PARTNER CENTER CO-SELL CONNECTOR FOR SALESFORCE CRM

The current version of the solution is in beta state and available for guided deployment to a select set of partners. The Connectors solution would be available for all partners from July 2020 onwards

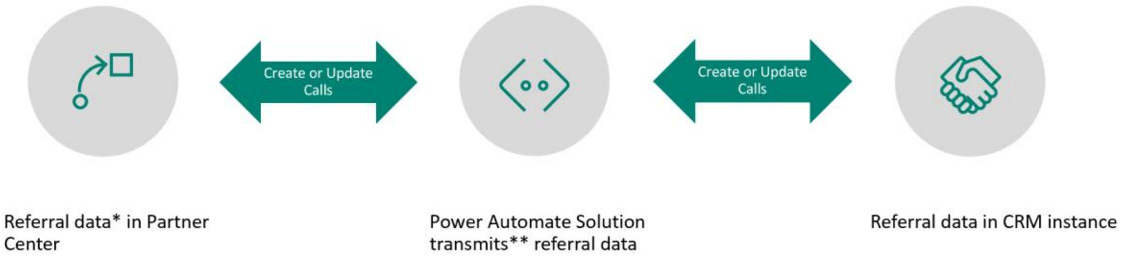
Contents

1. Intended audience

- Partners actively Co-selling with Microsoft sellers in Partner Center.
- Partners Co-selling with Microsoft sellers in Partner sales connect (PSC) and are working to migrate to Partner Center for Co-sell; and
- Partners in the above categories who have higher volume of co-sell deals and need a convenient way to create/manage these deals without having to manually upload/sync these deals using the Partner Center portal.

2. Partner Center Referrals Connector

Partner Center Co-Sell connector aims to bi-directionally synchronize Co-sell referrals between Partner Center and your CRM instance. The chief value proposition is that your sellers can work on their familiar CRM systems and manage Co-sell referrals coming from Microsoft Partner Center referral system to your CRM system.



*Data is inclusive of all Microsoft seller, storefront and marketing demand generate referrals

**Transmission permissions are set by your company

Using the Co-sell connectors, you will be able to create a new Co-sell referral to engage a Microsoft seller, receive referrals from the Microsoft seller, accept/decline referrals, modify deal data such as deal value, closing date etc. as well as receive any updates from the Microsoft sellers on these Co-sell deals. By adopting this solution, you will be able to work on the CRM of your choice and wouldn't need to explicitly visit Partner Center to manage your referrals. The solution is based on Microsoft Power Automate Solution and uses Microsoft Partner Center APIs.

3. Pre-requisite Readings

Prior to getting started with implementing Connectors on your Salesforce instance for referrals bi-directional synchronization, we advise you to read up from the below resources and familiarize yourself with these topics.

Topic	Details	Link
Microsoft Partner Center	Microsoft Partner Center is partner experience portal for different partner personas to perform different set of activities all the way from publishing offers to managing roles, consuming analytics, executing transactions, viewing and managing pay-outs, managing MPN program aspects such as benefits and	https://docs.microsoft.com/en-us/partner-center/

	competencies etc. It supports a wide variety of programs including CSP, MPN, Windows developer and Commercial ISVs programs.	
Referrals in Partner Center	Microsoft offers many resources to help you grow your partner business. You can use Partner Center to get qualified sales leads from different channels.	https://docs.microsoft.com/en-us/partner-center/referrals
Co-selling motion	As a Microsoft partner, you can choose to cooperatively sell and manage opportunities with Microsoft, so that you can expand value to customer, grow deal size, increase win rate, and/or accelerate time to close.	https://partner.microsoft.com/en-IN/membership/sell-with-microsoft
Power Automate Platform	Power Automate is a service that helps you create automated workflows between your favourite apps and services to synchronize files, get notifications, collect data and more.	https://docs.microsoft.com/en-us/power-automate/
Creating Microsoft Power Automate flows	You can easily create flows & orchestrate workflows using Power Automate platform.	https://docs.microsoft.com/en-us/power-automate/get-started-logic-flow

4. Pre-requisites & Relevant Information

Before you start with the installation process, please ensure that the following pre-requisites are met:

Topics	Details	Links
MPN ID	As a Microsoft partner, you must have a valid MPN ID that would enable you to have business relationship with Microsoft.	https://partner.microsoft.com/en-IN/
Co-sell readiness	Your IP/Services co-sell solution must be co-selling ready.	https://partner.microsoft.com/en-IN/membership/sell-with-microsoft
Partner Center account	You must have an active Partner Center account. The MPN ID associated with the partner Center tenant must be same as the MPN ID associated with your Co-sell solution. Please verify that you can see your Co-sell referrals in Partner Center portal prior to deploying the Connectors.	https://docs.microsoft.com/en-us/partner-center/
Partner Center user roles	The Partner Center user account for referral synchronization must have “Referral admin”	https://docs.microsoft.com/en-us/partner-center/create-user-

	role to access referrals data viz. "Referral admin" on Partner Center tenant.	accounts-and-set-permissions
Salesforce CRM	The CRM user account should have "System Administrator" or "System Customizer" role on the CRM instance.	https://help.salesforce.com/articleView?id=basics_understanding_administrator.htm&type=5
Power Automate Flow Account	An active http://flow.microsoft.com account for the CRM "System Administrator" or "System Customizer". Ensure that the flow account user logs into http://flow.microsoft.com at least once beforehand.	https://docs.microsoft.com/en-us/power-automate/sign-up-sign-in
Creating sections in Salesforce environment	Form creation to add custom fields for bi-directional referral creation.	Create Separate Section in Salesforce CRM Opportunity Layout

5. Best Practices: Test Before You Go Live

Prior to installing, configuring, and customizing the Power Automate solution on the production environment, it's best to follow the below guidelines to avoid any disruption on the production instance

- Install Microsoft Power Automate solution on staging environment/CRM instance.
- Make a copy of the solution and perform your configuration & Power Automate flow customizations on the staging environment.
- Test the solution on staging/CRM instance.
- On success, import as managed solution to the production instance.

Following is a description of the high-level steps that are required:

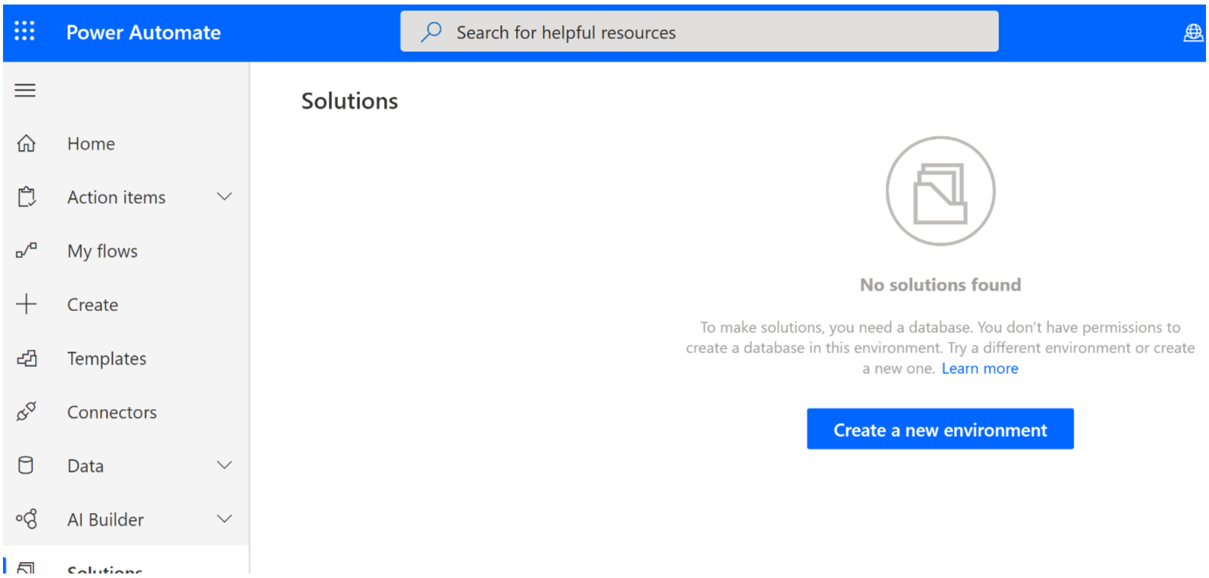
High Level Steps	Description	Time to Complete (in minutes)	Roles Required
Installation of "Partner Center Referrals Synchronization for Salesforce" solution into your CRM instance	You would need to download Partner Center Referrals Synchronization for Salesforce solution from Microsoft AppSource and install in your Microsoft Power Automate Flow account for your CRM environment. ***Note: The installer shows "Dynamics 365" as the type of soln. is "dynamics flow". The publishers don't need Dynamics365 subscription/instance.***	30	Your Salesforce System Administrator/ System Customizer

Configuration of “Partner Center Referrals Synchronization for Salesforce” solution	The solution consists of Power Automate flows. You would need to associate connections (users with appropriate roles) to the Power Automate flows and explicitly “Turn on” the Power Automate flows. You would also need to configure a flow to listen to create and update changes on either Microsoft Partner Center or Salesforce end.	30	Your Salesforce System Administrator/ System Customizer For Partner Center sign-in, user with Referral Admin roles
Customization of “Partner Center Referrals Synchronization for Salesforce” solution	Since Salesforce CRM systems are highly customizable, partners can choose to customize the Power Automate flows for some of their CRM fields based on the Field Mapping Guide.	60* *Optional Step **per customization	Your Salesforce System Administrator/ System Customizer
End-2-End synchronization of referrals between Microsoft Partner Center and partner’s Salesforce CRM	Once the solution is installed, configured, and customized, you can test bi-directional synchronization of referrals between Microsoft Partner Center and CRM system.	60	Partner Center user account for a Referrals admin in the Partner Center tenant

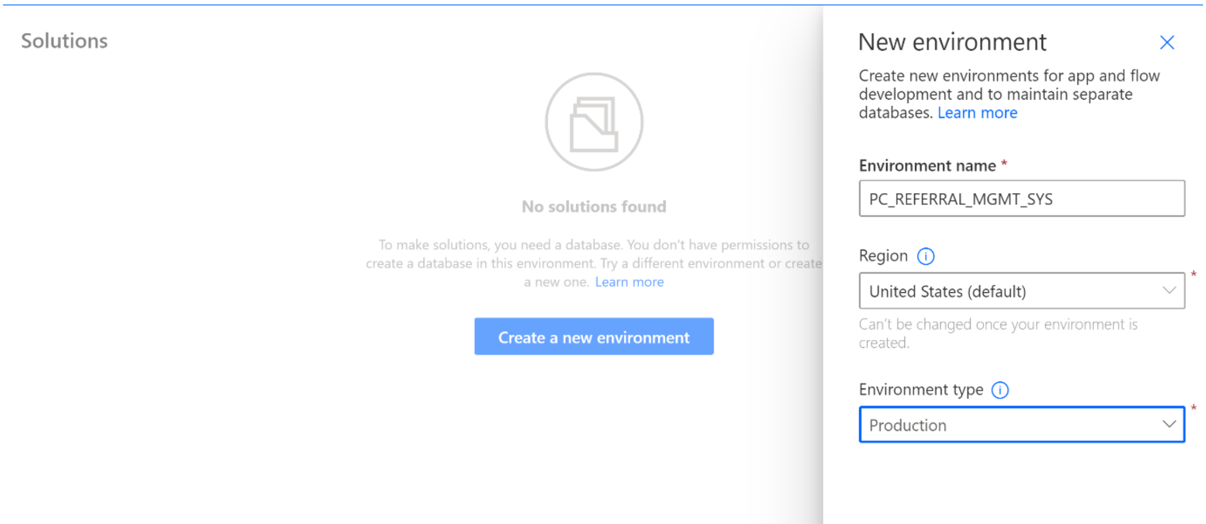
Detailed steps on installation, configuration & customization follow in the below sections.

6. Partner Center Referrals Connectors for Salesforce (Power Automate Solution) Installation Steps

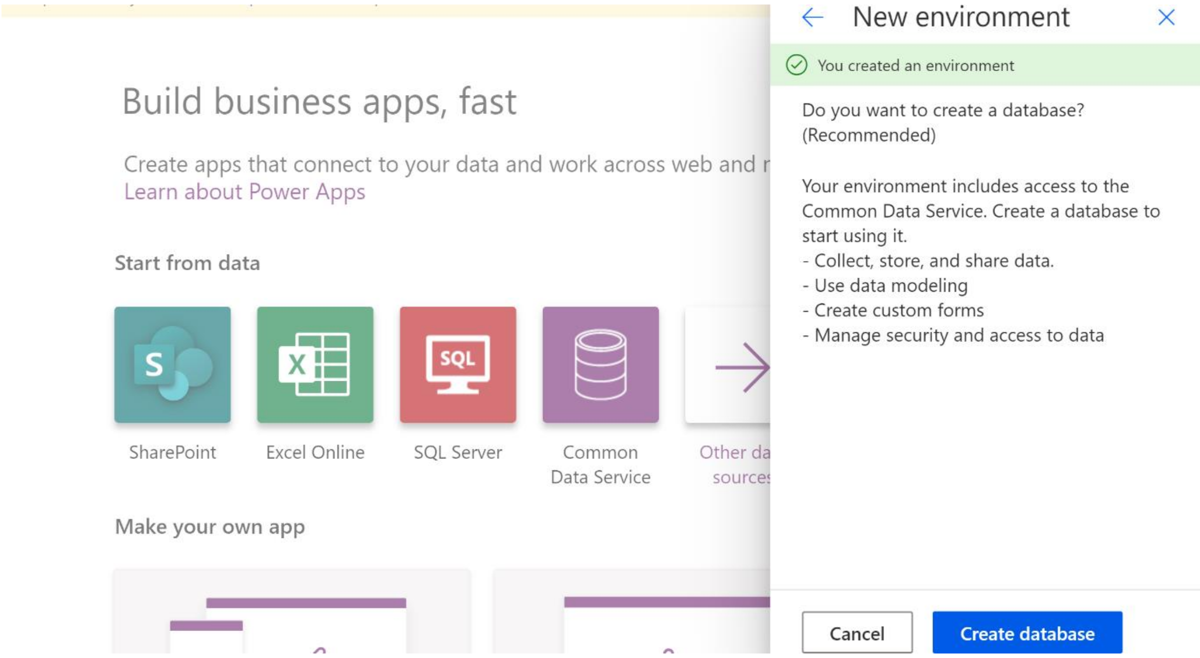
1. Navigate to http://flow.microsoft.com to create the environment on which the Power Automate solution would be installed.
2. Once you log in to your flow account, from the left navigation bar, select “Solutions”



