

Joana Pinto Minimize End conversation

Info at 10:00, Feb 20:

Please wait while we connect you.

Info at 10:00, Feb 20:

Joana Pinto joined the conversation.

Joana Pinto at 10:00, Feb 20:

Welcome to Intuit, you've reached our UK support for QuickBooks Online.

How may I help you today?

You at 10:01, Feb 20:

Hello Joana, I was talking to another agent, who asked me to reset my QB desktop App data on an issue with VAT summary lines

Read

You at 10:01, Feb 20:

That reset disconnected the Chat window

Read

You at 10:02, Feb 20:

I think their name started with Vin

Read

Joana Pinto at 10:02, Feb 20:

Hi Colin, I will do my best to help you.

The issue you are struggling at the moment is, whenever you create a bill, the VAT amount is not showing correct?

You at 10:03, Feb 20:

OK Joana, I have spent around 30 minutes on this issue with the previous agent. I am not reluctant to go through the whole scenario again

Read

Joana Pinto at 10:04, Feb 20:

Let me check the previous case please. I will have a look, I understand you don't want to repeat yourself.

You at 10:05, Feb 20:

when I create a new PO or Bill, the VAT summary display between the subtotal and total is missing even after I have entered all the items

Read

You at 10:05, Feb 20:

The total doesn't include the VAT

Read

You at 10:05, Feb 20:

If I save the PO or Bill the summary line shows the total including VAT

Read

You at 10:05, Feb 20:

if I edit the PO or Bill the form shows the VAT Summary

Read

Joana Pinto at 10:06, Feb 20:

Correct, got you. Tell me something please, the VAT code selected it "S" for standard 20%?

You at 10:06, Feb 20:

If I amend the PO or Bill such as adding a new item or changing the rate on an existing item, the VAT summary disappears again

Read

You at 10:06, Feb 20:

and yes I am using the standard QB supplied TAX code of S for 20%

Read

Joana Pinto at 10:07, Feb 20:

Did your QBO account was migrated from Desktop, even if it was a long time ago?

You at 10:07, Feb 20:

Yes it was. I migrated at least two years ago, maybe more

Read

You at 10:08, Feb 20:

As I told the other agent, I was using QB yesterday without any issue

Read

Joana Pinto at 10:08, Feb 20:

Ok, one last question please, if you open, for example, an invoice, it shows the VAT amount, is that right?

You at 10:08, Feb 20:

I have checked the Audit log and no settings changes have been done

Read

You at 10:08, Feb 20:

Yes that is correct

Read

Joana Pinto at 10:10, Feb 20:

Thank you Colin.

So, I will not bother you with more troubleshooting steps because your answers help me identify this belongs to an issue already known by us.

To explain you so that you better understand, even though yesterday it was working perfectly, we are currently having accounts, that were migrated a long time ago from Desktop to QBO that need to have a VAT refresh.

You at 10:10, Feb 20:

What does that mean

Read

Joana Pinto at 10:11, Feb 20:

That VAT refresh has to be done, by our back end team and will sort out the issue straight away.

Refreshing the VAT codes I mean, nothing will disappear from your account, every transaction created will remain intact, you need just to refresh the VAT codes that were migrated a long time ago from Desktop, which is getting you stuck on the bills.

You at 10:12, Feb 20:

I am extremely concerend about this. I do not think changing VAT settings in the backgournd is acceptable.

Read

You at 10:13, Feb 20:

I am responsible for the correct VAT being sent and paid to HMRC.

Read

You at 10:13, Feb 20:

I as a result of QB doing background changes, I sudeenly have VAT errors and discrepancies appearing. It is me that is liable

Read

Joana Pinto at 10:14, Feb 20:

We will not change the VAT settings, as I mentioned, we will just refresh the VAT codes, nothing will be changed and everything related to what have been done so far will remain completely intact.

You at 10:15, Feb 20:

How does "refreshing" codes not affect anything. If it doesnt affect anything, why is it necessary

Read

You at 10:16, Feb 20:

I think if I told HMRC VAT that QB is refreshing the codes but nothing is changing, they will ant to take a very close look at why and what has changed

Read

You at 10:16, Feb 20:

So tell me exactly what this refresh is doing. what is different between the old and the new

Read

Joana Pinto at 10:19, Feb 20:

Colin, the error you are getting, vat amount not showing on the bills, comes with the migration that was done, I was careful to explain you this along the way.

