

# Marketplace & Support Center

Access Workflows

# Primary Ways to Access S&P Global Marketplace

## Existing Clients

- Any client with existing login credentials for the following S&P Global platforms can self-register on Marketplace:
  - Capital IQ Pro
  - Ratings360
  - Platts Dimensions Pro
- Upon first login, these users will be placed into a Salesforce campaign

## Whitespace Clients

- Whitespace users can access the platform two ways:
  - Completing the New User Sign Up process on Marketplace
  - Salesperson can submit a Free Trial Quote

**Marketplace Storefront Trial Product Code:**

MI.STRFRNT.O\_1

**S&P Global**

Market Intelligence

## New User Sign Up Process

### Greenfield Client Account

- Users who have never logged into an S&P Platform, but whose email domain is part of a known **Key Online Account (KOA - an existing client)** will be directed to self-register
- These users will be placed into a Salesforce campaign and commercial will receive a lead

### Whitespace/Prospect Account

- Whitespace users that try to register via the New User Sign Up:
  1. Access to Marketplace request sent to MI Enablement and get fulfilled within 24 hours
  2. Upon fulfillment, users are invited to set a Marketplace password via email, giving them access to otherwise locked content
  3. User are placed in a Salesforce campaign and commercial will receive a lead

## Request More Information

- Any users (whitespace or greenfield) that submit a 'Request More Information' form will be routed to the correct salesperson based on Region and Company Type and placed into a Salesforce campaign
- These are passed as 'A Leads' to commercial

If you run into any challenges or have any questions, please email to **Marketplace Support** at [marketplacesupport@spglobal.com](mailto:marketplacesupport@spglobal.com).

# Marketplace Access – Automatic Self-Registration

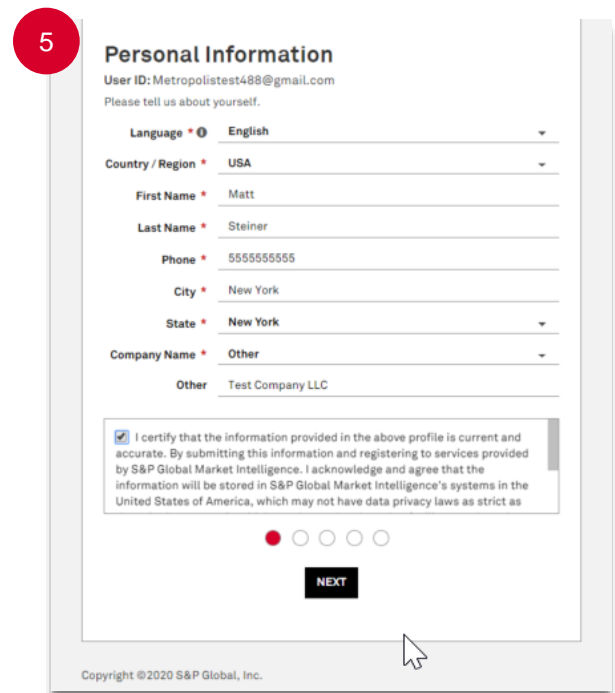
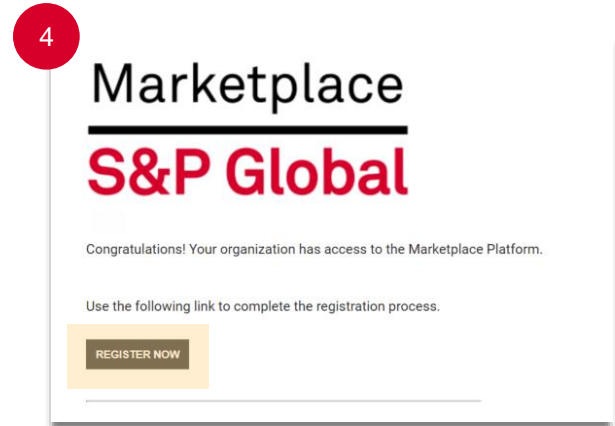
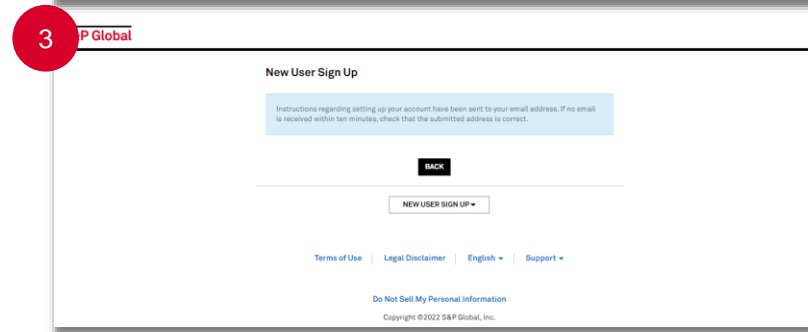
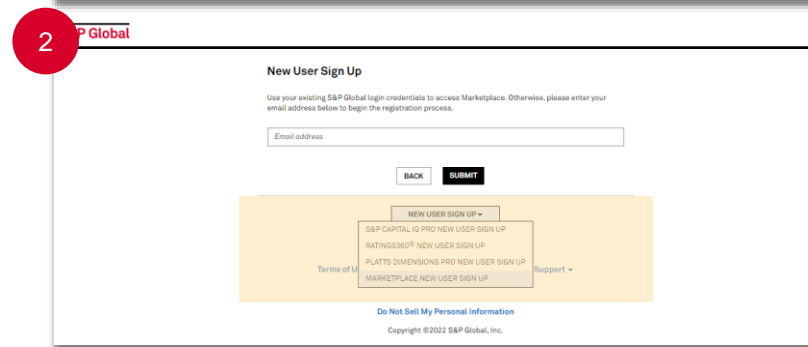
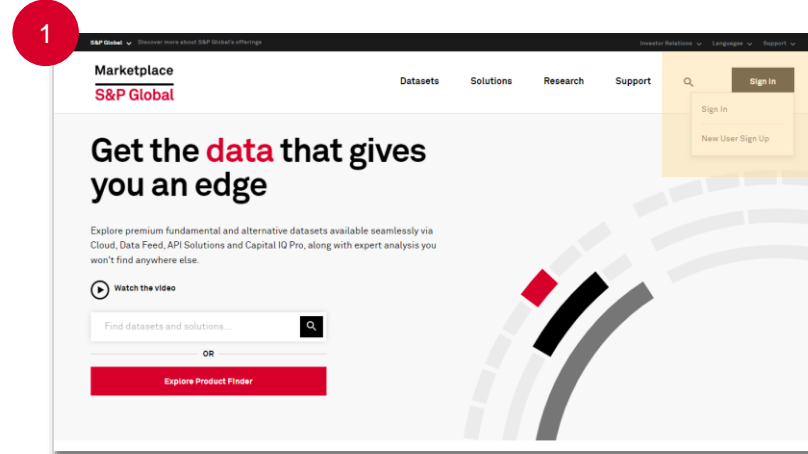
## Applicable to:

- Clients with access to other S&P Global Platforms (i.e., Capital IQ Pro, Ratings360, Platts Dimensions Pro)
- New users with email domains associated with an existing KOA

## Procedure:

1. User navigates to Marketplace and selects “New User Sign Up”
2. User is directed to provide an email address and expand the dropdown menu to select “Marketplace New User Sign Up”, then submit
3. User receives email indicating their company has access and is prompted to “Register Now” through the self-registration workflow
4. Once self-registration is complete, user will be directed to Marketplace and login
  - First time login generates the product code on their account

**Example:** John Smith works at Deloitte but doesn't have access to any S&P Platforms. Since their email domain is @deloitte.com, they can self-register.



# Marketplace Access – Authenticated Self-Registration

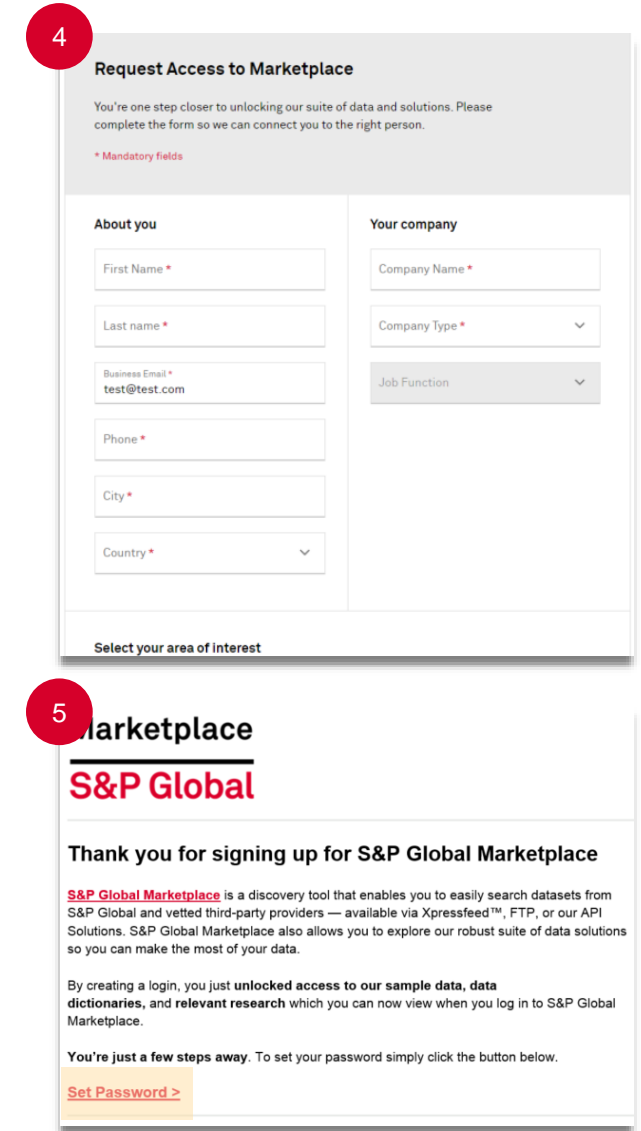
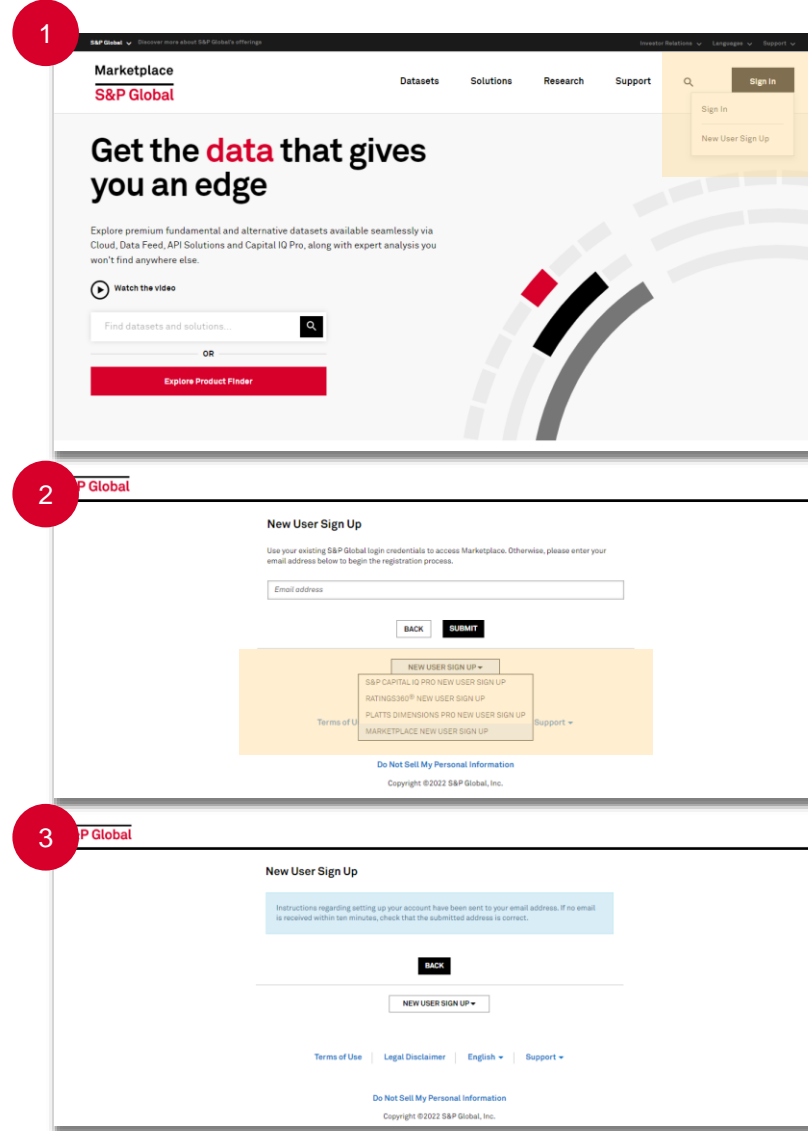
## Applicable to:

- Whitespace users

## Procedure:

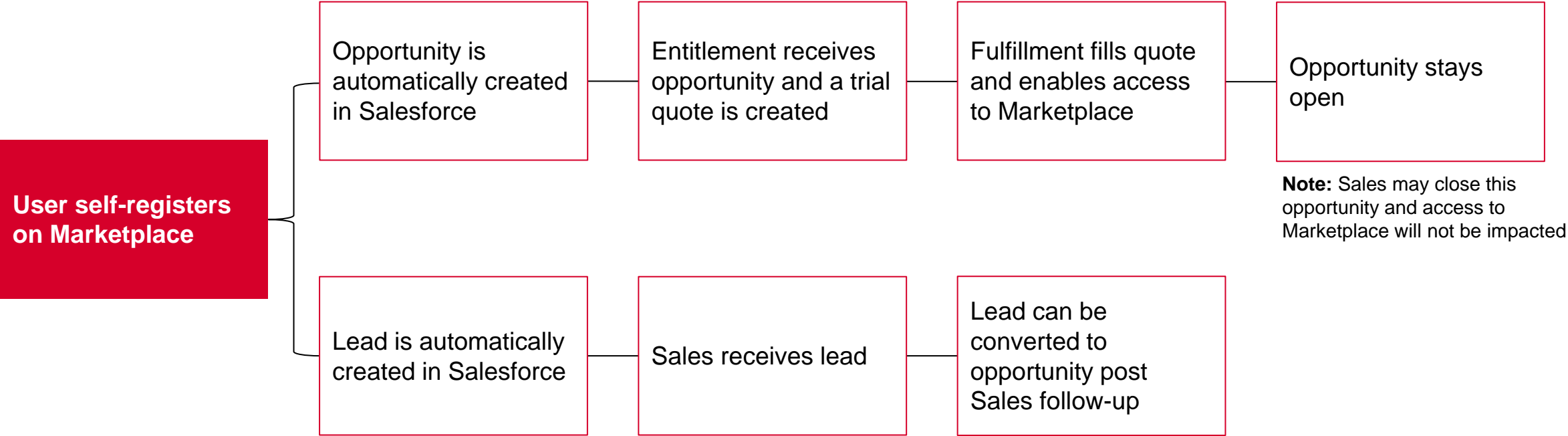
1. User navigates to Marketplace and selects “New User Sign Up”
2. User is directed to provide an email address and expand the dropdown menu to select “Marketplace New User Sign Up”, then submit
3. S&P authentication system will immediately recognize they are not associated with an account (KOA) and direct them to the Request Access form
4. Upon submitting the form, a lead is generated in Salesforce
5. MI Enablement automatically submits a Free Trial Quote to Fulfillment
6. Fulfillment team completes within 24 hours
7. User receives welcome email is prompted to “Set Password”