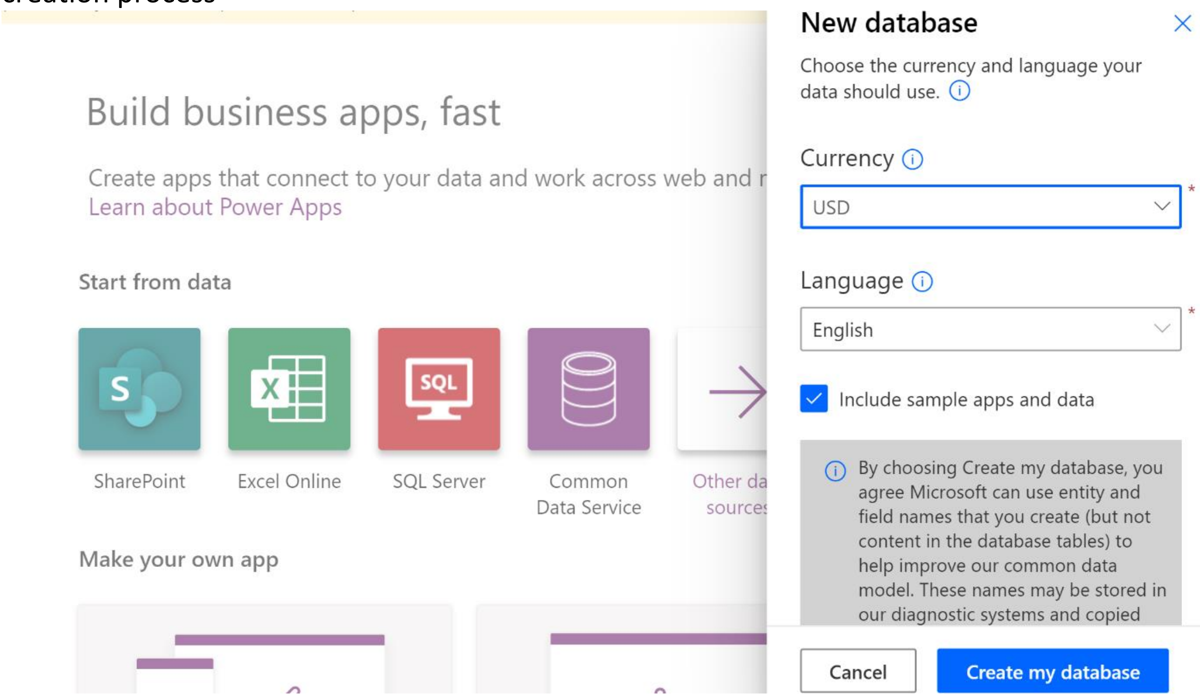
3. Create a new environment on which the Power Automate solution would be installed



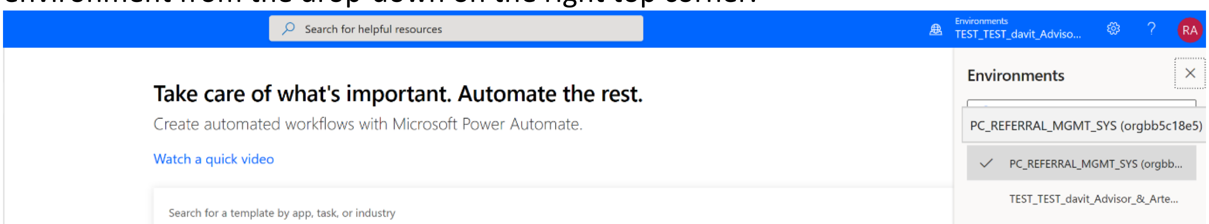
4. As part of creating the environment, you would also need to create a database



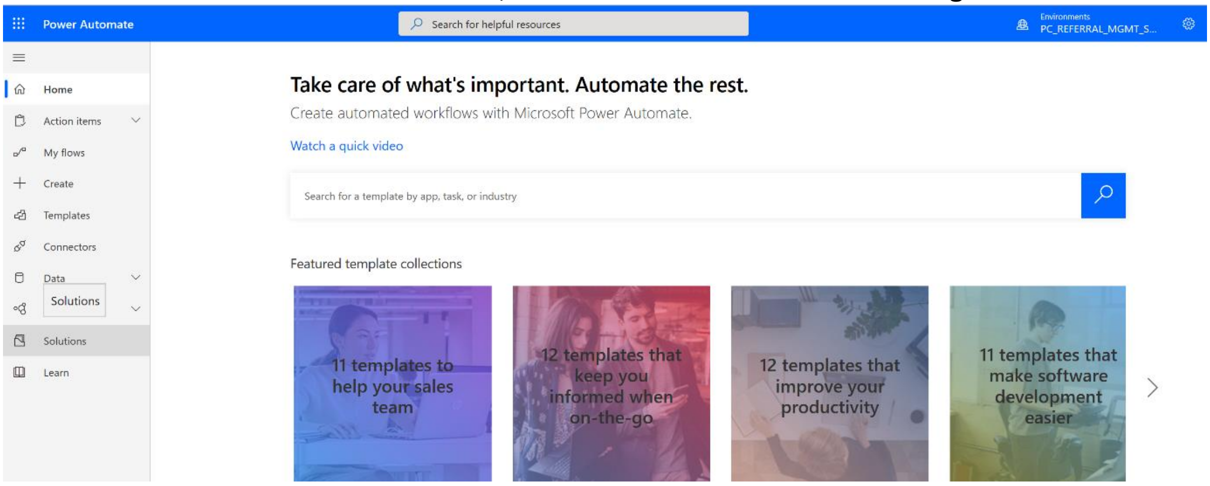
5. Provide the relevant details for creation of database and continue with the database creation process



