



# THOMSON REUTERS GUIDE TO CUSTOMER SUPPORT

**Copyright © 2005-2021 Thomson Reuters. All Rights Reserved**

Although reasonable care has been used in preparing this document, Thomson Reuters makes no warranty, express or implied, that any information contained herein is current, accurate or complete. The most current version is made using the following link: [Guide to Customer Support](#). This document contains information proprietary to Thomson Reuters and may not be reproduced, transmitted, or distributed in whole or part without the express written permission of Thomson Reuters.

Acknowledgment is made to all other brand or product names referred to in the text that are registered trademarks, trademarks, or trade names of their respective owners.

GUIDE TO CUSTOMER SUPPORT .....	1
SUMMARY .....	1
WHAT IS COVERED BY THIS GUIDE - SUPPORT .....	2
PRODUCTS SUPPORTED .....	2
STANDARD AND PREMIUM SUPPORT .....	2
CONTACTING SUPPORT .....	5
SUPPORT HOURS AND HOLIDAYS .....	6
SUPPORT HOURS AND HOLIDAYS .....	6
PRODUCTS SUPPORTED BY SUPPORT LOCATION .....	10
LANGUAGES SUPPORT BY PRODUCT .....	12
CASE MANAGEMENT .....	14
CUSTOMER ON PREMISE IT INFRASTRUCTURE .....	14
SUPPORT PROCEDURES .....	15
AUTHORIZED SUPPORT CONTACTS POLICY .....	15
ADDITIONAL REQUIREMENTS FOR THOMSON REUTERS SOFTWARE .....	15
SUPPORT POLICIES .....	15
INITIAL GO-LIVE & UPGRADE POLICY .....	15
AUTHORIZED SUPPORT CONTACTS POLICY .....	15
COLLABORATION POLICY .....	16
RESTORAL TIME SLA POLICY .....	16
RESTORAL TIME SLA GUIDELINES AND SCENARIOS .....	16
TRANSITION TO SUPPORT .....	16
TESTING .....	16
CLOUD ENVIRONMENT NOTIFICATION POLICY .....	16
OUTAGES .....	16
MAINTENANCE .....	17
3RD PARTY IT SUPPORT POLICY .....	17
SUPPORT INCIDENT PRIORITY LEVELS AND RESPONSE/RESTORAL SLAS .....	18
SUPPORTED ENVIRONMENTS .....	19
PRODUCT RELEASES .....	19
WHAT IS NOT COVERED BY THIS GUIDE - SUPPORT .....	19

# GUIDE TO CUSTOMER SUPPORT

## SUMMARY

On behalf of the Customer Support Team, welcome to Thomson Reuters. We are committed to providing best-in-class service and support to help you maximize the benefits of our Thomson Reuters Products. Our services include product support requests, product and content updates, and access to our 24x7 web-based knowledge base.

This guide provides information covering support services, guidelines, policies, and procedures. It will help you determine:

- Where you can find technical information
- How you can log a support case
- How you should contact us for answers to questions that need immediate attention.

---

**NOTE:** Where used in this guide, the term *Support* refers to Thomson Reuters Product Support, the term *Solution*, refers to the programs and solutions for Risk, Legal, and Tax; and the term *Customer* refers to the "Licensee and its authorized representatives."

---

# WHAT IS COVERED BY THIS GUIDE - SUPPORT

## PRODUCTS SUPPORTED

Support provides access to several services and resources for the following Thomson Reuters products.

## STANDARD AND PREMIUM SUPPORT

Support provides access to web-based self-help and Frequently Asked Questions 24x7x365. Premium support levels for specific products are available per the terms of the customer contract.

Domain	Product	Standard	Premium
ACA Reporting & Compliance	ACA Reporting & Compliance		
BEPS	BEPS Action Manager		
Corporate Tax	Corporate Tax		
DAC6	DAC6		
Fast VAT	Fast VAT		
Fringe Benefits	Fringe Benefits		
Global Trade Management	Global Trade Management, Latam		
	Global Trade Management, powered by Integration Point		
Income Tax	Data Query		
	Estimated Payments		
	Excel Add-In		
	Express RS		

Domain	Product	Standard	Premium
	Fixed Assets		
	GoSystem Tax RS		
	Income Tax		
	Income Tax International		
	State Apportionment		
Indirect Tax	Indirect Tax		
	Sales & Use Tax Compliance		
	Indirect Tax Compliance		
K-1 Analyzer	K-1 Analyzer		
Indirect Tax Rates	Indirect Tax Rates		
Legal	Tracker		
	Legal One		
	CP-Pro		
Nonresident Alien Tax	Nonresident Alien Tax		
Property Tax	Property Tax		
Risk	Compliance Learning		
	Oden		
	Regulatory Intelligence		
Statutory Reporting	Statutory Reporting		