For example, the "S" that identifies the Standard 20%, on a regular QBO account it doesn't show the same way, because on the time you were with Desktop, that was the way VAT codes were identified on Desktop.

I will reinforce, that I totally understand that this might sound strange since yesterday everything was working, but the issue is identified by our back end team.

There is a solution and an investigation that handles this whole process and therefore I'm presenting this solution for you, because it is what it will solve the issue. After the VAT codes are refreshed on the account, on the bills and in everything else, the vat amount will show.

Joana Pinto at 10:20, Feb 20:

The refresh will only, to rename the VAT codes as they are on a regular account on QBO. For example, the "S" is now called 20% S, and this is what is done by the refresh and nothing more.

You at 10:21, Feb 20:

This makes no sense whatsoever

Read

You at 10:21, Feb 20:

Why do you need to rename a VAT code?

Read

Joana Pinto at 10:22, Feb 20:

I understand, but this is the explanation that I can provide you, based on the whole process of investigation that it's being handled by our back end team.

It will be up to you if you allow me to move forward with the escalation.

You at 10:22, Feb 20:

Why does renaming a VAT code affect the display of the VAT dues on a PO or Bill, that suddenly appears when that Bill is saved and re-edited.

Read

You at 10:22, Feb 20:

I want this escalated

Read

You at 10:23, Feb 20:

I also want a statement from Quickbooks by email on the changes of VAT codes and VAT processing so that I can present this to HMRC as proof that should any discrepancies happen, it was due to QB and not Logicwave.

Read

You at 10:24, Feb 20:

You just DO NOT DO BACKGROUNDCHANGES to fundamentals like TAX and VAT without telling anyone#

Read

Joana Pinto at 10:24, Feb 20:

QuickBooks will not send you a statement that the VAT codes were changed, what you can do, for you to have a proof on what have been done is to download the transcript of this chat conversation in which I confirm it will be need to have a refresh on the VAT codes.

Joana Pinto at 10:25, Feb 20:

I will also reinforce, that everything outside of the VAT codes that QuickBooks has on the account, will remain intact, and by this I mean, transactions, VAT returns, etc.

You at 10:25, Feb 20:

Oh no. That is not acceptable.

Read

You at 10:26, Feb 20:

If there is no email forthcoming, that details exactly what QB has changed and the reasons for that change. Then I will start to make a lot of noise on Social Media and the forums

Read

Joana Pinto at 10:26, Feb 20:

I do apologise but the situation was properly explained on the course of our chat interaction.

You at 10:27, Feb 20:

I hardly think HMRC will accept a transcript of a level 1 support person as legal proof

Read

You at 10:27, Feb 20:

I want this matter escalated

Read

You at 10:29, Feb 20:

And what is the point of changing a rate to 20.0% ECG when we are leaving the EC anyway.

Read

Joana Pinto at 10:29, Feb 20:

Colin, I will reinforce, the situation was properly explain, I will not extend the explanations provided.

If you wish, I will be more than glad to proceed with the escalated to our back end team so that the issue can be fixed according to the investigation we have.

For that escalation to happen and for our back end team be able to refresh the VAT codes, you will need to grant us the access to the account by adding us, UK Care Team, as a user of the account.

You at 10:30, Feb 20:

Just one moment, first you tell me that the refresh is happening in the background?

Read

You at 10:30, Feb 20:

I do not need to do anything

Read

You at 10:30, Feb 20:

No I have to "grant you access" to my account so you can do this "refresh"

Read

Joana Pinto at 10:33, Feb 20:

At any point of our conversation I told that the refresh happens on the background.

Colin, let me be straight honest with you, we are raising a conflict out of this, and this is not the goal or it shouldn't be. Therefore, the explanations were provided, the guidelines of the investigation, and the way to sort the issue as well.

In order for me to proceed with the escalation, this is how it works, the customer adds us as a user of the company, we are able to access it and refresh the VAT codes and then the issue gets to be fixed. If you disagree on doing this, I will not be able to raise the escalation.

You at 10:34, Feb 20:

Firstly. Your explanation was unclear, imprecise and made no logical sense. There was no context to the change. No reason for the change was given.