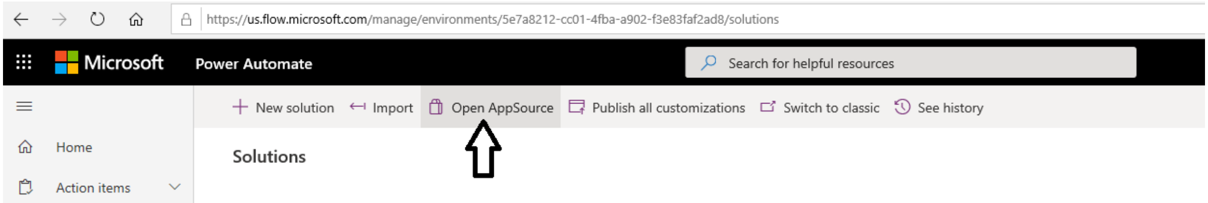
6. Once the environment and database are created, search & select the appropriate CRM environment from the drop-down on the right top corner.



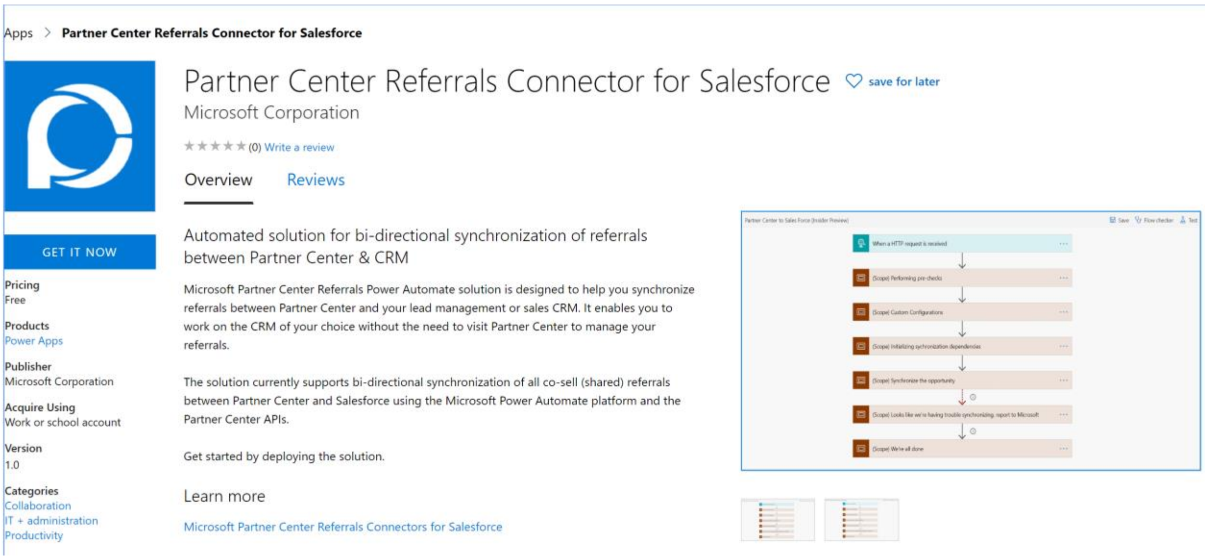
7. Once the CRM environment is created, select “Solutions” on the left navigation bar