Domain	Product	Standard	Premium
Tax and Fiscal Brazilian Solutions (Mastersaf)	Tax One		
	DfE (Electronic Invoicing)		
	DW		
	Smart		
	GF		
	eSocial		
	Messaging		
Tax Information Reporting	Tax Information Reporting		
Tax Provision	Tax Provision		
	Uncertain Tax Positions		
Transfer Pricing	Transfer Pricing		
	Operational Transfer Pricing		
Trust & Estate Administration	Trust & Estate Administration		
Trust Tax	Trust Tax		
Trusts (AU)	Trusts (AU)		
Workflow Tools	Audit Manager		
	Calendar		
	DataFlow		

Domain	Product	Standard	Premium
	Entity Manager		
	General Ledger Manager		
	R&D Tax Credit Manager		
	WorkFlow Manager		

## CONTACTING SUPPORT

If, after reasonable efforts, the customer's internal support organization is unable to diagnose or resolve problems or issues, the Customer can contact Customer Support via the methods listed on our [Contacting Support](#) document. Customer Support requires that the customer provide reasonable and necessary access (e.g., access to repository files, log files, or database extracts) to appropriately troubleshoot and provide issue resolutions.

To avoid confusion, any mention of the term *business hour* in this document refers to an hour that takes place during the support hours for the applicable Thomson Reuters Customer Support site as shown in the table under the Support Hours section in this document, and the term "business day" means Monday through Friday, excluding applicable holidays. The Support Hours section within the Thomson Reuters Support site notes any exceptions or additional details.



## SUPPORT HOURS AND HOLIDAYS

### SUPPORT HOURS AND HOLIDAYS

The following support hours represent hours of support for all Thomson Reuters Customer Support Centers. Remember that support for each product may be covered by the hours of support included in individual client contracts and may vary from the general support hours shown on this table. The hours listed below reflect US Central Standard time. Thomson Reuters holidays may affect support coverage. The current list of holidays can be found by clicking here: [Thomson Reuters Holidays](#)

Time/Location	AM											PM												
	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11
United States (US)																								
Brazil (BR)																								
United Kingdom (UK)																								
United Kingdom (GER)																								
India (IN)																								
India (ARA)																								

	AM											PM												
Time/Location	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11
Australia (AU)	█	█	█	█	█												█	█	█	█	█	█	█	█
Philippines (PH)	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
Philippines (CHI)	█	█	█	█	█	█															█	█	█	█
Philippines (JPN)	█	█	█	█	█	█															█	█	█	█

## PRODUCT SUPPORT HOURS OF OPERATION

Domain	Product	Support Hours URL
ACA Reporting & Compliance	ACA Reporting & Compliance	<a href="#">Support Hours</a>
BEPS	BEPS Action Manager	<a href="#">Support Hours</a>
Checkpoint	Checkpoint	<a href="#">Support Hours</a>
Corporate Tax	Corporate Tax	<a href="#">Support Hours</a>
DAC6	DAC6	<a href="#">Support Hours</a>
Fast VAT	Fast VAT	<a href="#">Support Hours</a>
Fringe Benefits	Fringe Benefits	<a href="#">Support Hours</a>
Global Trade Management	Global Trade Management, Latam	<a href="#">Support Hours</a>
	Global Trade Management, powered by Integration Point	<a href="#">Support Hours</a>
Income Tax	GoSystem	<a href="#">Support Hours</a>
	Income Tax	<a href="#">Support Hours</a>
	State Apportionment	<a href="#">Support Hours</a>
Indirect Tax	Indirect Tax	<a href="#">Support Hours</a>
	Indirect Tax Compliance	<a href="#">Support Hours</a>
	Sales & Use Tax Compliance	<a href="#">Support Hours</a>
Indirect Tax Rates	Indirect Tax Rates	<a href="#">Support Hours</a>
K-1 Analyzer	K-1 Analyzer	

Domain	Product	Support Hours URL
Legal	Tracker	<a href="#">Support Hours</a>
Nonresident Alien Tax	Nonresident Alien Tax	<a href="#">Support Hours</a>
Property Tax	Property Tax	<a href="#">Support Hours</a>
Risk	Compliance Learning	<a href="#">Support Hours</a>
	Oden	<a href="#">Support Hours</a>
	Regulatory Intelligence	<a href="#">Support Hours</a>
Statutory Reporting	Statutory Reporting	<a href="#">Support Hours</a>
Tax Information Reporting	Tax Information Reporting	<a href="#">Support Hours</a>
Tax Provision	Tax Provision	<a href="#">Support Hours</a>
Transfer Pricing	Transfer Pricing	<a href="#">Support Hours</a>
Trust & Estate Administration	Trust & Estate Administration	<a href="#">Support Hours</a>
Trust Tax	Trust Tax	<a href="#">Support Hours</a>
Trusts (AU)	Trusts (AU)	<a href="#">Support Hours</a>
Workflow Tools	Workflow Tools	<a href="#">Support Hours</a>

## PRODUCTS SUPPORTED BY SUPPORT LOCATION

Domain	Product	US	BR	UK	IN	AU	PH
ACA Reporting & Compliance	ACA Reporting & Compliance						
BEPS	BEPS Action Manager						
Corporate Tax	Corporate Tax						
DAC6	DAC6						
Fast VAT	Fast VAT						
Fringe Benefits	Fringe Benefits						
Global Trade Management	Global Trade Management, Latam						
	Global Trade Management, powered by Integration Point						
Income Tax	GoSystem						
	Income Tax						
	State Apportionment						
Indirect Tax	Indirect Tax						
	Indirect Tax Compliance						
	Sales & Use Tax Compliance						
Indirect Tax Rates	Indirect Tax Rates						
K-1 Analyzer	K-1 Analyzer						
Legal	Tracker						

Domain	Product	US	BR	UK	IN	AU	PH
Nonresident Alien Tax	Nonresident Alien Tax						
Property Tax	Property Tax						
Risk	Compliance Learning						
	Oden						
	Regulatory Intelligence						
Statutory Reporting	Statutory Reporting						
Tax Information Reporting	Tax Information Reporting						
Tax Provision	Tax Provision						
Transfer Pricing	Transfer Pricing						
Trust & Estate Administration	Trust & Estate Administration						
Trust Tax	Trust Tax						
Trusts (AU)	Trusts (AU)						
Workflow Tools	Workflow Tools						

## LANGUAGES SUPPORT BY PRODUCT

Domain	Product	LANGUAGES							
		ENG	SPA	POR	HIN	JPN	ARA	CHI	GER
ACA Reporting & Compliance	ACA Reporting & Compliance								
BEPS	BEPS Action Manager								
Corporate Tax	Corporate Tax								
DAC6	DAC6								
Fast GTM Powered	Fast VAT								
Fringe Benefits	Fringe Benefits								
Global Trade Management	Global Trade Management, Latam								
	Global Trade Management, powered by Integration Point								
Income Tax	GoSystem								
	Income Tax								
	State Apportionment								
Indirect Tax	Indirect Tax								
	Indirect Tax Compliance								
	Sales & Use Tax Compliance								
Indirect Tax Rates	Indirect Tax Rates								
K-1 Analyzer	K-1 Analyzer								

Domain	Product	LANGUAGES							
		ENG	SPA	POR	HIN	JPN	ARA	CHI	GER
Legal	Tracker								
Nonresident Alien Tax	Nonresident Alien Tax								
Property Tax	Property Tax								
Risk	Compliance Learning								
	Oden								
	Regulatory Intelligence								
Statutory Reporting	Statutory Reporting								
Tax Information Reporting	Tax Information Reporting								
Tax Provision	Tax Provision								
Transfer Pricing	Transfer Pricing								
Trust & Estate Administration	Trust & Estate Administration								
Trust Tax	Trust Tax								
Trusts (AU)	Trusts (AU)								
Workflow Tools	Workflow Tools								



## CASE MANAGEMENT

Only Authorized Contacts may submit a support case. Thomson Reuters defines an authorized contact as an employee or contractor designated by the customer as the customer's representative for submitting support requests and interacting with Customer Support for troubleshooting purposes.

Upon receipt of an incoming problem incident, Customer Support assigns the case to a Support Representative. At this time, you may need to supply additional information to assist the Support Representative with the diagnosis and resolution of the problem (e.g. log files, documentation, error messages). When submitting a request, provide the following information:

### 1. Question/Incident Description

The question/incident description of the problem is the most important information you will provide in this process. Please be as detailed as possible. If there are specific steps to reproduce the problem, include them as well. The better Support can understand the problem initially, the faster the issue can be resolved by the appropriate resource(s). Also, it is critical that you describe any changes to your environment (e.g. ERP upgrades, patches, changes to the technology stack, configurations, etc.) that may have occurred recently.

### 2. Priority Selection

Determine the priority level of your support case according to the Support Incident Priority Levels and Response/Restoral SLAs. The assigned Support Representative or Account Manager may also work with you to determine the appropriate priority level.