Read

You at 10:34, Feb 20:

You stated that the change happens in the background and that there would be no impact

Read

You at 10:35, Feb 20:

Your whole explanation is unclear, misleading and logically nonsense.

Read

You at 10:36, Feb 20:

This matter has now gone way beyond the issue that the PO and Bills are not displaying the VAT summary.

Read

Joana Pinto at 10:36, Feb 20:

As I said, I will not extend the explanations related to the issue occurring.

You at 10:37, Feb 20:

As I told you before. If you are unable to escalate this to someone in QB that can give a clear and precise explanation. I will resort to escalating this through social media and Community and also raise this issue with HMRC

Read

Joana Pinto at 10:44, Feb 20:

Colin, my name is Ariana a supervisor of Joana, and I've been side by side with her on this.

Joana Pinto at 10:45, Feb 20:

I know that you are concerned on everything that is going to on with your VAT, and I do understand your point, believe me.

Joana Pinto at 10:45, Feb 20:

However my main goal is to ensure that everything falls into place correctly.

Joana Pinto at 10:48, Feb 20:

Being such, as you know that Desktop and QuickBooks Online Accounts are different, so VAT, accounts etc are different in each.

So in order to ensure that your VAT and transactions after migrating fall into the correct accounts, we complete a refresh (basically this refresh allows us to correct the VAT codes within QB.

Joana Pinto at 10:49, Feb 20:

But rest assured Colin, we do not make any changes on your transaction, all we want to achieve is that it's correct to you and HMRC.

You at 10:51, Feb 20:

Firstly, I migrated to QB online over 2 years ago. If my VAT rate was incorrect, then it has been incorrect for over that whole period

Read

You at 10:52, Feb 20:

Now you tell me that QB has decided to "refresh" rates so to ensure that the VAT is recorded properly.

Read

You at 10:53, Feb 20:

Exactly who will tell me that the rate I have been using is incorrect and all the VAT records I have done so far through QB are incorrect and need to be amended?

Read

You at 10:55, Feb 20:

Can you show me any documentation in QB and any advice on the use of these "refreshed" rates?

Read

Info at 11:00, Feb 20:

It's taking longer than we expected to respond. We'll help you as soon as we can.

Joana Pinto at 11:00, Feb 20:

We have the refresh procedure to ensure that situations just as you presented today, are prevented in future this is the process we take so that you're not prompted with errors.

Joana Pinto at 11:01, Feb 20:

This is an internal procedure, and these are the guidelines we're following.

You at 11:01, Feb 20:

So let me get this straight

Read

You at 11:02, Feb 20:

QB has changed its Standard Set of VAT codes in the UK

Read

You at 11:02, Feb 20:

They have a display name like 20.0 % S

Read

You at 11:03, Feb 20:

I have an "old Standard" Tax Rate S

Read

You at 11:03, Feb 20:

They are the same

Read

You at 11:03, Feb 20:

If I continue to use S, I will get errors in QB

Read

You at 11:03, Feb 20:

is that correct?

Read

Joana Pinto at 11:08, Feb 20:

Without the VAT refresh done, in QuickBooks you will continue to see the errors that you contacted us today about.

As Desktop and QuickBooks Online are different software's features like VAT codes, accounts etc... are not the same.

But this has no effect externally, (HMRC),

You at 11:09, Feb 20:

So you are telling me that if I don't use the standard set of QB Codes. QB is not going to display my data correctly?

Read

You at 11:10, Feb 20:

But you are guaranteeing that the VAT transaction data will still be correct

Read

Joana Pinto at 11:14, Feb 20:

Yes, basically we are going to give the VAT codes a refresh (so this entails, that we have it show as 20% S) instead of just "S"

But this does not edit or change anything that you have recorded, you can rest assured of that.

Joana Pinto at 11:14, Feb 20:

We would not give you this option if we know it would have a negative affect on records you have entered.

You at 11:16, Feb 20:

Firstly It doesn't sound like it is an option. If I dont use yuor standard code, I dont get to see the data propley displayed. But I will have to assume that the transaction data is still being done correctly
Read

You at 11:16, Feb 20:

You are not giving us this option, you are imposing the option.

Read

You at 11:17, Feb 20:

Alos to get this "refresh" I have to let you onto my account, why am I unable to do this refresh myself?

