

Sierra Chart Purchase and License Information

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Delivery Policy

All services are delivered digitally and subject to refund policy.

How to Access Sierra Chart

- For access to Sierra Chart you need to have a Sierra Chart Account. And you need to have [downloaded and installed](#) Sierra Chart.

If you already have an account, [Login to Your Account](#) to activate a Service Package and make a payment if your account Usage Time is expired, or to manage your account.

- If you are a new user and do not have an account, then [Create an Account here](#).

When you create an account you will need to [activate your trial](#).

After this trial time is up, refer to the [Renewing Access](#) section.

- When your Usage Time ends there is nothing to cancel. To renew access, refer to the [Renewing Access](#) section.

Renewing Access

Overview

The Sierra Chart Service Packages which include the software and included data services are paid for in 1, 3, or 6 month increments depending upon what you choose.

You pay for Usage Time of Sierra Chart by [activating](#) on your account the particular [Service Package](#) you want. And then adding sufficient credit to the [Services Balance](#) to pay for the chosen Service Package.

Thereafter, you then need to add sufficient credit to the [Services Balance](#) to pay for renewals.

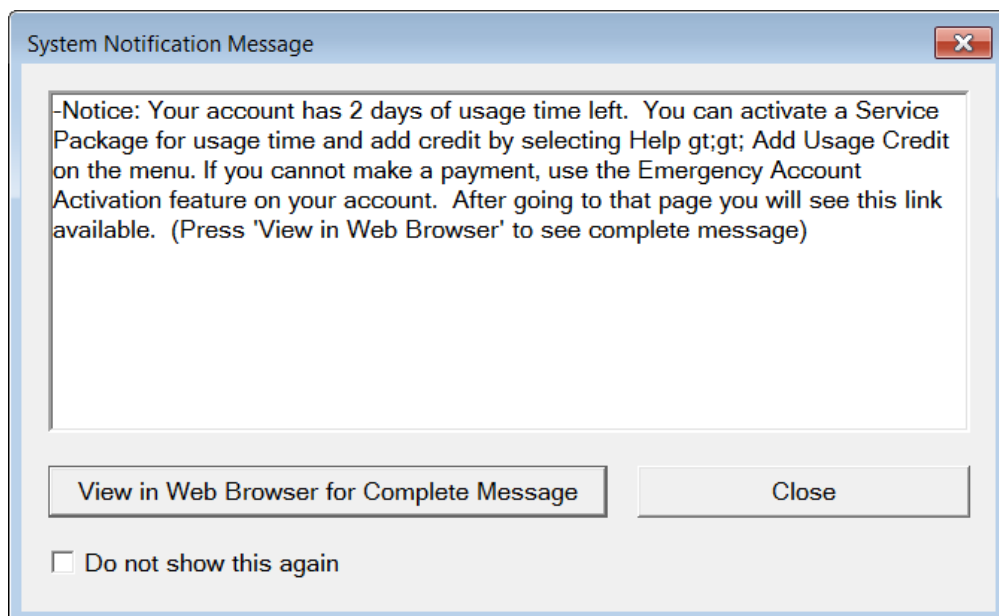
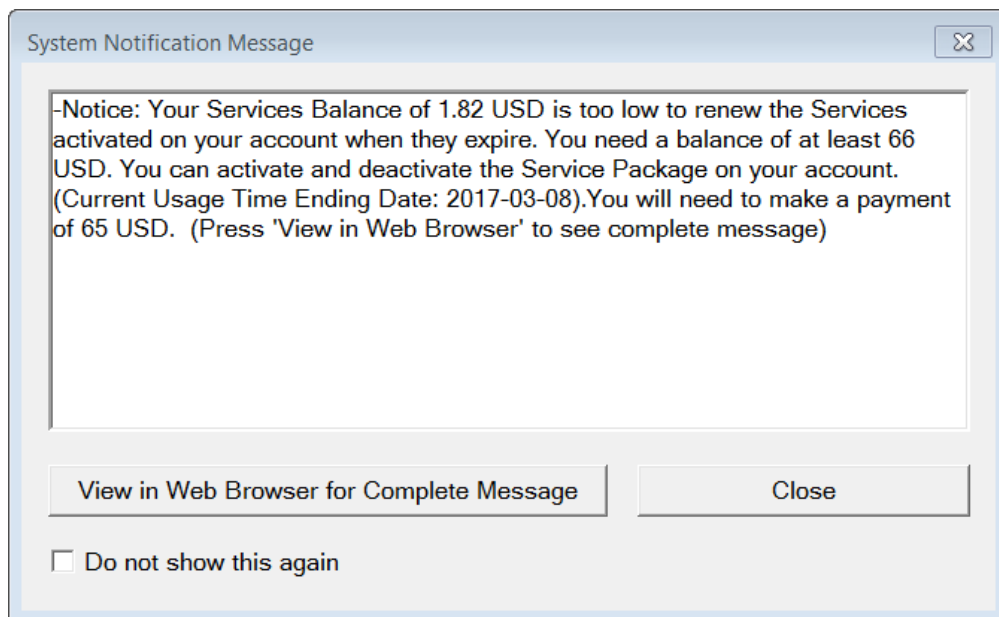
This is the basic model of billing.

Your account has an ending date for the **Service Package** that you have active and paid for on your account. Just before the ending date is about to expire, this ending date for your Sierra Chart Service Package is extended by 1, 3, or 6 months depending upon the Service Package time period activated, if there is sufficient credit on the **Services Balance**. The cost of the Service Package is deducted from the **Services Balance**.

It is recommended to keep a sufficient Balance on the **Services Balance** for at least several months of Usage Time depending upon what you require.

The Sierra Chart software will notify you approximately 4 days before the current ending date of the Usage Time to remind you to activate a Service Package for renewal if this has not already been done, or to add additional credit your **Services Balance** to renew your current Service Package if there is an insufficient Balance for renewal.

This notification is through the System Notification window which appears when starting Sierra Chart when there is a message to be viewed, or automatically appears when a message becomes available on your account. You will also get an email message if your Services Balance is too low. Refer to the images below.



To find your Service Package Usage Time ending date, select **Help >> Account Control Panel** on the Sierra Chart menu. The **Current Usage Time Ending Date** will be displayed on your Account Control Panel page.

The ending date will be automatically extended as long as a Service Package is active on your account and you have a sufficient Services Balance to pay for renewals. If there is an insufficient Services Balance on your account, the renewal will not happen until there is. Therefore, there is nothing to do when the Service Package Usage Time expires and there is an insufficient Services Balance to renew.

When the free trial Usage Time ends, follow the **Instructions** below.

Instructions

[Video Instructions](#).

1. Go to the [Activate Services](#) page. You will see instructions along with the current Service Package and number of Months set for renewal on your account. You can also go to the **Activate Services** page by selecting **Help >> Add Usage Credit** from within Sierra Chart.
2. Go to the [Available Services >> Choose Service Package and Time Period for Usage Time](#) section on that page. Refer to the image below.
3. Select the Service Package and number of **Months** from the list and press the **Update/Set** button. For a description of the available Service Packages, refer to [Description of Service Packages](#).
4. If you are changing from a trial to a paid Service Package you first need to add a minimum of 10 USD credit before you can activate the Service Package. To do this, go to the [Add Account Credit](#) page to make a payment to your Services Balance. Be sure to make a sufficient payment to cover the cost of the Service Package fully.
5. The Service Package for the number of Months selected will automatically renew so long as there is a sufficient Services Balance on your account. If there is not a sufficient Services Balance, the automatic renewal does not occur. There is normally not a need to use the **Renew Now** button on that form, if shown, since the renewal is automatic.

Choose Service Package and Time Period for Usage Time, or "Disabled":

3 - Standard - 26 USD / Month Update/Set

[Update and Renew Now](#)

Use **Update and Renew Now** to manually extend the usage time on your account for the number of selected months and Service Package and have the amount deducted from the Service Balance. However, there is not a need to do this because this will happen automatically on 2021-03-06.

Active Service: 3 - Standard - Active until: 2021-03-06 23:59:59 UTC

Description of [MBO](#).

6. In this image below, you can see that if you do not have enough credit on your Services Balance on your account, then you need to make a payment in order to pay for the activated Service Package which will then extend the Usage Time ending date by the selected time period (1, 3, or 6 months) for the current selected Service Package, if it is about to expire. To make a payment, click on the payment link.

Action Required:

- Your Services Balance of **0.00 USD** is too low to cover the Services activated on your account. You need a balance of at least **24 USD**.

You will need to make a [payment of 24 USD](#).

7. In this image below, you can see the form for [Add Account Credit](#) to make a payment to your Services Balance. There are various payment methods available. Use whichever one is appropriate for you.

Make a Payment. Account: TestAccount1

Account Name: TestAccount1
 Current Usage Time Ending Date: 2022-11-07 23:59:59 UTC 16 Days
 Current Service Package: Trial Package (Activated)
 Service Package Enabled For Renewal: 3 - Base Standard (Monthly) - 26 USD / Month [Change Package or Set Service Package For Renewal](#) (Package set on 2022-10-23)
 Services Surplus: 0.00 USD - [Make Payment](#)
 Affiliate ID: default

[Full List of Services to Renew](#) Use this link to refer to the activated services that the **Services Balance** pays for.

This page is for adding credit to your Services Balance. This balance is used for Sierra Chart Service Package Usage Time, Sierra Chart / Denali Exchange Data Feeds, exchange fees and other services. Go to the [Services Activation](#) page to activate services on your Sierra Chart account which would include a Service Package for usage time to use the software and related services.

Add enough credit to your account to pay for the activated services for the number of months in the foreseeable future that you require them. So you do not have to keep re-adding credit each month. If you require a refund of the credit, Sierra Chart will issue a refund minus a 5 USD refund processing fee.

Your Services Balance of **0.00 USD** is too low to renew the Services activated on your account when they expire. You need a balance of at least **26 USD**. To activate and deactivate services on your account, go to the [Services Activation](#) page. (Current Usage Time Ending Date: 2022-11-07).

Payment Form for Account: **TestAccount1**

Specify USD Amount: The minimum payment is 10 USD. In 1 USD increments.

Choose Payment Currency: If a currency other than USD is selected, the above USD amount will be converted to the equivalent amount in the selected currency when you click **Pay**.

Current Services Balance:	0.00 USD
Cost of Upcoming Services to be Renewed within 21 Days:	26 USD
Minimum Amount to Pay:	26 USD

Pay with **Stripe**

VISA AMERICAN EXPRESS MasterCard Maestro DISCOVER NOVUS JCB UnionPay 银联 Bank Transfer PayPal bitcoin

- You can deactivate the current Service Package at any time on the [Activate Services](#) page. However, there is normally not a need to do this because if there is insufficient credit on the Services Balance a renewal will not automatically happen.

Automatic Renewals

Usage Time at a particular [Service Package](#) which allows you to use Sierra Chart, is added onto your Sierra Chart account in 1, 3, 6, 12 month increments at a time depending upon the number of months you selected on the [Activate Services](#) page. This occurs when Sierra Chart Usage Time is purchased.

One or two days before the Usage Time is about to expire, the Usage Time ending date on your account is extended by 1, 3, 6, 12 months and the payment for it is made from your Services Balance on your Sierra Chart account if there is a sufficient Balance.

So if you have 200 USD on your Services Balance and your cost of a particular Service Package is 40 USD per month, then this is enough to pay for 5 months and your account will automatically renew for 5 months, at the selected time interval, if the Service Package is set for renewal on your account.

This has the advantage that you can suspend your account at any time and just keep the Balance as a reserve for future use.

When a [Service Package](#) for Usage Time is set for [renewal on your account](#) and when that Usage Time is about to expire, if there is an insufficient Balance on the Services Balance to pay

for the selected Service Package and the Number of Months, it will not be extended. So even if there is enough of a Services Balance to pay for Usage Time at a 1 month interval but you have chosen to purchase a higher number of months at a time, there will be no automatic renewal if there is not enough funds to pay for the number of months you selected.

There is also no automatic billing of a credit or debit card. As soon as you manually make a payment, the Usage Time will be extended at that time.

Therefore, it is not necessary to cancel services or do anything if you do not want to renew Usage Time on your Sierra Chart account, and your Services Balance is insufficient to pay for the Usage Time at the Service Package and number of months chosen.

Additionally, other services like Additional Systems and the [Denali Exchange Data Feed](#) will also not renew if there is an insufficient Balance.

Unlike Sierra Chart Usage Time, when you [make a payment](#), the **Denali Exchange Data Feed / Sierra Chart Exchange Data Feed** will not automatically renew if there was insufficient Balance previously because it is automatically canceled and will not renew the following month. You will need to go to the [Recurring Services](#) page to reactivate these services.

Free Mode

When your Sierra Chart paid Usage Time ends, Sierra Chart is placed into Free Mode. It will not be able to connect to any external Data or Trading service in this mode. Some features of the program will be restricted like Advanced features. You are still able to open charts and view your existing chart data.

Studies and Drawing Tools and other features can still be used and you can do custom study development.

Sierra Chart will also be placed into Free Mode, when an update of an older Sierra Chart version becomes mandatory. In this case, when you start Sierra Chart, the

Help >> Download Current Version command will automatically be triggered.

Lost Password

- If you lost your Sierra Chart software password, use the [Account Password Reset](#) page to go through the process to reset and retrieve your Account Name and Password.

Licensing / Number of Systems

- Each user should have a separate Sierra Chart account.
- You can install Sierra Chart on as many computer systems as you want. For instructions, refer to the [Software Download](#) page.

You will need to login into those additional copies with your Sierra Chart Account Name and Password. However, each Sierra Chart account can by default be used on 2 computer systems at the same time or concurrently unless you pay for additional

systems (see below).

- You may not be able to connect to an external Data or Trading service more than once at the same time using the same external service username. That is a restriction imposed by external services and not Sierra Chart. A solution to this is to use the [DTC Server](#). However, to access market data from the main server instance of Sierra Chart in another installation of Sierra Chart, these other installations of Sierra Chart can only be used on the same computer system.
- If you are using the **Denali Exchange Data Feed**, then to access that real-time data on two computer systems at the same time, then refer to [Denali Exchange Data Feed Connections](#). Due to exchange rules, market data can only be accessed on one computer system at a time. This is a requirement of exchanges. Not Sierra Chart.
- You can install Sierra Chart multiple times (no restrictions on the number of installations/copies) on the same computer system and each of those copies can be used concurrently without restriction. For instructions, refer to [Multiple Services](#) or [Using DTC Server for Data and Trading in Another Sierra Chart Instance](#).

You can have many tens of copies of Sierra Chart on the same system running at the same time with a single license.

- An installation of Sierra Chart is not linked in any way to a particular computer system. You can freely install Sierra Chart on any system or move it to any system you want. You just need to login to Sierra Chart using your Account Name and Password. There is only a limit to the number of simultaneous running instances of Sierra Chart on different systems unless you pay for more systems (see below).
- If you wish to use Sierra Chart on more than 2 computer systems at the same time, you will need to pay for additional systems through the [Activate Services](#) page. A maximum of 3 is allowed. For more you need a separate Sierra Chart account.
- A Sierra Chart client is entering into an agreement with Teton IT Management Services.

Support Services

Users who pay for Sierra Chart directly to Sierra Chart may have entitlement to a reasonable amount of support to assist you with connections to external services and guidance for the most basic use of the software and services. The definition of reasonable and basic use is defined by Sierra Chart support within the context of the support request. In general reasonable support would be not more than 10 minutes of support per month per user.

Support outside of what is described here is within the discretion of Sierra Chart Support. Telephone support is usually chargeable and an extra service. It may be provided at no charge if it is the most efficient way to resolve a basic issue you are having.

It is fully within the discretion of Sierra Chart engineering support as to whether support is provided at no cost or is billable. If you have a question or request, it is subject to being billed. We will advise you of this ahead of time.

