

Info

at 13:52, Apr 26:

Welcome to the QuickBooks Capital support chat! QuickBooks Capital experts provide help with product-related questions only. The experts should not be relied upon for legal, accounting, tax, or financial advice and any information provided by an expert, should not be construed as such.

Info

at 13:52, Apr 26:

Kurt John V joined the conversation.

Kurt John V

at 13:52, Apr 26:

Hi! Thank you for messaging Intuit Quickbooks Support. Pleased to meet you online. My name is Kurt.

You

at 13:53, Apr 26:

Hi, I have an email saying additional information needed for client that applied for PPP but I can't access what is needed<sup>Read</sup>

Kurt John V

at 13:53, Apr 26:

Good morning. Did you click the link in the email?

You

at 13:55, Apr 26:

The link says Learn How - is that the link?<sup>Read</sup>

Kurt John V

at 13:55, Apr 26:

By the way, did you receive a phone call from us today?

You

at 13:56, Apr 26:

email said to close and restart which I did not I have a note in QB saying need more information but can't do any thing else.<sup>Read</sup>

You

at 13:56, Apr 26:

Yes received VM<sup>Read</sup>

Kurt John V

at 13:58, Apr 26:

Kurt John V has sent you a Secure Form: [Care - DIFY](#)

You

at 13:58, Apr 26:

In QB there is a pop up that says we need more information and a red item that I need to update information<sup>Read</sup>

Kurt John V

at 13:58, Apr 26:

Can you input your EIN in the secure form?

You

at 13:59, Apr 26:

Where is the secure form accessed?<sup>Read</sup>

Kurt John V

at 13:59, Apr 26:

Kurt John V has sent you a Secure Form: [Care - DIFY](#)

Kurt John V

at 13:59, Apr 26:

Here.

You

at 14:00, Apr 26:

I click your blue bubble says CARE-DIFY but no form pops up!<sup>Read</sup>

Kurt John V

at 14:00, Apr 26:

What can you see after clicking?

You

at 14:00, Apr 26:

nothing ;-(<sup>Read</sup>

Kurt John V

at 14:01, Apr 26:

I see. Just do it here directly but send it 1 by 1. Just for security reason.

You

at 14:01, Apr 26:

Each number in a separate bubble?<sup>Read</sup>

You

at 14:02, Apr 26:

6<sup>Read</sup>

You

at 14:02, Apr 26:

5<sup>Read</sup>

You

at 14:02, Apr 26:

0<sup>Read</sup>

You

at 14:02, Apr 26:

6<sup>Read</sup>

You

at 14:02, Apr 26:

8<sup>Read</sup>

You

at 14:02, Apr 26:

1<sup>Read</sup>

You

at 14:02, Apr 26:

0<sup>Read</sup>

You

at 14:02, Apr 26:

1<sup>Read</sup>

You

at 14:02, Apr 26:

5<sup>Read</sup>

Kurt John V

at 14:03, Apr 26:

Thanks. What's the name of the business?

You

at 14:03, Apr 26:

The Snay Group, Inc<sup>Read</sup>

Kurt John V

at 14:03, Apr 26:

What is your Quickbooks version right now?

You

at 14:03, Apr 26:

2020<sup>Read</sup>

Kurt John V

at 14:04, Apr 26:

Awesome. Let me check that one first.

You

at 14:05, Apr 26:

Thank you<sup>Read</sup>

Kurt John V

at 14:07, Apr 26:

Can you restart your QB and try it again?

You

at 14:07, Apr 26:

I did it once and will do it again. Will I lose you when I do this?<sup>Read</sup>

Kurt John V

at 14:08, Apr 26:

**Yes. Let me check something else. Hold on.**

You

at 14:08, Apr 26:

I finally found the secure form!! It just popped up<sup>Read</sup>

Kurt John V

at 14:09, Apr 26:

**Can you click the update information for me?**

Kurt John V

at 14:10, Apr 26:

**It's okay. Already opened the account.**

Kurt John V

at 14:11, Apr 26:

**The following Secure Form has been submitted: [Care – DIFY](#)**

Kurt John V

at 14:11, Apr 26:

**Can you try clicking the link in the email this time?**

You

at 14:11, Apr 26:

I just filled it in and submitted it<sup>Read</sup>

Kurt John V

at 14:12, Apr 26:

**Okay. Let me just confirm here. =**

You

at 14:12, Apr 26:

Thank you!<sup>Read</sup>

Kurt John V

at 14:12, Apr 26:

**You are welcome. Hold on.**

Kurt John V

at 14:14, Apr 26:

**Thank you for waiting.**

Kurt John V

at 14:15, Apr 26:

**Everything is all good now. Email is on queue. Just wait for an email or a call for the update about your application.**

You

at 14:15, Apr 26:

Sure - just want to get you all whatever additional information is needed<sup>Read</sup>

You

at 14:16, Apr 26:

Okay so for now we wait again? No other information is needed?<sup>Read</sup>

You

at 14:16, Apr 26:

I guess QB just wants to be sure we are waiting and want to continue with the application?<sup>Read</sup>

Kurt John V

at 14:17, Apr 26:

**Yes. As long as we already receive the additional info from you then we can proceed to the next step.**

You

at 14:17, Apr 26:

But QB will contact us again to get the additional information?<sup>Read</sup>

You

at 14:18, Apr 26:

All I did the second time was confirm we are US corporation and one other question I think - no additional documents were asked for/<sup>Read</sup>

Kurt John V

at 14:19, Apr 26:

That I can't confirm. Our back end team are the ones who will contact you in case we need something. But, yes, you will receive an update through email or call.

You

at 14:20, Apr 26:

Okay thanks<sup>Read</sup>

You

at 14:20, Apr 26:

Seems a bit odd to get a call saying they need additional information and then there is nothing really being requested except to sit and wait again? Thank you for your patience.<sup>Read</sup>

Kurt John V

at 14:22, Apr 26:

Our team is just making sure that we got all we need especially bank info to where we'll transfer funds. Just make sure that it's an intuit number who is calling you.

You

at 14:23, Apr 26:

Thank you be sure it is not a scam<sup>Read</sup>

Kurt John V

at 14:23, Apr 26:

You are welcome. Is there anything else?

You

at 14:24, Apr 26:

Not for now. Thank you again<sup>Read</sup>

Kurt John V

at 14:24, Apr 26:

You have a great day and thank you for reaching Intuit support. Goodbye.

You

at 14:25, Apr 26: