

5/11/2020

To Whom It May Concern,

Quick Books Desktop support issue Case #547347941

1. This was my original question to help desk automated response cannot save files to PDF. I even ask the question a different way how to save files as PDF same window comes up.
2. Solution #1 was download Quick Books Tool Hub ran it 3 Times did not solve problem.
3. Contacted support chat they had me check all kinds of things which I checked even as far as trying to update my Adobe program which I gave them the version #20.006.20042 and they said it was the most current version but they said try updating anyway absolutely a waste of time. I tried anyway and of course Adobe responds I am already running most current version. Please read the chat log and listen to the voice recordings the 1st person I talked to hung up on me, called back and got Jackie Millana jm130603 finally she explained to me how to save to PDF
4. This is what should be listed as Solution One in your automated response also every Chat or Phone support person should tell the person calling in for support for any question like cannot save to PDF file, or how do you save a PDF file. The #1 Solution should be an explanation of how to save a file to PDF Not download your Quick Books Tool Hub or all the other stuff I was told to try.
5. Trouble shooting sequence on page #2



- Go to chart of accounts pick any account like checking, credit card, or almost any account.
- Highlight any account
- Select Reports from drop down list bottom of page, select quick report, select print button drop down list at top of page it will give you the option of either printing report or save to PDF from drop down list select Save To PDF.
- Name the file and save it to desktop or any destination file you wish.
- Go to the destination file and it will be there.

My problem with this is, the 1st three support people I talked to assumed I already knew what I listed above if I already knew I would not be contacting support. The first thing that should be listed in automated response to question is what I listed above that should be the first thing all your live support people should do also.

Summary of May 7/2020 Chat 9:44 to 10:56 Duration 1:12 Min Trixia Marie R.

- 9:52 Me: From file drop down list cannot save to PDF it is listed in drop down but not available.
- 9:54 You are you trying to save a payroll form?
- Me: It is just a register for credit card.
- 9:59 You: Is the PDF option also greyed out when trying to print other reports?
- Me: Yes.
- You: Ok, we are going to check if you will have the same problem on a sample file, close your company and open a sample company file.
- 10:06 Me: I have the same problem on three desktops but ok.
- 10:12 You: Just to clarify you want to save credit card register to PDF?
- Me: Yes.
- 10:12 to 10:33 You: Waiting for agent to get transcript of support chat last night.
- Me: I am in the sample company printer prints out register correctly.

At this point if I knew what I know now and certainly all support people should know is you cannot save an account register to PDF. You must go to reports and run a quick report, from that you can either print or save as PDF.

- 10:34 You: You cannot just save it as PDF. What is your PDF Provider? The answer here should have been you cannot save register to PDF you must run a quick report and then you can save as PDF from print dropdown list.



- 10:35 Me: I do not understand the question.
- 10:35 to 10:50 Me doing stuff agent told me to get information on ADOBE gave version running on my desktops she said it was the latest version.
- 10:50 You: Thank you for waiting, I am going to provide a link to ADOBE so you can update.
- Me: I thought you just said that was the latest version. Answered some more questions which were already answered.
- 10:56 You: In case we get disconnected I will give you case # as reference.

Summary of support 5/8/2020

Contacted chat support tried to resume chat from the email all that happens when I select that option is goes to site and your site says we are having trouble opening this page but it will be back soon. Signed in from your page took me to support but could not find an option to open previous chat.

Started a new chat entered my case # I was told in previous chat if I entered the case # the support person would have all the information I already supplied. The first question they asked me what the issue is and what did previous support already check. At that point I requested a call from support. In that request I explained the problem, provided Lic.#, Case# and specified please before you call me have all the chat transcripts so I do not have to repeat myself again.

This is what happened when support called me back he asked me what the issue was and what did previous support do, I asked him don't you have the question I asked in support request and the chat transcript he said he will get it. While he was getting it I was disconnected.

Called support back requested a call filled out all the questions again Jackie Millana called back after a few minutes she gave me the answer was you cannot save a register to PDF you must do it out of Quick Report. Why is that not the first question asked.

Even better when someone asks a question why can't I save a file as PDF your first answer should be you must be in quick report to save to PDF.



Warm regards,
Your Name



Info: Salesforce Case Number (Type): 547462609 Customers Question (Role): Case #547347941 problem with saving a register as PDF. Please read chat&phone before responding_Joel Florist Customer Email (Social ID): ronboehly@comcast.net Customer Name (UserName): Ron_Boehly All values (Store Number): workgroup:carepropremsec;License Number (Press F2 inside QuickBooks):803002964666399; What best describes your reason for chatting today? (Note: To get to a payroll expert directly, use the Help drop down in product and enter in Payroll as the question you're trying to resolve.):How Do I...;

Info: Please wait while we connect you.

Info: Cherry Ann B joined the conversation.

12:41, May 11

Cherry Ann B: Hi Ron! Thank you for messaging Intuit Quickbooks Pro and Premier Desktop Support. Pleased to meet you online. My name is Cherry! How are you doing today?

12:41, May 11

12:42, May 11

You: I am well thank you

12:42, May 11

12:44, May 11

Cherry Ann B: Good to hear that, I see here that you need help PDF, correct?

12:44, May 11

12:45, May 11

You: Did you read the chat from previous calls

12:45, May 11

12:46, May 11

Cherry Ann B: Unfortunately I cant read the previous chat but I saw your previous case number.

12:46, May 11

12:46, May 11

Cherry Ann B: I will be more than happy to help and for me to do that please allow me to pull up your account here in my end for the verification. Would that be fine?

12:46, May 11

12:46, May 11

You: yes

12:46, May 11

12:48, May 11

Cherry Ann B: Thanks!

12:48, May 11

12:48, May 11

You: Did you see my question description

12:48, May 11

12:49, May 11

Cherry Ann B: can you help me verify the name of the account please?

12:49, May 11

12:49, May 11

Cherry Ann B: yes I see here that you have problem while saving register as PDF, correct?

12:49, May 11

12:50, May 11

You: yes

12:50, May 11

12:50, May 11

Cherry Ann B: can you help me verify the name of the account please?

12:50, May 11

12:51, May 11

You: ron boehly you do relize I typed in name email case and license #on the form to connect me to you why am I doing it again

12:51, May 11

12:52, May 11

Cherry Ann B: While checking on the account, would you mind answering the following questions for me please? - How many users do you have? - How are you accessing the company file? - How convenient it is for you to be able to access your files anywhere or working at home?

12:52, May 11

12:53, May 11

You: I will not this is the third time I have answered the same questions

12:53, May 11

12:55, May 11

Cherry Ann B: By the way can you tell me more about your issue for today?

12:55, May 11

12:58, May 11

You: ok lets do this again when I go to chart of accounts and select a account Select File top left corner I can either print or Save as PDF prints fine save as PDF is grayed

12:58, May 11

12:59, May 11

Cherry Ann B: May I know when did you start getting this issue?

12:59, May 11

13:00, May 11

You: I do not know I have never tried to save a register to PDF

13:00, May 11

13:00, May 11

Cherry Ann B: Are you getting any error message?

13:00, May 11

13:00, May 11

You: no

13:00, May 11

13:01, May 11

Cherry Ann B: Do you happen to notice any changes in your computer or in quickbooks like an update/

13:01, May 11

13:03, May 11

You: it updates automatic am not having any problems with it or my other 2 desktops but same problem with all threedesktops

13:03, May 11

13:04, May 11

Cherry Ann B: What do you mean by automatic update is it in your windows or in quickbooks/

13:04, May 11

13:05, May 11

You: Both all programs have options for automatic updates how can you not know this

13:05, May 11

13:06, May 11

Cherry Ann B: have you done any trouble shooting steps in your end?

13:06, May 11

13:08, May 11

You: did you get the chat log for all the other call pertaining to this case # We along with support have checked all kinds of things I asked in the beginning if you had it and read it I assumed you did

13:08, May 11

13:10, May 11

Cherry Ann B: Yes I was able to see the previous case that you have however it is not indicated in there to what are the troubleshooting steps that you have done. I apologize.

13:10, May 11

13:11, May 11

You: I have done every thing suggested as my answer's indicate

13:11, May 11

13:14, May 11

Cherry Ann B: May I know what quickbooks version are we using?

13:14, May 11

13:15, May 11

You: again that is listed on chat I am looking at print out QB2020

13:15, May 11

13:17, May 11

Cherry Ann B: After reviewing your issue and your account, it looks like the problem we're working on today isn't included in our customer care policy. The type of software you have is the stand-alone version, meaning it's a do-it-yourself type rather than the kind that comes with a technical support subscription. No need to worry, though, I'm going to do my best to help resolve your concern. We have a couple of options: I can send you an article that will help us resolve the issue, or we can activate a QuickBooks Plus subscription for tech support assistance. Which one would you like to hear more about?

13:17, May 11

13:18, May 11

You: If you are going to send me Tool hub do not bother I have run that three times how do I print out this chat the widow is very small and hard to work in

13:18, May 11

13:19, May 11

Cherry Ann B: You have that option in the + sign in the chat box.

13:19, May 11

13:21, May 11

You: What would be the 1st 4 steps you would do to try to solve thia problem

13:21, May 11

13:24, May 11

Cherry Ann B: Solution 1: Run the QuickBooks Print & Print Repair Tool from the QuickBooks Tool Hub
Solution 2: Reset your temp folder permissions
Solution 3: Check to see if the reconcile window is off of the screen
Solution 4: Test, reinstall, and adjust permissions for XPS Document Writer (for users who use Windows but not Terminal Services)

13:24, May 11

13:25, May 11

You: do you have a # for support that I can call or do I have to choose get a call back instead of chat

13:25, May 11

13:28, May 11

Cherry Ann B: Unfortunately we no longer have a direct phone number for phone support however you can use our callback feature inside quickbooks Help>QuickbooksdesktopHelp>Type your question> on the lower part click on contact us

13:28, May 11

13:34, May 11

You: Here is the solution to this problem (1) Go to chart of accounts (2) Select any account go to reports select Quick Report (3) select save as PDF in drop down list at print button (4) Name file save to desktop or anywhere you want I cannot believe every tech I chatted with does not know this

13:34, May 11

13:36, May 11

Cherry Ann B: Did you see that in quickbooks desktop help?

13:36, May 11

13:40, May 11

You: No nothing like that is in there I went to the community and that response came back to me in about an hour. Apparent most of you tech do not have that information you are the 3rd or fourth one I chatted with thank you for you time.

You: yes

10:00, May 7

10:02, May 7

Trixia Marie R: Okay, we are going to check if you will have the same option on the sample file, close your company file and open a sample file please

10:02, May 7

10:06, May 7

You: I have this same proble on three desktops but ok

10:06, May 7

10:08, May 7

Trixia Marie R: Thank you

10:08, May 7

10:09, May 7

You: Tried opening a sample company says password incorrect for intuit account it is not

10:09, May 7

10:09, May 7

Trixia Marie R: you don't have to login to your intuit account to open a sample file, just skip it

10:09, May 7

10:10, May 7

You: ok thanks

10:10, May 7

10:11, May 7

You: still grey

10:11, May 7

10:12, May 7

Trixia Marie R: Okay, and just to clarify your concern, you want to save the Credit Card Register as PDF?

10:12, May 7

10:13, May 7

You: i want to save any file i choose to save as pdf by clicking on save as pdf

10:13, May 7

10:14, May 7

Trixia Marie R: So no just the CC register, you want all forms and reports to be save as PDF?

10:14, May 7

10:14, May 7

You: Of course

10:14, May 7

10:16, May 7

Trixia Marie R: Okay, so you mentioned that you already talked to one our Intuit Support last time, what are the troubleshooting steps done before you got disconnected?

10:16, May 7

10:18, May 7

You: I do not know I assumed there was a transcript of that conversation and you had it regardless checking did not go very far.

10:18, May 7

10:19, May 7

Trixia Marie R: Let me check, bear with me

10:19, May 7

10:19, May 7

Trixia Marie R: While Checking, please answer the following Questions. - how many company files are you working on? - how many employees do you have? - How convenient it is for you to be able to access your company files anywhere or working from home?

10:19, May 7

10:21, May 7

You: no problem I will be back in 5 min and I am not going to answer those questions have nothing to do with this problem

10:21, May 7

10:24, May 7

Trixia Marie R: I understand and thank you for waiting, as I check on the previous case here, it seems like the representative just asked you to check the printer setup in QB. Have you already check the printer settings from your control panel?

10:24, May 7

10:31, May 7

You: Printer is Epson WF-3640 set as default XPS writer is in device list I tried making that default no change also checked both devices are operating correctly as I stated when I run tool box it says XPS driver not available or cannot find.

10:31, May 7

10:33, May 7

You: I am in the sample company printer prints out register correctly.

10:33, May 7

10:34, May 7

Trixia Marie R: You can't just save it as PDF. What is your PDF provider?

10:34, May 7

10:35, May 7

You: I do not understand the question

10:35, May 7

10:36, May 7

Trixia Marie R: what is your PDF provider, is it ADOBE?

10:36, May 7

10:36, May 7

You: yes

10:36, May 7

10:36, May 7

Trixia Marie R: what

10:36, May 7

10:36, May 7

Trixia Marie R: What is the version of your ADOBE PDF reader?

10:36, May 7

10:37, May 7

You: I have no Idea

10:37, May 7

10:39, May 7

Trixia Marie R: you can check the version of you Adobe reader from the control panel and if you don't have the latest version, we need to update it to the latest version and run the PDF repair tool. And Is this your first time attempting to save a PDF file after upgrading to QB 2020?

10:39, May 7

10:40, May 7

You: yes adobe version 20.006.20042

10:40, May 7

10:41, May 7

Trixia Marie R: you need to have the "ADOBE Acrobat Reader DC", that is the latest version. And Is this your first time attempting to save a PDF file after upgrading to QB 2020?

10:41, May 7

10:42, May 7

You: yes

10:42, May 7

10:44, May 7

Trixia Marie R: Okay, one moment please

Chat Case 547347941

803002964666399

10:44, May 7

10:44, May 7

You: no problem

10:44, May 7

10:50, May 7

Trixia Marie R: Thank you for waiting, I'm going to provide you the link on where you can download the latest version of ADOBE PDF reader. <https://get.adobe.com/reader/otherversions/>

10:50, May 7

10:50, May 7

You: I thought you just said that was the latest version

10:50, May 7

10:52, May 7

Trixia Marie R: ADOBE Acrobat Reader DC is the latest version.

10:52, May 7

10:55, May 7

You: Installed on 3/18/2020 but I will get the latest how do I get back to you and not have to answer all these question again if that does not work

10:55, May 7

10:56, May 7

Trixia Marie R: In case we get disconnected, I will just provide you the case# as a reference

10:56, May 7

10:56, May 7

Trixia Marie R: Case# 547347941

10:56, May 7

1st call chat
2nd call sat Disconnected chat
3rd call phone T P S C
4th call phone Three Position Step Cant
Ray Arpin

① Cannot convert complet files to PDF

② Must be done from Reports

③ Save As name it and send it to any place you want it Desktop/ Documents or wherever

4th call Jackie Millana jm

Then you send out a email has a link to continue chat We're having trouble opening this page