Support which is not considered part of the service packages is billed at 65 USD per hour. You will be notified of this ahead of time. This charge applies to whether support is provided on the Support Board or through a remote assistance session.

Customers who do not have direct paid accounts do not have entitlement to support. This includes Sierra Chart accounts provided through a broker. Those are not entitled to support. Any support provided is subject to a cost of 65 USD per hour.

Invoices for Payments

To get an invoice for payment you have made for Sierra Chart Usage Time or other services, go to the [Transaction Log](#) page.

It is possible to add additional text to the customer information which by default includes the name and address. You may want to add a tax ID. To do that, set the "**Additional Invoice Text**" first through the [Manage Account Information](#) page.

Refunds

- To request a refund, make this request through an [Account Support Ticket](#). Refer to the information below for the specific refund terms and conditions.
- As a matter of policy any refund requests for either of the [Real-Time Exchange Data Feeds Available from Sierra Chart](#) or for exchange fees will not be made. You have been advised of this before confirming a payment for these services. These are a direct cost to us that we cannot obtain refunds for ourselves. There are some exceptions to this rule, in the case of a genuine mistake and if we can arrange a refund. But this is something that has to be determined case-by-case and there are service fees for this at 50 USD per hour.

Even in the event of a technical problem with the data feed, there is still not a basis for the refund unless the feed was totally inaccessible at all times for you. A momentary interruption with the data feed or a data error, which are exceptional conditions, are not the basis for a refund because these conditions at most would constitute an event which is .001% or less of the overall time the data feed is provided and of the overall data. The data feed is already provided at cost and at a very substantial discount. So there simply is no room whatsoever for a refund for a problem that constituted .001% or less of an otherwise reliable feed provided.

- A reason for a refund needs to be given. A refund for the remaining Services Balance or usage time on your account can be made according to the following terms.
- A minimum refund fee of 5 USD/EUR may be charged against any refund made.
- Refund requests for amounts less than 10 USD are not made.
- There may also be a deduction for support expenses at a rate of USD 50 per hour. Do understand that providing support to users whether online or via telephone does cost us money and is not refundable.
- For refund to be given, there must be a means by which a refund transaction can actually be made. It usually is not possible to refund the payment card directly after a certain amount of time has passed. Usually three months. In this case an alternative will be to receive the money through a PayPal account.
- Any refunds to a Bitcoin or other cryptocurrency address, will have the network fees

present at the time, deducted from the refund amount.

- Refunds through PayPal will have the PayPal fees deducted because we do not receive a refund of those from PayPal.

Privacy

To operate effectively and provide you with the best experience possible, Sierra Chart sometimes collects data and information from individuals who use our services or visit our website. We may collect information through the Sierra Chart website, via our Support Board, Account Support Ticket system, Email, or through your interaction with our products. Sierra Chart collects this data to provide you with the services you need and to continually work to improve our products. At the same time, Sierra Chart values your privacy. As a result, we have developed this Privacy Policy to explain how we collect, use, transfer, disclose, and store your information. Please review the details, and let us know if you have any questions.

What information does Sierra Chart collect?

Sierra Chart generally collects and uses two types of information from people who visit our website or access our services: personal information and non-personal information. Personal information is data that can be used to identify or contact a particular person. Non-personal information is information that, on its own, does not permit direct association with any particular person. Generally, there is no collection, storage, or processing of personal or non-personal information, except as described in this policy.

How does Sierra Chart use or share personal information?

When you interact with the Sierra Chart website, Sierra Chart services, or Sierra Chart Software, Sierra Chart may collect, use, and share some types of personal information. Specifically, if you register with our website, contact us, or purchase and use Sierra Chart products or services, we may collect a variety of information from you, including your name, address, phone number, email address, IP address, professional status, and Trading Account data. We may share your personal information with the following:

- Sierra Chart's employees, contractors, service providers, and other third parties we use to support our business.
- Brokers, futures commissions merchants (FCMs), or other clearing firms with whom you (expressly or impliedly) grant permission to share information. Other entities to fulfill the purpose for which you have specifically provided the information.
- For any other purpose disclosed by us when you provide the information.

