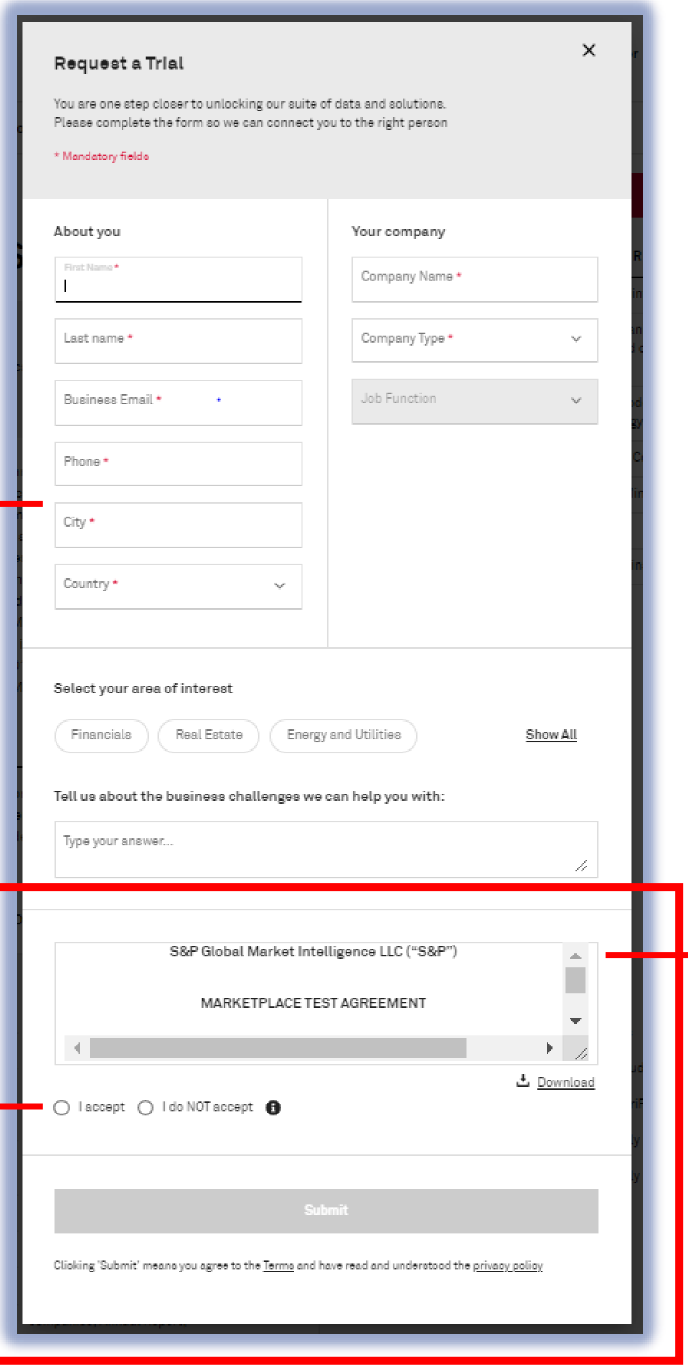
Click Thru Test Agreements

S&P Global
Market Intelligence

Overview

Goal: To accelerate and lower administrative burden for TEST agreements for commercial and clients for feed trials



Pre-populated for signed in users

"I accept" or "I do NOT accept" radio button. Client must choose one before being able to submit.

