What this is: Twelve ready-to-send email templates for the most common support tickets you'll get in Year 1. Copy each as-is, swap the bracketed bits, hit send. Saves you 5–10 minutes per ticket and ensures tone stays consistent.

Tone rules: Use first names. Apologize when there's actual fault but never grovel. Keep it short — most users skim. Offer ONE specific next step, not a menu of options. Sign with your real name, not "Support Team."

#1 — When they say:

Subject: Re: Login trouble — let's get you back in

Hi [Name],

Sorry for the friction. The most common cause is either a typo in the email or an unverified email address. Two quick things to try:

1. Use the "Forgot password" link on the login page — you'll get a reset link in your inbox.
2. If you signed up but never clicked the email verification link, check your spam folder for an email from *noreply@thegettingaheadguidebook.com*.

If neither works, reply to this email and I'll dig into your account manually.

— Randy

#2 — When they say:

Subject: Re: Password reset — done

Hi [Name],

I just triggered a fresh password-reset email to [email]. Check your inbox (and spam folder, just in case) — the link expires in 2 hours.

If it doesn't show up within 5 minutes, let me know and I'll look at the email logs on my side.

— Randy

#3 — When they say:

Subject: Re: Duplicate charge — let me check

Hi [Name],

Apologies for the alarm. The two charges you're seeing are almost certainly:

(a) Your $0 authorization at trial signup (refunds automatically in 3–5 business days), OR
(b) A genuine duplicate which I can refund right now.

I just pulled up your Stripe history and I see [N] charges on [dates] for [$amounts]. [Confirm legit / I've refunded the duplicate — Stripe will return it to your card within 5–10 business days].

Sorry again for the worry.

— Randy

#4 — When they say:

Subject: Re: Cancelling your subscription

Hi [Name],

Easy — you can cancel anytime from inside the app:

1. Click your name in the top-right corner of the app
2. Click **Manage Subscription**
3. Click **Cancel Subscription** — you'll keep access until the end of your current billing period.

If you'd rather just tell me why, I'd genuinely love to hear what didn't work for you — it's how I make the app better. No pressure either way.

— Randy

#5 — When they say:

Subject: Re: Refund — happy to help

Hi [Name],

Sorry The Getting Ahead Guidebook wasn't the right fit. I've issued a full refund for your last [monthly/annual] charge — Stripe will return it to your card within 5–10 business days.

Your access stays active through the end of the period you've already paid for. If there's something specific I could have done better, I'd love a one-sentence reply — no obligation, just helps me improve.

All the best,
— Randy

#6 — When they say:

Subject: Re: Getting started — let me walk you through it

Hi [Name],

The confusion you're describing is super common in week 1 — this app uses a different approach than Mint or YNAB, and the "aha" moment usually clicks once you see The Big Picture page in action.

Three quick things that should clear it up:

1. Open the **Plan** → **Flowchart** page. It's a visual map of how money flows through the app.
2. Print the Pre-Entry Worksheets (Plan → Pre-Entry Worksheets). Filling these out on paper FIRST makes everything click.
3. Watch this 4-min walkthrough: [LINK]

If you're still stuck after that, reply with one specific question and I'll record a 60-second screencast just for you.

— Randy

#7 — When they say:

Subject: Re: Data export — yes, anytime

Hi [Name],

Yes — your data is yours and you can export it anytime.

Full backup (JSON): Click your name in the top-right corner → **Download Backup**. This is a complete export you can restore later or open in any text editor.

Per-month CSV (for spreadsheets): Open the Reports menu → choose your month → click the CSV export button.

Holler if you'd like a different format.

— Randy

#8 — When they say:

Subject: Re: The income tax reserve

Hi [Name],

Great question. If you've marked any of your income as 1099/self-employed (rather than W-2), the app automatically sets aside an estimated percentage of each paycheck for federal + state income tax + self-employment tax.

You can adjust the % or turn it off entirely:
Plan → **Income Taxes** → enter your effective rate, or set to 0% if you'd rather track tax separately.

If you're 100% W-2, your employer already withholds taxes, so you don't need this feature. Just set the rate to 0.

— Randy

#9 — When they say:

Subject: Re: Adding a credit card

Hi [Name],

In this app, a credit card is just another "Account" — same as your checking or savings. Here's the quickest way:

1. Open **Money** → **Accounts**
2. Click **+ Add Account**
3. Set **Type = Credit Card**
4. Enter the current balance OWED as a negative starting balance (e.g., -1,234.56 if you owe $1,234.56)

From there, all charges on that card become expenses on that account, just like debit/checking.

— Randy

#10 — When they say:

Subject: Re: Recovering deleted data

Hi [Name],

Good news: I keep a daily automated backup of every account, and I can restore yours to any point in the last 30 days.

To do it I need:

1. The date/time the deletion happened (approximately)
2. Confirmation that you've made your OWN manual backup of your current state (top-right menu → Download Backup) BEFORE I restore — so we don't lose anything you've added since.

Reply with both and I'll get it done within 24 hours.

— Randy

#11 — When they say:

Subject: Re: Your data security

Hi [Name],

Great question. Quick summary:

• Your data is stored in MongoDB Atlas (encrypted at rest), hosted in the US.
• Every connection between your device and our servers is HTTPS-encrypted.
• Passwords are stored as bcrypt hashes — we cannot see your actual password, even with admin access.
• We do NOT connect to your bank account or read your real-world transactions — everything you enter is manual, by design.
• You can delete your account anytime (top-right menu → Settings → Delete Account), which permanently erases everything.

Full privacy policy is at thegettingaheadguidebook.com/privacy.

— Randy

#12 — When they say:

Subject: Re: Sharing access with your spouse

Hi [Name],

Yes — and the simplest way right now is to share one account login. Your subscription covers both of you regardless of which device logs in.

Practical tips:
• Use a shared password manager entry (1Password, Bitwarden, Apple Keychain) so you both have it.
• Either of you can be logged in on phone + web simultaneously — changes sync.
• If a multi-user/family-plan setup would help, reply and tell me how you'd want it to work — I'm building that feature based on real requests.

— Randy