

How to write a recovery report

For full-edition partners. Your tech fills in the report during a scam or break-in job, and the customer leaves with a PDF in your name: what happened, what you fixed, what they still need to do with the right phone numbers, and the facts their bank, the FTC and the FBI will ask for.

Open it

1. Sign in to your organization page and press the **Recovery reports** tile, then **Open the recovery report**.
2. Everything you type stays in that browser tab and is never sent to us.

Fill it in during the job

1. **The job.** The customer's name, your tech, the date, and the **state the customer lives in**: the report lists that state's fraud and consumer-protection numbers.
2. **What happened.** How it started (a pop-up, a call, an email) and what the customer gave the scammer: remote access, a code, a payment.
3. **Timeline.** Add each moment with its time. Banks and the FBI ask for times.
4. **What you found** and **The work.** Tick each check and fix as you do it, and add notes.
5. **What the scammer used.** Phone numbers, websites, remote-access IDs and payment details as the customer saw them. Never type passwords or full card or account numbers: the page refuses long numbers.
6. **To finish.** What the customer still needs to do, such as calling their bank, freezing their credit, or changing a password at home.

Hand it over

1. Press **Build the customer's report (PDF)**, then print it or email it to the customer.
2. Press **Save job file** if you'll finish later; open it again to continue. Press **New job** to start the next customer with a clean page.
3. Offer the customer a personal playbook too: **Build one with a client now** on your organization page, so they're ready next time.

Stuck?

Email jeff@jcady.org or call (520) 223-9878 ext. 800, and say which page you're on. We'll never ask for a password, a code from your phone, or a card number.