

THOMSON ONE WEALTH MANAGEMENT

ESCALATION PROCEDURES

The Thomson Reuters Helpdesk is the first point of contact for all customer queries concerning connection problems, advice on product functionality or content, and for data validation issues.

The Helpdesk service is offered via telephone or e-mail. Please note that the latter method should only be used for non-urgent queries. These issues are typically pre-fixed by "Is it possible to..." as opposed to "We need to..." Any issue that is having a business impact on your firm should be called into the respective specialists.

For assistance on Thomson ONE Wealth Management, the phone number to call is 1-888-463-3383. This will provide options for accessing specialist teams.

- Option 1-5 – available Mon-Fri 5am-Midnight EST, and Sunday 12pm-Midnight EST
- E-mail: thomsonadvisorsupport@thomson.com

Please use the attached e-mail template when submitting an e-mail query to any of our support teams.

Notification

All queries concerning connection problems, advice on product functionality or content, and for data validation issues, should be raised via the Thomson Reuters Helpdesk by telephone, or alternatively e-mail.

Call and E-Mail Logging

Our Helpdesk will log the query and provide a unique reference number for the purpose of query tracking. To assist this process the user should be prepared to give their full name and telephone number, company name and address, plus their product information.

Triage

Once our Helpdesk has ascertained the nature of the query, then they will categorize the query and assign a severity level, or priority code.

First Level Diagnostics

Our Helpdesk will attempt to resolve the query by using their knowledge and expertise. They will also use internal knowledge databases and follow diagnostic scripts. If the Helpdesk is required to perform off-line work to resolve the query, then they will communicate what action they will take and indicate an expected resolution time.

Assignment to Second Level Support

If our Helpdesk is unable to resolve a query they will seek assistance from the appropriate internal Second Level Support team (SLS).

Second Level Diagnostics

SLS will use their specialized expertise and, if necessary, work with other specialized areas in order to resolve the query. During this phase they may contact the user directly to perform additional diagnostics.

Resolution

Our Helpdesk will retain ownership of the query until resolution and will confirm satisfaction before closing the call ticket.



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