Test agreement which can be downloaded via link on screen

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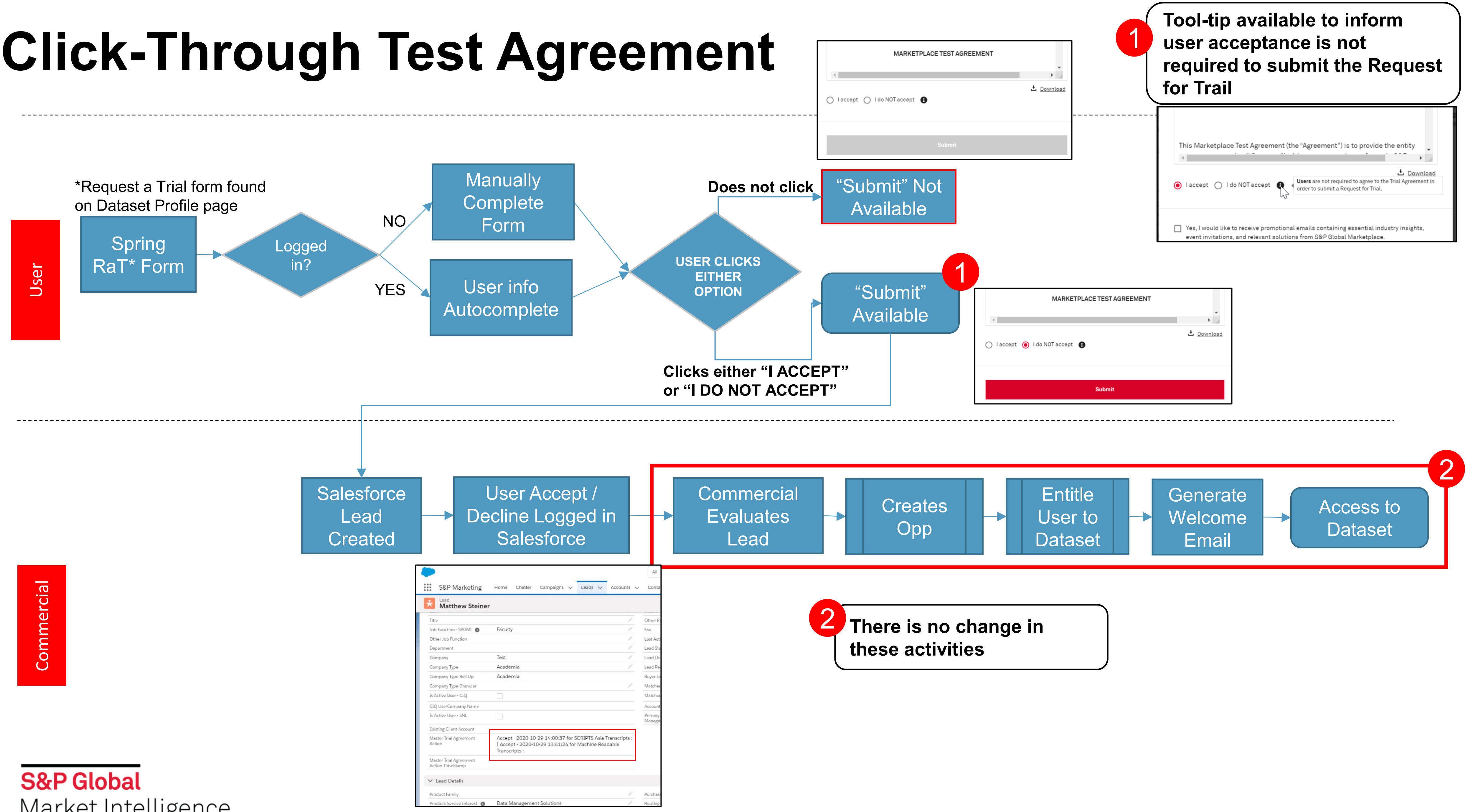
Click-Through Test Agreement



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FAQ

- **Do clients have to accept the Test Agreement to submit a Request for Trial?**
  - No, users have the ability to either accept or decline the Test Agreement.
- **How can clients accept/decline the Test Agreement on Marketplace?**
  - Clients can electronically accept/decline the Test agreement from the 'Request a Trial' form for applicable datasets.
- **What if someone clicks "Accept" but doesn't have authority to authorize a trial for my client?**
  - Agreements are non-binding until a commercial representative has discussed the need with the client and S&P Global fulfills the order accordingly.
- **Is click through Test Agreement allowed for all datasets?**
  - No, the click through Test Agreement is only applicable for certain datasets that allow trials. Notable exceptions include Platts datasets. If you do not see the Test Agreement box on that related dataset then this agreement may not be applicable for that dataset. Please consult the PM when in doubt.
- **How do clients get a copy of the agreement on Marketplace?**
  - Clients can download a copy of the agreement directly from the 'Request a Trial' form or from the FAQ section under Support in the top navigation bar.
- **What happens after the client clicks "Accept" and submits the trial form?**
  - The record is logged within the contact information of the lead. The commercial rep will receive the lead with that information and engages with the client to understand the needs. If the lead is qualified, rep will follow the CURRENT PROCESS to turn lead into opportunity and process the trial.
- **What happens after the client clicks "I do NOT Accept" and submits the trial form?**
  - The record is logged within the contact information of the lead. The commercial representative will receive the lead with that information and will engage with the client to understand their needs. If the lead is qualified, the sales rep will have to email the Test Agreement PDF and receive countersigned copy. Once the paperwork is completed, he/she will follow the current process to turn lead into opportunity and process the trial.
- **What happens if a client clicks "I do not ACCEPT" after clicking "ACCEPT" during an earlier trial request submit?**
  - No trial is processed until a commercial representative speaks to the client and determines the clients intent.
- **If a client submits a trial form from one dataset, is the trial only applicable to that dataset?**
  - Trials can be for multiple datasets, even if the client has electronically accepted the agreement for one dataset. The commercial representative is responsible for engaging with the client and understand their needs. The standard trial is for 60 days from the initiation. Sales representatives are responsible for ensuring trial ends in an appropriate timeline as done in current process.
- **When does the trial agreement expire for the client?**
  - The standard contract expires 60 days after the client has been fulfilled with trial credentials. *Standard times may differ by product.*
- **How can I extend trials?**
  - Similar to the current process, you need Sales Manager and/or Product Manager's approval to extend the trial for the client.
- **Is it required to always click "Accept" to trial any dataset?**
  - The client will eventually need to accept the test agreement to trial a dataset and this will speed up the process. If not, the commercial representative will follow the current process and send over trial paperwork via email.