(Note: When a payment is made for Sierra Chart, your name and address information you have set in your account details is provided to the payment processor and their bank, which you choose to use among the supported payment processors. Additionally, if you choose to use the Sierra Chart Exchange Data Feed or the Denali Data Feed, name and address information is provided to the data feed Vendor Of Record and to the exchanges as is required.)

Sierra Chart may also disclose your personal information:

- To enforce or apply our agreements with you, including for billing and collection purposes.
- If we believe disclosure is necessary or appropriate to protect our rights, property, or safety, our customers or others. This includes exchanging information with other companies and organizations for the purposes of fraud protection and credit risk reduction.
- Importantly: We do not have access to your credit/debit card number since this is processed by outside payment processors.

How does Sierra Chart use or share non-personal information?

Sierra Chart may also collect, use, and share some types of non-personal information. For example, Sierra Chart uses cookies on our website. A cookie is a piece of data stored on a hard drive containing information about the user. Usage of a cookie is in no way linked to any personal information while on our site. If you reject the cookie, you may still use our site. Similarly, Sierra Chart may use IP addresses to analyze trends, administer the site, and track movement on the website. Sometimes IP addresses are not linked to personal information, and in some cases they are.

Not all of our website and services respond to your browser's "do-not-track" signals or comparable mechanisms. Generally, however, we only collect non-personal information via the Sierra Chart website (except when forms are completed and submitted to Sierra Chart).

Can I opt out of information collection or request a correction to my information?

Yes. You may opt out of the collection of certain personal information by SC. You may also request access to and correct your personal information held by SC. We will make reasonable efforts to correct errors in personal information within thirty (30) days of receipt of a correction request. To request correction, opt out, or learn more about our personal information policies [START A TICKET](#).

What about links within the Sierra Chart website or products?

Our website contains links to other sites. Please be aware that Sierra Chart is not responsible for the privacy practices of other such sites, for example "3rd party software programmers that support the Sierra Chart Platform". As a result, we encourage you to be aware when you leave our site and to read the privacy statements of each and every website that collects personally identifiable information. Our privacy policy, as it relates to the Sierra Chart website, applies solely to information collected by this website.

What happens if Sierra Chart changes the Privacy Policy?

If we decide to change our privacy policy, we will post those changes, so you are always aware of what information we collect, how we use it, and under what circumstances, if any, we share it with others.

Is there anything else I should know?

It bears repeating that Sierra Chart does not have access to your credit/debit card number since this is processed by outside payment processors. Please know that if you share personal information with Sierra Chart, it may be transferred to any Sierra Chart facility. We recognize that many customers access Sierra Chart products and services from outside of the United States. Sierra Chart strives to

ensure User Privacy Sierra Chart respects the fundamental principles of privacy: notice, choice, access, security, data integrity and purpose limitation, and accountability. Sierra Chart incorporates these values into all aspects of our service, including ensuring the security and integrity of any information you share with us.

What if I still have questions?

Sierra Chart is always happy to answer any questions you have about our commitment to privacy and the security of your information. You can contact with any questions. [START A TICKET](#)

Effective Date: June 2018

1 "SC" means Sierra Chart, as well as its subsidiaries and affiliates.

Canceling

If you would like to cancel your Sierra Chart service, follow the instructions below.

1. Deactivate/disable the Service Package renewal on your account. This is done through the [Activate Services](#) page. The existing Usage Time will expire at its expiration date.
2. Deactivate the Sierra Chart Exchange Data Feed on your account if you are using that. This is done through the [Sierra Chart Exchange Data Feed Features](#) page.
3. Deactivate the Denali Exchange Data Feed on your account if you are using that. This is done through the [Denali Exchange Data Feed Features](#) page. Also refer to the [Canceling the Denali Exchange Data Feed](#) documentation.
4. There is not any automatic billing to your credit/debit card. So that is not anything with which to be concerned.
5. If you want a refund of your Services Balance, then start an [Account Support Ticket](#). First refer to the [Refund Policy](#).

Recurring Billing

Normally there is not automatic or recurring billing to a credit or debit card for Sierra Chart. All payments must be manually initiated by a user.