**Note:** Blacklisted email domains (e.g., @gmail.com, @factset.com, etc.) will not be able to self-register.



# What happens when a user self-registers on Marketplace?

When a user self-registers, two workflows occur in parallel to (1) enable access to Marketplace and (2) create a Lead for Sales to follow-up on



# Marketplace – Request More Information

## Applicable to:

- Any users that completes the “Request More Information” form from the button on a tile

## Procedure:

- User completes the Request More Information form
- A lead is created in Salesforce and routed to salesperson based upon region and company type – leads are passed as 'A' leads
- The lead includes the name of the Dataset / Solution the user was viewing when they submitted the 'Request More Information' form
- Salesperson to work lead same way as any other inbound; SLA to follow-up with the lead within two business days

The user can still gain access to Marketplace through any of the previously outlined scenarios detailed on the slides above

The screenshot displays the S&P Global Marketplace website. A red circle with the number '1' is positioned over the 'Request More Information' button on the 'S&P Capital IQ Fundamentals' tile. A second red circle with the number '2' is positioned over the 'Request More Information' form overlay, which is open on the right side of the screen. The form contains fields for 'About you' (First Name, Last Name, Business Email, Phone, City, Country, State) and 'Your company' (Company Name, Company Type, Job Function). Below the form, there are radio buttons for 'Select your area of interest' (Financials, Real Estate, Energy and Utilities) and a 'Show All' link.

# Marketplace – Request This Visualization

## Applicable to:

- Any users that completes the “Request This Visualization” form from the button on tiles featuring visualizations

## Procedure:

- User completes the Request This Visualization form
- A lead is created in Salesforce and routed to salesperson based upon region and company type – leads are passed as 'A' leads
- The lead includes the name of the Dataset / Solution the user was viewing when they submitted the 'Request This Visualization' form
- Salesperson to work lead same way as any other inbound; SLA to follow-up with the lead within two business days

The user can still gain access to Marketplace through any of the previously outlined scenarios detailed on the slides above

The screenshot displays the S&P Global Marketplace interface. At the top, there are navigation tabs: Overview, Visualization (selected), Sample Data, Data Dictionary, and Related Datasets. A red circle with the number '1' is positioned above the 'Request This Visualization' button on the visualization tile. The tile itself is titled 'S&P Capital IQ Financials Showcase Visualization' and features a 'Beneish M-Score' chart. Below the chart, there are two sub-charts: 'Sector Distribution' and 'Year-Over-Year - Health Care'. A red circle with the number '2' is positioned above the 'Request This Visualization' form overlay. The form includes fields for 'First Name', 'Last Name', 'Business Email', 'Phone', 'City', 'Country', and 'State'. It also has a 'Your company' section with fields for 'Company Name', 'Company Type', and 'Job Function'. At the bottom of the form, there are radio buttons for 'Select what you are interested in' (Data and Workflow, Visualization, Data, Workflow and Visualization) and a section for 'Select your preferred business intelligence tool(s)' with buttons for 'Tableau' and 'PowerBI'.

# Marketplace – Support Center Access

## Applicable to:

- Any users has access to Marketplace:

## Procedure:

1. User is logged onto Marketplace
2. User navigates to “Marketplace - Support Center” via Marketplace “Support” dropdown menu
3. User is automatically signed into the Support Center via Single Sign-On

**Note:** Users may attempt to access the Support Center directly through the following link: <https://www.support.marketplace.spglobal.com/en/>; when prompted for sign-in credentials, direct users to use the same credentials used for Marketplace access

The image displays two screenshots of the S&P Global Marketplace website. The top screenshot, marked with a red circle '1', shows the 'Marketplace' page with the 'Support' dropdown menu open. The 'Marketplace - Support Center' option is highlighted in yellow. The bottom screenshot, marked with a red circle '2', shows the 'Marketplace Support' page. The page features a search bar, a 'Search' button, and a 'Quick Links' section with links for 'Datasets' and 'Technical Guides'.

