Download the following: www.secureQBplugin.com/download.html</p> <p>3. Run / Install</p> <p>-----</p> <p>4. Run QuickBooks normally - log in as the admin user <i>^ If you get a pop-up called QuickBooks "Run-time error": - find the QuickBooks icon - Right-click - Choose "Run as Administrator"</i></p> <p>-----</p> <p>5. To start the Plugin Software: - click the icon on your desktop.</p> <p>6. First computer ONLY: Accept the Certificate, Click: <input type="checkbox"/> Yes, whenever this QuickBooks company file... <input type="checkbox"/> allow this application to access personal data... Click [Continue] then [OK]</p> <p>7. Insert your Plugin Credentials Company ID Store Key User ID > Click [Test Connection] > then [OK]</p> <p>8. Installation is complete and ready to start processing</p> <p>You can now start using the software or switch QuickBooks users.</p>

What to do if the Plugin does not work after following the instructions above:

1. Check the bottom Windows bar. The plugin may be hidden behind QuickBooks
2. QuickBooks may have still been running in the background during installation. Follow the "How to fix" solution on the first page if these instructions. Then repeat the installation.
3. 2 boxes are checked in Edit > Preferences > Integrated Applications > Company Preferences
 - Make sure these are **NOT** checked to allow the software to access the Company File and run properly.
4. The Plugin will not run in "Windows Administrator Mode" for security reasons (Vista, 7, 8 and Server)
5. Reboot your computer to reset Windows and QuickBooks.
6. Network, Internet or Windows User Rights issues
7. The Transaction Add-on works by connecting to whatever QuickBooks Company File is open. For multiple versions of QuickBooks on the same Windows User: The plugin can ONLY have 1 Company File open at 1 time.
8. If you get a pop-up called QuickBooks "Run-time error..." find the QuickBooks icon, right-click and run QuickBooks as a "Windows Admin" 1 time and get to the Company File Login screen. Cancel the login and exit QuickBooks. Then Start QuickBooks normally. (Vista, 7, 8 and Server)
9. The Transaction Add-on will not run unless a QuickBooks Company File is open.
10. QuickBooks updates are important. Some of the updates contain fixes and other critical items for 3rd party software. If you are still having issues, click on QuickBooks and check for updates. Then try the plugin again.