8. Click on the 'Open AppSource' link on the top menu

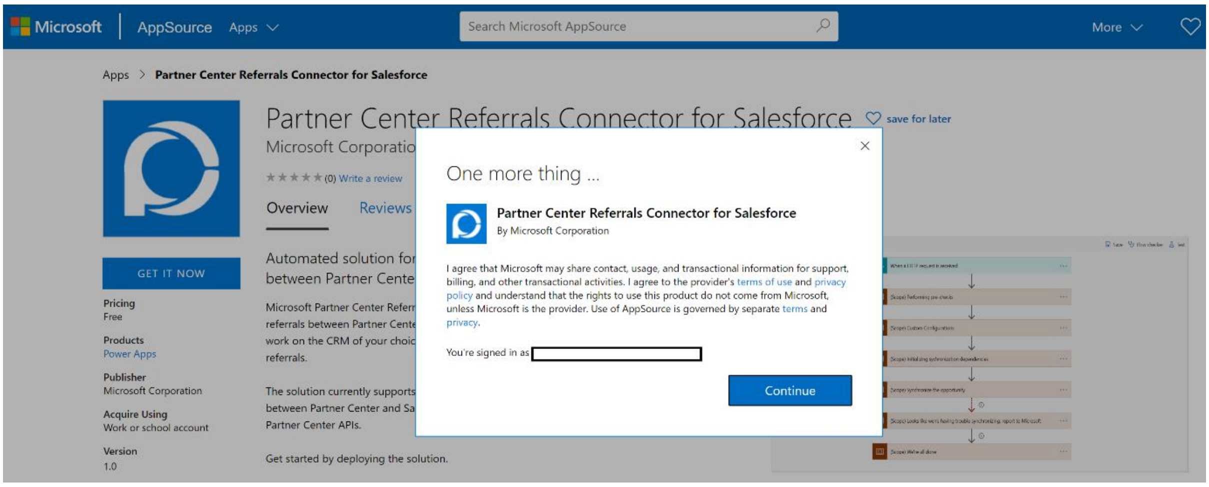


9. Search for “Partner Center Referrals Connector for Salesforce” in the pop-up screen.

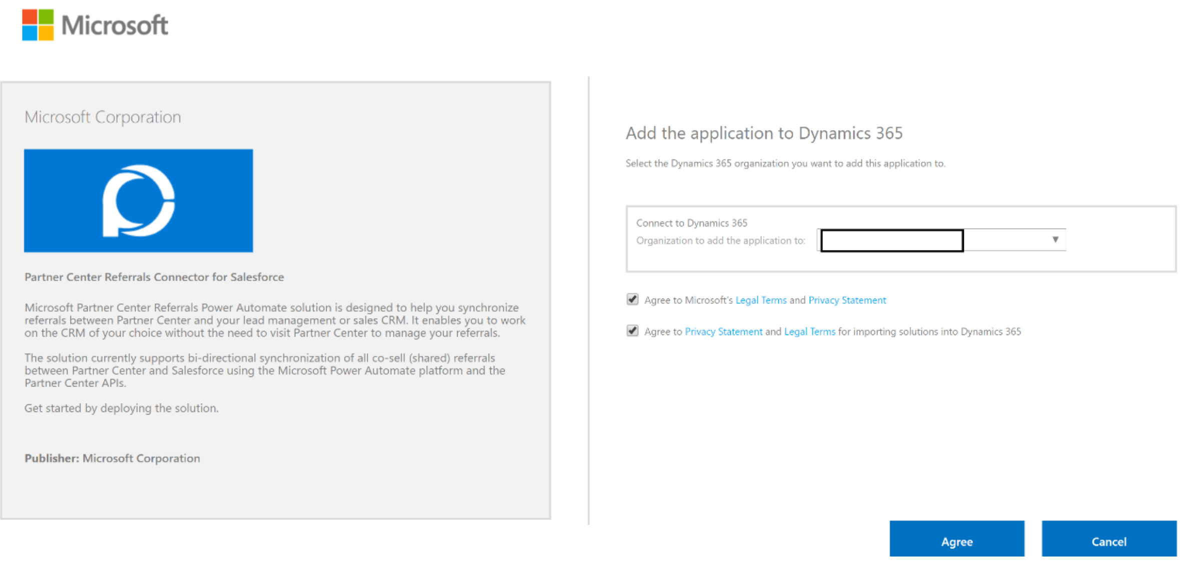


You can also access “Partner Center Referrals Connectors for Salesforce (Power Automate Solution)” solution from here.

10. Click on the “Get it now” button and click on “Continue” button to agree to the terms of use.

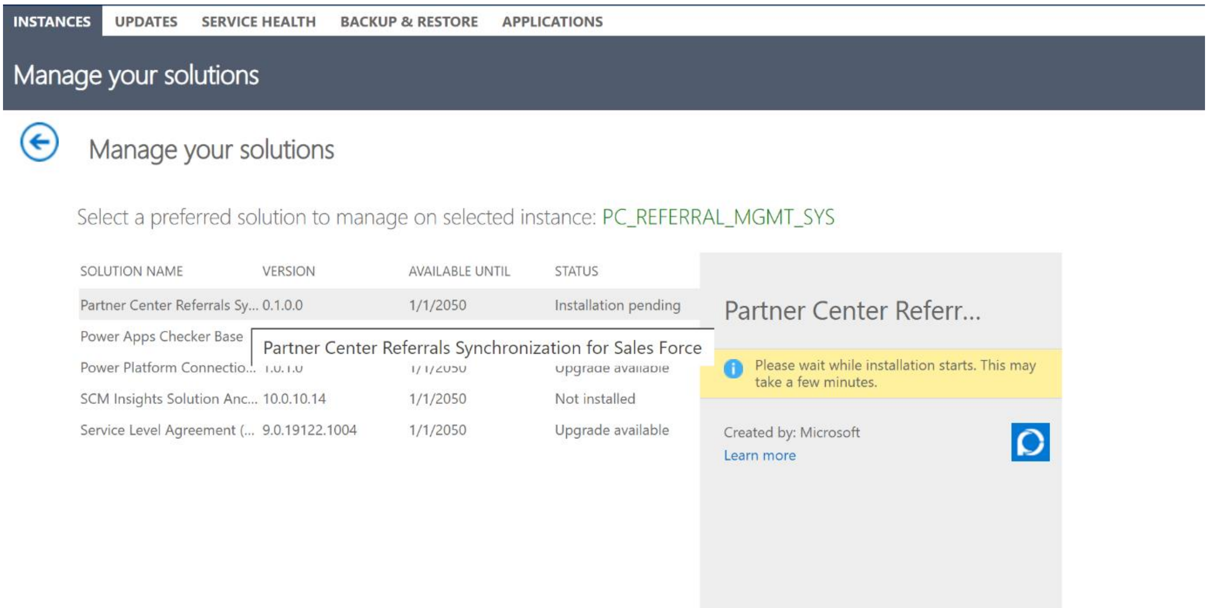


11. After clicking continue, it will direct to a page to choose the CRM (Salesforce) environment to install application. Select your **CRM instance**/environment from the drop-down if not already selected. Agree to terms and condition and select agree.

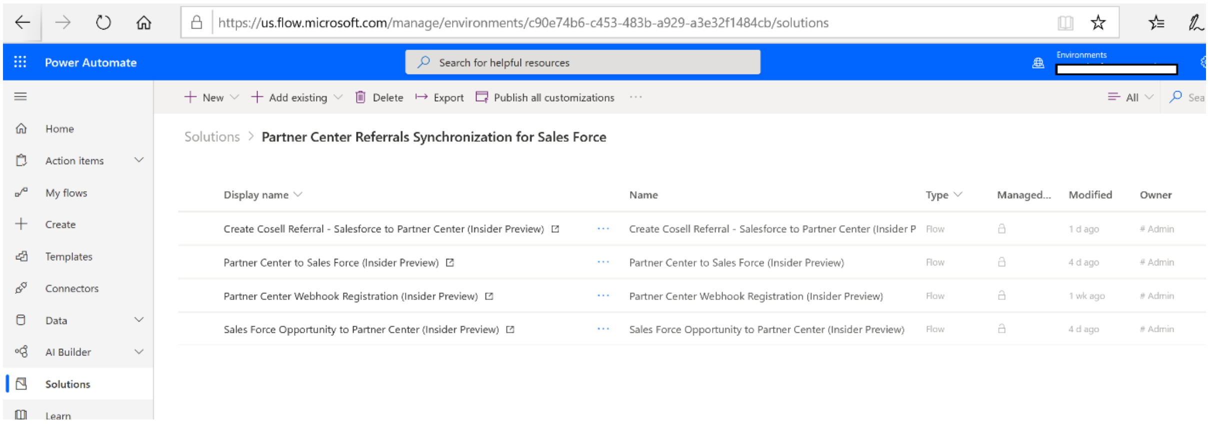


12. After selecting agree, it will direct to a CRM page showing "Manage your solutions". Navigate to "Partner Center Referrals" solution by using the arrow buttons on the bottom. It should show "Installation Pending" against” Partner Center Referrals Synchronization for Salesforce" solution.

    Note: Installation should take around 10-15 minutes.