Read

You at 11:17, Feb 20:

There has been no public announcement about this refresh and its implications that I can see

Read

Joana Pinto at 11:18, Feb 20:

Colin, we are not implying that you "Have" to do so, we are giving you the option to agree to do the refresh, so that the codes are correctly displayed.

Joana Pinto at 11:18, Feb 20:

This is an internal procedure, we do for you.

You at 11:19, Feb 20:

It is not an internal procedure at all. I have to submit tou giving access to my account to a third party so add Tax codes that the only difference appears to be the name

Read

You at 11:20, Feb 20:

what if I renamed my S code to "20 % S" would that stop the display problems?

Read

Joana Pinto at 11:20, Feb 20:

No.

You at 11:20, Feb 20:

why?

Read

Joana Pinto at 11:24, Feb 20:

Because on your side you do not have the option to edit default rates (you are not given the option to do so)

Being the case, we (with your permission of course) are able to correct the display for you so that it's displayed correctly.

You at 11:25, Feb 20:

Sorry, I have just gone intot he Edit Tax Rate and I am able to change the 20% to 21%

Read

You at 11:26, Feb 20:

So what rate are you talking about that I am unable to change, but you are. How is this possible, what privileges do you have that I dont on my account

Read

Joana Pinto at 11:26, Feb 20:

In editing the default rate, this then does not comply with HMRC rates.

You at 11:27, Feb 20:

Yes that is obvious

Read

Joana Pinto at 11:27, Feb 20:

Exactly so, we do not want you to be penalized by HMRC by editing the rates.

You at 11:28, Feb 20:

This is getting surreal

Read

You at 11:29, Feb 20:

You want to come onto my account. Add a Tax rate called 20.0 % S, that is exact;y the same as S, goes to the same accounts has the same rates

Read

You at 11:29, Feb 20:

Then leave.

Read

You at 11:29, Feb 20:

Then I can go intot he rate and chage it fi I so want to?

Read

Joana Pinto at 11:31, Feb 20:

Colin we are not going to be adding any rates.

We are going to correct the display of "S" to show as 20% S.

Everything still goes to the same accounts and your transactions are still the same.

Joana Pinto at 11:31, Feb 20:

We don't do anything else other than fix the rate for you.

You at 11:31, Feb 20:

The rate doesnt change

Read

You at 11:31, Feb 20:

it is 20%

Read

Joana Pinto at 11:31, Feb 20:

Then we let you know once it's done and we do not login to your account thereafter

You at 11:32, Feb 20:

So you do not trust me to rename my Tax rate description from "S" to "20% S"

Read

Joana Pinto at 11:32, Feb 20:

Colin I just want to help you so that you no longer get the errors and so that the display is correct.

You at 11:34, Feb 20:

NO you are not. You are aksin me to give you access to my account. You say that only you can do the change, but tell me that the only change is a siplay change and that this display name change will make the VAT Summary line suddenly appear on the PO and Bill

Read

Joana Pinto at 11:37, Feb 20:

It's not a matter of trust.

I know that you know what you're doing, and I know you're concerned with the process as it's your account and details.

The procedure is to correct the display so that you can then in fact have the summary of VAT on transactions.

Joana Pinto at 11:37, Feb 20:

But it's completely up to you to allow us to do that or not.

Joana Pinto at 11:37, Feb 20:

And if it's something you do not wish, we will leave it here

You at 11:38, Feb 20:

So in Summary and I would like your reaction the summary as to whether it is correct or not.

Read

You at 11:39, Feb 20:

The reason that when I open a new PO or Bill and do not see any VAT total information on the form is because the Tax Rate display I am using is not in a QB format.

Read

Joana Pinto at 11:40, Feb 20:

Correct.

You at 11:41, Feb 20:

In order to make the Tax Rate to the correct format, I have to grant you access to the account. Simply so that you can go into the Tax Rate and change the display from the current display to the QB standard

Read

You at 11:41, Feb 20:

You cannot allow me to do this same process, because I might not do it correctly

Read

Joana Pinto at 11:44, Feb 20:

It's nothing that we don't trust you (I do)

But it is something that our engineers do for you, so yes we would only need to access your account so that we can correct the display for you so that everything falls into place and so that you have all the features to see VAT even on P.O's

You at 11:46, Feb 20:

You supply me with the correct display, I will change the display to that.