Recently, automatic payments through the Stripe payment processor has been added and can be used. To use this, go to the [Add Account Credit](#) page.

If you are not using the automatic payment option, you will pay for the services that you require ahead of time by making a payment to your [Services Balance](#).

In the case of your [Sierra Chart Service Package](#) and the [Denali Exchange Data Feed](#) if you are using it, the payment for these services is made automatically from the [Services Balance](#) on your account before the particular service expires.

Therefore, you generally want to make sure you have a sufficient credit on the Services Balance for your account to keep the services you require active.

Renewal Dates

Some Sierra Chart services renew on the particular date they expire which can be on any day in a calendar month. Other services renew according to the calendar month and therefore renew at the beginning of the month.

Sierra Chart Usage Time ([Service Packages](#)) renews when the existing usage time on your account expires. So this can be at any time in the month. You can see your Sierra Chart account usage time expiration date in the [Account Details](#) section on the main control panel page.

Exchange Fees renew exactly at the start of a calendar month according to the UTC time zone.

Therefore, these two costs/fees, are not always in sync with each other. Additionally Sierra Chart usage time is paid for in increments of 31 days or a multiple of 31 days.

Suspending Usage Time

To suspend [Sierra Chart Usage Time](#) renewals on your account, set the Service Package to renew to **Disabled** on the [Services Activation](#) page. The existing Usage Time on your account will remain, and will be used up normally.

If you anticipate wanting to suspend your Usage Time, it is recommended that you set the Service Package on your account to only one of the [1 Month](#) options rather than a longer time. This will renew month-to-month. You can do this on the [Services Activation](#) page.

Exclusive Agreements

Sierra Chart does not engage in any kind of exclusive agreements.

Below are some examples of this.

We will not enter into an exclusive agreement with a single reseller in a particular geographical area to offer Sierra Chart.

We will not enter into an agreement containing language which excludes us from later entering into any kind of an agreement relating to Sierra Chart with individual users, resellers or businesses, that the agreement says should be excluded.

We will not enter into an agreement exclusively offering functionality in Sierra Chart to one particular entity to the exclusion of anyone else. This excludes some custom development that was agreed ahead of time to be for that one particular entity, but in that particular case it would be developed as something completely separate and not part of Sierra Chart.

Some feature or functionality that is developed as part of Sierra Chart, is open to all even if we billed a specific entity extra for the development of that feature or functionality. Although in these cases what we normally bill is only a small portion of the actual cost to develop it.

Under no conditions, will an individual or business be cut off from the use of Sierra Chart other than for

reason of nonpayment. We understand that users take the time to learn about Sierra Chart, do custom development for Sierra Chart with their own time and money, and therefore can become dependent on our products and services for a certain period of time. It is for this reason, that we always endeavor to maintain consistency as much as we can, maintain reliability and longevity of our products and services.

There is no promise being made here that Sierra Chart will always be available, available at the same prices, and always work the same way but this generally is our objective.

The price of Sierra Chart can be increased but these price increases will be reasonable and provided with notice when possible.

None of the above statements constitute any legally binding agreement. They are only statements of intention.

Non-Disclosure Agreements

Sierra Chart does not sign nondisclosure agreements. If you are the provider of an API for your service, there should not be any nondisclosure agreement. You want to sell your service, and that service has a cost to it, so why should there be a nondisclosure agreement for the API? It makes no sense. To think there is something unique or special there, or something worth protecting is frivolous and lacks any merit and common sense.

If you want to tell us about something you would like to have added to Sierra Chart, then we are also not going to sign a nondisclosure agreement because this is functionality which is going to be part of Sierra Chart and available to our user base.

Additionally, there are a world of ideas. Anyone can come up with an idea, and your idea has already been thought of, or will be thought of at a later point in time independently and to think you have some kind of protection of that idea, and some claim against us, lacks any merit.

And we are the engineers. We are the ones who implement ideas. It is the implementation and execution of an idea which is the most difficult part. And it is through that process, that specific details about accomplishing it that have to be determined and implemented. This is the hard part and we do all of that work and those are our ideas.

*Last modified Monday, 05th June, 2023.