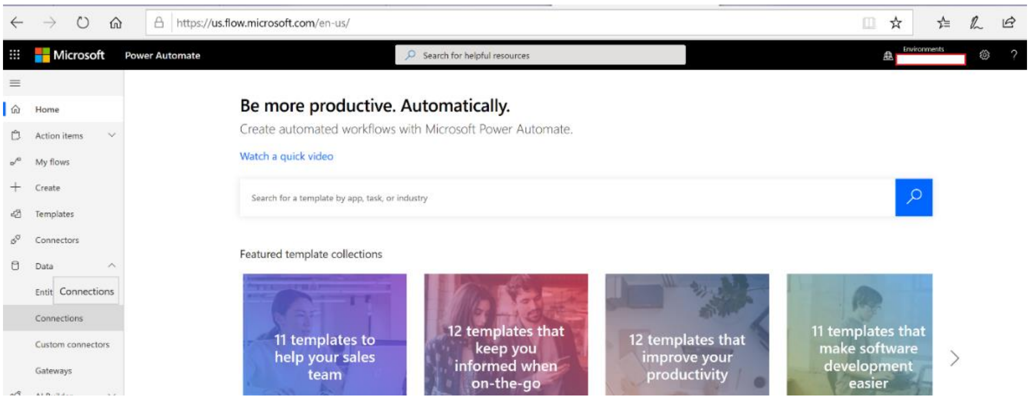
13. Once installed successfully, navigate to https://flow.microsoft.com/ and click on "Solutions" from left navigation area.
14. Ensure that "Partner Center Referrals Synchronization for Sales Force" is available in the Solutions inventory for your CRM instance/environment.
15. Select "Partner Center Referrals Synchronization for Sales Force" from the Solutions page
    a. The following Power Automate flows should be available



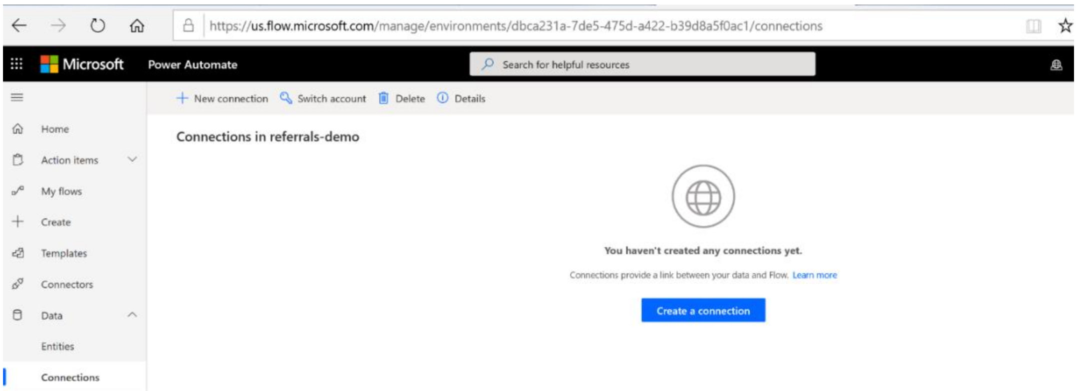
7. Partner Center Referrals Connectors for Salesforce (Power Automate Solution) Configuration Steps

1. Once you have installed "Partner Center Referrals Synchronization for Salesforce" solution in your CRM instance, navigate to https://flow.microsoft.com/
2. From the "Environments" drop-down on the right top corner, search & select the CRM instance where you installed the Power Automate solution.

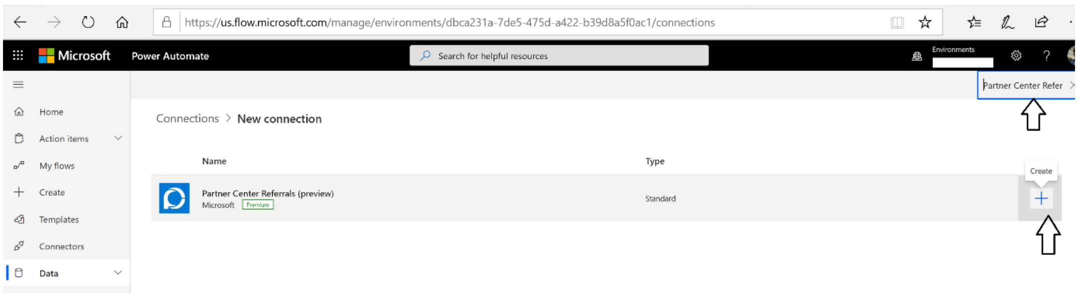
3. You would need to create connections for **associating the three user accounts**: (a.) Partner Center user with referrals admin credentials (b.) Partner Center Events and (c.) Salesforce admin with the Power Automate flows in the solution.
    a. Select "Connections" from the left navigation bar and select the "Partner Center Referrals" solution from the inventory.



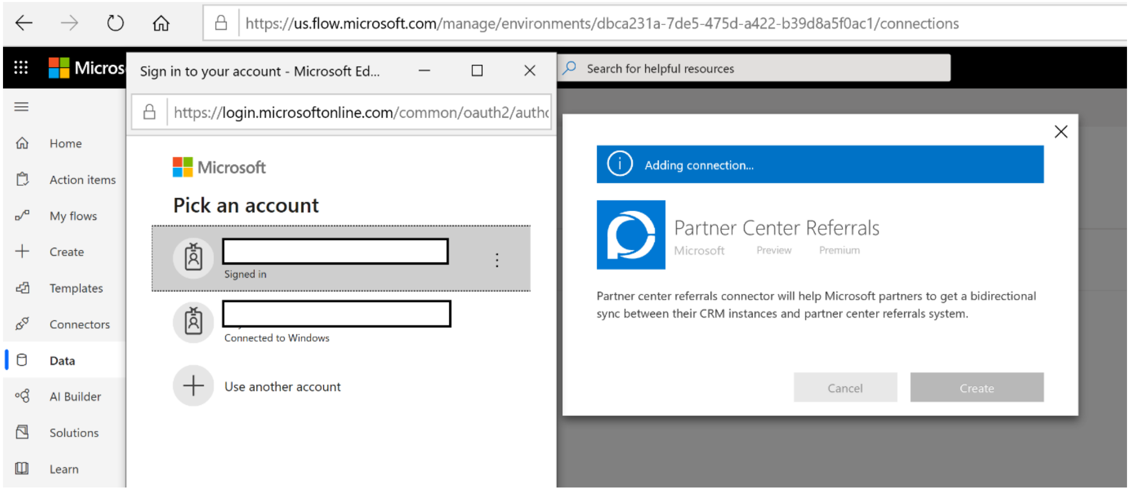
    b. Create a Connection by clicking "Create a connection" button



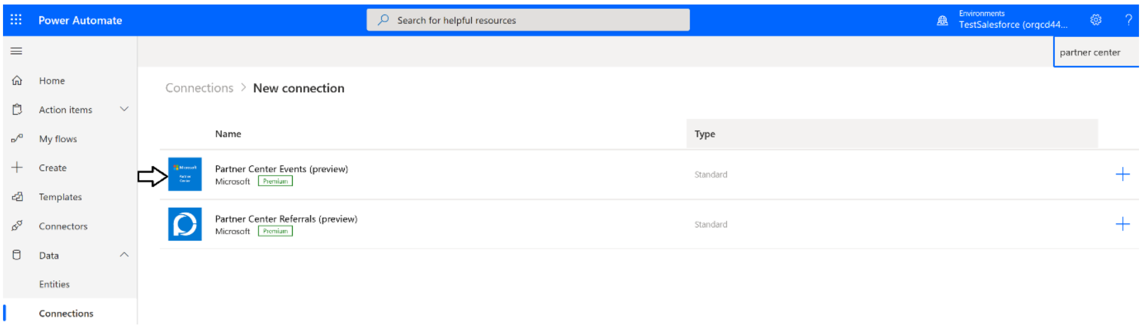
    c. Search for "Partner Center Referrals (preview)" in the search bar on the top right corner