Read

Joana Pinto at 11:46, Feb 20:

Unfortunately that is not possible Colin.

You at 11:47, Feb 20:

Why not

Read

You at 11:47, Feb 20:

Am I not able to type in a description properly

Read

Joana Pinto at 11:47, Feb 20:

As I said before this is something that needs to be done internally so that it's done in compliance all HMRC regulations.

Joana Pinto at 11:48, Feb 20:

Please let me know if you will comply with this or not, so we can move on.

You at 11:49, Feb 20:

I am puzzled that you are not able to see how much of a nonsense this is.

Read

You at 11:49, Feb 20:

You allow me to change Tax Rates, its description. Just about anything I like

Read

You at 11:50, Feb 20:

You tell me that the change has to be done by QG personnel, because HMRC dictates that

Read

You at 11:50, Feb 20:

>QG = Quick Books

Read

You at 11:50, Feb 20:

and there is nothing stopping me altering that once you have done it

Read

You at 11:50, Feb 20:

and the change is a description only

Read

Joana Pinto at 11:51, Feb 20:

Joana and I have presented a full explanation, a brief on exactly what is done and the result of what you will achieve in doing the refresh.

What I would like to know if it is something we can do for you or not, I do not wish to take any more of your time.

Please let me know how you'd like to proceed

You at 11:52, Feb 20:

This whole conversation is incredible. It is going to appear on the community as soon as I can get it.

Read

You at 11:53, Feb 20:

You are in a loop. Your answers make no logical sense. You are unable to progress beyond repetition.

Read

Joana Pinto at 11:54, Feb 20:

As long as all our procedures are being followed, correctly, I will leave this on your end. As mentioned, we will not extend the explanations provided, so on this case, and again, it will be up to you to proceed or not.

You at 11:57, Feb 20:

You give me the description that the Tax rate should have to display the VAT information correctly.

Read

Joana Pinto at 11:57, Feb 20:

As I mentioned before that is not possible.

Joana Pinto at 11:57, Feb 20:

Please advise if you'd like to do the refresh or not

You at 12:00, Feb 20:

From your answer above, the change which you want to do is not a simple change to a description. In which case until you are able to tell me in precise detail what changes you team is going to do, and I mean all changes. Then I will not grant you access to my company account.

Read

Joana Pinto at 12:00, Feb 20:

And I respect your decision.

You at 12:02, Feb 20:

Furthermore should any discrepancies appear in QB VAT processing I will use this as evidence that QB has been negligent. I will also send this transcript to HMRC VAT for their comments

Read

Joana Pinto at 12:03, Feb 20:

We have followed and presented to you every detail and result of doing the refresh, however as your decision is to not proceed with this we respect that.

You at 12:04, Feb 20:

So to be absolutley certain that I haven't misunderstood your clear explanation.

Read

You at 12:05, Feb 20:

You need to "refresh" the Tax Rates on my account at QB Online. Which has been operating for over two years.

Read

You at 12:06, Feb 20:

This refresh involves updating only the Tax Rate description or the addition of a new rate that is exactly the same at the old rate but with a different description

Read

You at 12:07, Feb 20:

This change can only be performed by QB customer care team and this means granting access to my Company Accounts to the QB Customer Care team

Read

Joana Pinto at 12:08, Feb 20:

As long as all our procedures are being followed, correctly have followed and presented to you every detail and result of doing the refresh, no further emphasis on this will be done.

You at 12:08, Feb 20:

And the only reason for this refresh as you call it, is to fix a display issue on the PO and Bill template form?

Read

You at 12:08, Feb 20:

What procedures?

Read

Joana Pinto at 12:08, Feb 20:

Again, no further explanations will be provided on this matter.

You at 12:09, Feb 20:

So you are saying my understanding is incorrect?

Read

Joana Pinto at 12:11, Feb 20:

No further explanations will be provided on this matter Colin. Apologies, but we are discussing this same exact issue for more than 2 hours, not reaching into any certain point. So, I will reinforce, explanations were provided, we respect your decision and we will not move forward with the escalation.

You at 12:12, Feb 20:

You are unable to tell me that my understanding of this issue is incorrect or not

Read

Joana Pinto at 12:13, Feb 20:

Your decision is not to proceed as you understood what we explained.

I respect your decision and no further action will be done

Enter text here