ONESOURCE Customers: For Critical or High support requests, we recommend creating a case in [Customer Center](#) with the appropriate [Priority level](#) selection. Outside of business hours, creating a case in [Customer Center](#) with the appropriate Critical or High Priority level will trigger a notification to Support.

Legal Customers: For Critical or High support requests, we recommend using the available resources located in our [Contacting Support](#) document.

Risk Customers: For Critical or High support requests, we recommend using the available resources located in our [Contacting Support](#) document.

### 3. Attachments

If you have any screen shots, log files, error reports or other relevant information in a file you would like to submit, submit them as attachments to your case – this will help expedite the resolution.

## CUSTOMER ON PREMISE IT INFRASTRUCTURE

The customer's network, SAN, server hardware and other IT Infrastructure platform components are generally required to be working properly for the software to perform optimally.

## SUPPORT PROCEDURES

### AUTHORIZED SUPPORT CONTACTS POLICY

Authorized contacts are given unique, named user accounts (no shared or group accounts allowed). Only an authorized contact may submit a support case or access support resources.

### ADDITIONAL REQUIREMENTS FOR THOMSON REUTERS SOFTWARE

For incidents related to your local, company-specific IT configurations, Customer Support offers limited assistance due to the unique technical knowledge required. Please refer to your local IT personnel for further guidance.

It is imperative that authorized contacts have (directly or via their internal IT department) knowledge of the underlying IT infrastructure and technical topography of their implementation to effectively work with Customer Support to analyze, troubleshoot, and resolve customer reported incidents.

## SUPPORT POLICIES

The following policies have been designed to maximize the value of the support experience for our customers by providing standardization and best practices that expedite the resolution of issues.

### INITIAL GO-LIVE & UPGRADE POLICY

If Thomson Reuters Professional Services is not involved or Customer Support has not been notified in advance, support will be best-efforts only and the associated Restoral Time SLA shall not apply.

### AUTHORIZED SUPPORT CONTACTS POLICY

Authorized contacts are employees or contractors designated by the customer as the customer's representative for submitting support requests and interacting with Customer Support for troubleshooting purposes.

To request, change or update authorized contact information at any time, contact support and submit a request.

To effectively make use of the knowledge base, documentation, and live Customer Support, it is critical that authorized contacts receive the appropriate training or have equivalent experience with Thomson Reuters solutions.

Customers who outsource production support to third parties must ensure that such third-party delegates receive appropriate training and that they obtain an account with Support as authorized contacts.

## COLLABORATION POLICY

Thomson Reuters may request that an authorized contact involve one or more of their IT (e.g. network administrator, DBA, etc.) or business resources in the troubleshooting of a support incident. This will be done when a complicated support issue requires the involvement of additional technical or business resources with knowledge, skills, or system access that the authorized contact doesn't possess. The absence of a requested IT or business representatives from the customer may negatively impact incident resolution times and may void the SLA guarantees on the support incident in question.

## RESTORAL TIME SLA POLICY

The overarching objective of the Restoral Time SLA is to return the customer's production environment to working order within the allowed time limit. Familiarize yourself with Standard Support Incident Priority Levels and Response/Restoral SLAs and Premium Support Incident Priority Levels and Response/Restoral SLAs before proceeding to review the rest of this policy.

An important tenet of this objective is that, in certain situations, such as during a production upgrade to a new version, Customer Support will recommend a rollback to a prior working version of software to restore production service, rather than attempting to troubleshoot the issue.

The following guidelines and scenarios are provided to help customers better understand and plan for contingencies.

## RESTORAL TIME SLA GUIDELINES AND SCENARIOS

### TRANSITION TO SUPPORT

Where applicable, if a sufficient transition to support did not occur, support will be best efforts only and the associated Restoral Time SLA shall not apply.

### TESTING

As part of troubleshooting a production issue that occurs immediately after an upgrade or other significant change to production, Customer Support asks the customer to document if the issues were seen in a test environment prior to the upgrade.

## CLOUD ENVIRONMENT NOTIFICATION POLICY

### OUTAGES

In the event of an outage, current status and related updates will be provided on our [System Status](#) page. Response & restoral SLAs will align to the Premium Support definitions for the related incident priority level. You can receive email updates when there are unplanned outages. For more information, click [here](#).

## MAINTENANCE

For standard maintenance, notice will be given 2 calendar weeks prior to the maintenance date. Emergency maintenance situations may be performed with 48-hour notice.

Scheduled maintenance will also be reported on the [System Status](#) page. To receive email updates for maintenance events, click **Subscribe to updates** and select which products you use. For more information, click [here](#).

## 3RD PARTY IT SUPPORT POLICY

This policy is designed to provide seamless collaboration between Thomson Reuters Support professionals, our customer, and our customer's outsourced IT support team. The goal of the policy is to improve the overall support experience for our customer, independent of their choice of IT support solutions. This is accomplished by:

- Building long term relationships with our customer's outsourced IT providers.
- Helping our customer and our customer's outsourced IT provider invest in their own skill sets and acquire the training and knowledge necessary to effectively manage and support the Solution.
- Minimizing "finger pointing" during collaborative troubleshooting sessions involving Thomson Reuters Support Professionals, our customer, and our customer's outsourced 3rd Party IT support team.
- Sharing best practices for successfully using an outsourced IT provider to manage your Solution.

Thomson Reuters recommends the following practices for a successful support arrangement.

### 1. Maintain Continuity of Incident Ownership

One individual from the outsourced IT provider service should work to resolve the incident from start to finish avoiding delays in resolution time.

Thomson Reuters recommends working with your outsourced IT provider to implement a process that preserves continuity, during the process of working an incident.

### 2. Get Certified and Trained

Remain current on software training and certification.

Thomson Reuters recommends working with your outsourced IT provider to ensure that the individuals in your resource pool working on your account are trained and certified.

### 3. Stay Involved

For more complicated support issues, a customer representative (from either business or IT) should be involved in the incident resolution process to prevent misunderstandings that can delay incident resolution.

## SUPPORT INCIDENT PRIORITY LEVELS AND RESPONSE/RESTORAL SLAS

PRIORITY	DEFINITION	INITIAL RESPONSE SLA	RESTORAL TIME SLA	RESOLUTION COMMITMENT
P1 – Critical – Level I	Production system is inoperative and business operations are critically impacted. No work can be done.	Premium 1 hour  Standard 1 business hours	Premium 24 hours  Standard 2 business days	Develop suitable workaround or other temporary correction to restore operation. Apply permanent fix to next scheduled release. Software updates may be required. Customer must assign an authorized contact to partner with Support in resolving the issue. Both parties must be available during standard business hours.
P2 – High – Level II	Production system is adversely affected or is inoperative. Productivity is compromised; work can be done but is severely limited.	Premium 4 hours  Standard 4 business hours	Premium 60 hours  Standard 5 business days	Develop suitable workaround or other temporary correction to restore operation. Apply permanent fix to next scheduled release. Software updates may be required. Customer must assign an authorized contact to partner with Support in resolving the issue.
P3 – Medium – Level III	Production or development system has encountered a non-critical problem or defect and/or questions have arisen about product use. Programs are usable but non-critical features may not function.	1 business day	N/A	Develop suitable workaround or other temporary correction to restore operation. Apply permanent fix to next scheduled release. Software updates may be required.
P4 – Low – Level IV	Minimal system impact; includes feature requests and other non-critical problems. May also be a new feature request.	7 business days	N/A	Develop suitable workaround or other temporary correction to restore operation. Apply permanent fix to next scheduled release. Software updates may be required. Enhancement requests will be submitted to Thomson Reuters Product Management for consideration in future scheduled releases.

## SUPPORTED ENVIRONMENTS

Refer to the product documentation for hardware and software requirements related to installation, end of service notices, release notes, and supported platform guides accompanying specific products. Customer environments must follow these requirements and utilize the software properly in accordance with the applicable user documentation to qualify for coverage under support SLAs.

## PRODUCT RELEASES

Thomson Reuters Support works hard to continuously enhance and improve our products. We provide new product releases in the form of product updates. Consistent with our licensing agreements and industry standards, as new products are released, older versions of the product and associated platforms are formally no longer supported.

## WHAT IS NOT COVERED BY THIS GUIDE - SUPPORT

The following areas are not covered by the SLAs, support resources, policies and procedures described in this technical support guide.

### 1. Custom Integrations and Other Custom Code

Custom integrations and custom code may be developed as part of your Thomson Reuters software project. These may be built by you (the customer), by a 3rd party consulting firm, or by Thomson Reuters Professional Services. For further information about support and maintenance plans to cover custom integrations and custom code developed by Thomson Reuters please contact Customer Support.

### 2. Customer On-Premise IT Infrastructure

Thomson Reuters Support will help you troubleshoot complex, multi-layer problems where issues are contained simultaneously in our software and the customer on premise IT infrastructure. In cases where the root cause has been determined to lie in the IT infrastructure, we may recommend an environment review with Thomson Reuters Professional Services, or a 3rd party IT consulting company.



**THOMSON REUTERS®**