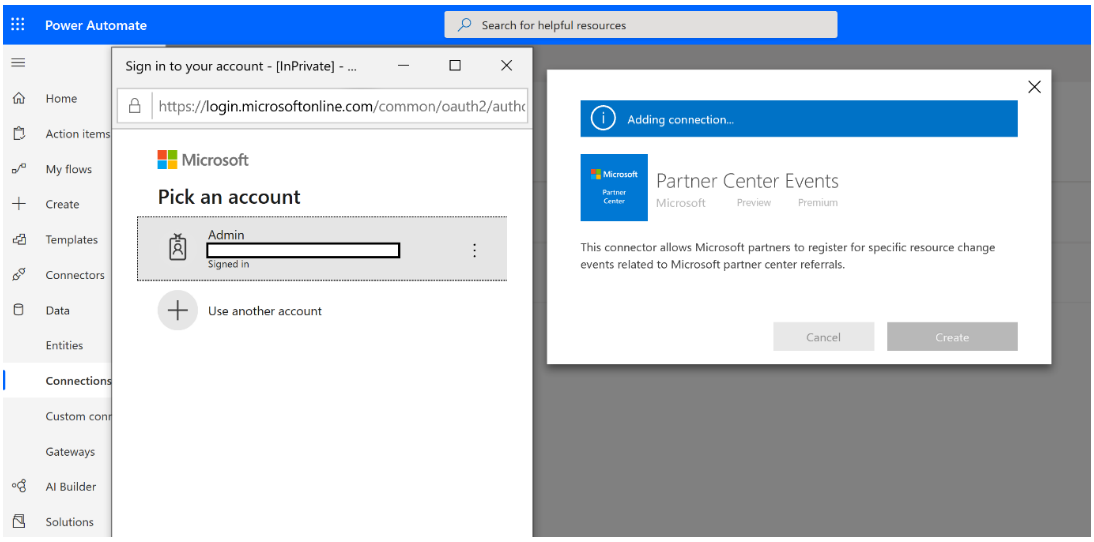
    d. Create a connection for Partner Center user with the credentials of Referrals administrator



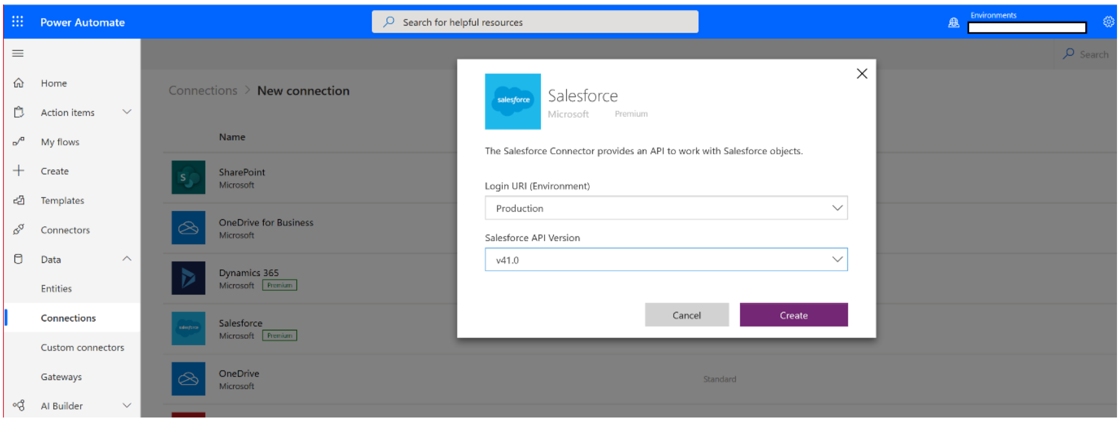
e. Search for “Partner Center Events (preview)” in the search bar on the top right corner



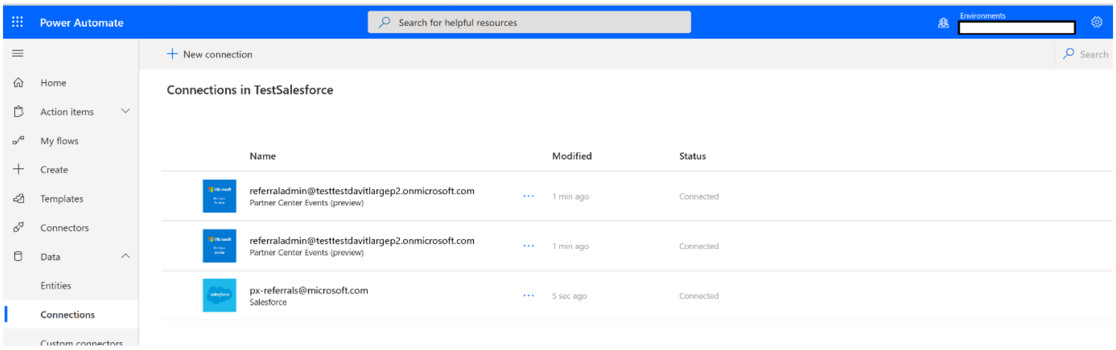
f. In a similar way, create a connection for “Partner Center Events” for Partner Center user with the credentials of Referrals administrator



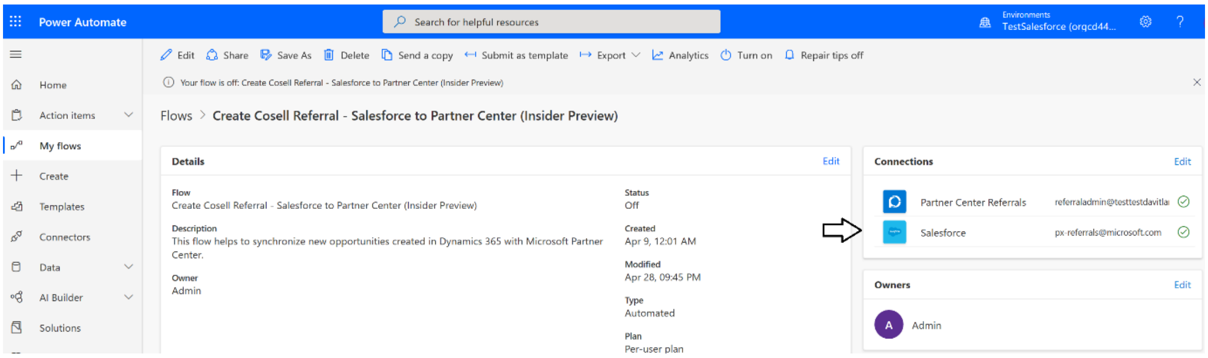
g. Create a new connection for Salesforce administrator user



h. The following connections should get created:

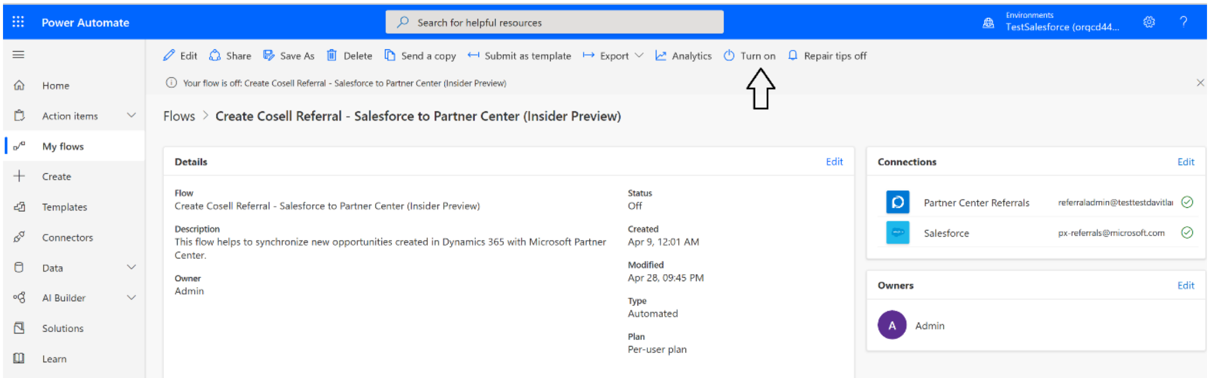


5. To associate the "Power Automate" flows with connection, "Edit" each of the Power Automate flows
   - Also ensure that the Connections are associated with the flows.
   - If "Partner Center Referrals" and "Salesforce" connections are not associated, you would need to associate the connections to the flows



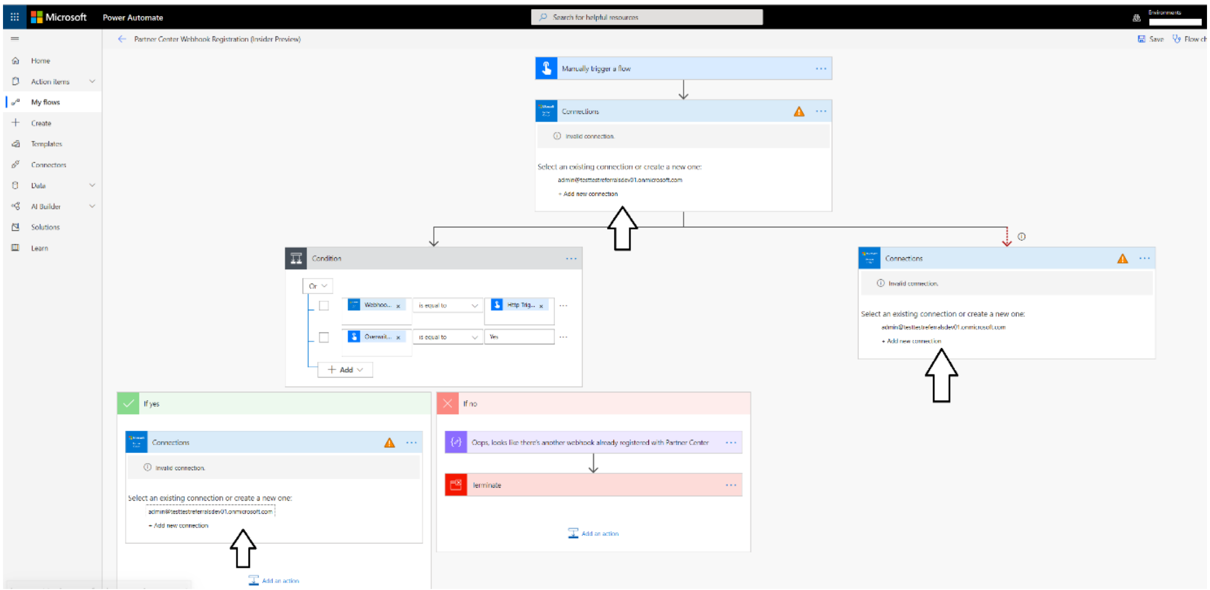
6. Once you have enabled the Power Automate flows to connect to Salesforce and Partner Center Referrals connections, save the changes made to the Power Automate flow

7. Ensure that the "Connections" are associated with the Power Automate flow and "Turn on" the Power Automate flow

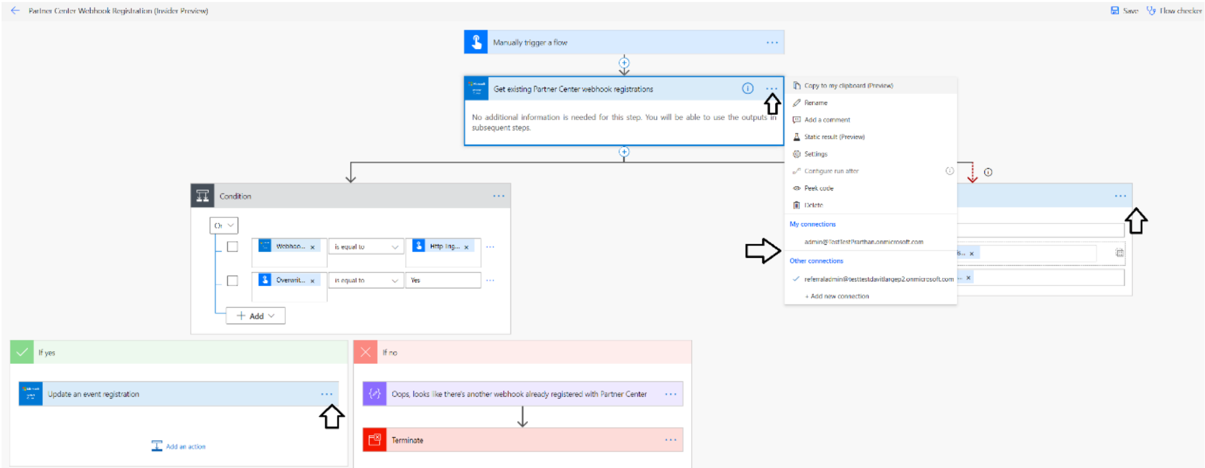


8. The Partner Center Webhook APIs allow partners to register for resource change events. These events are delivered in the form of HTTP POSTs to the partner's registered URL. This Power Automate flow helps you register the desired url to the list of events you want to receive. Select "Partner Center Webhook Registration (Insider Preview)" Power Automate flow and ensure that connections are available for (a.) Partner Center user with referrals admin credentials (b.) Partner Center Events as highlighted below.

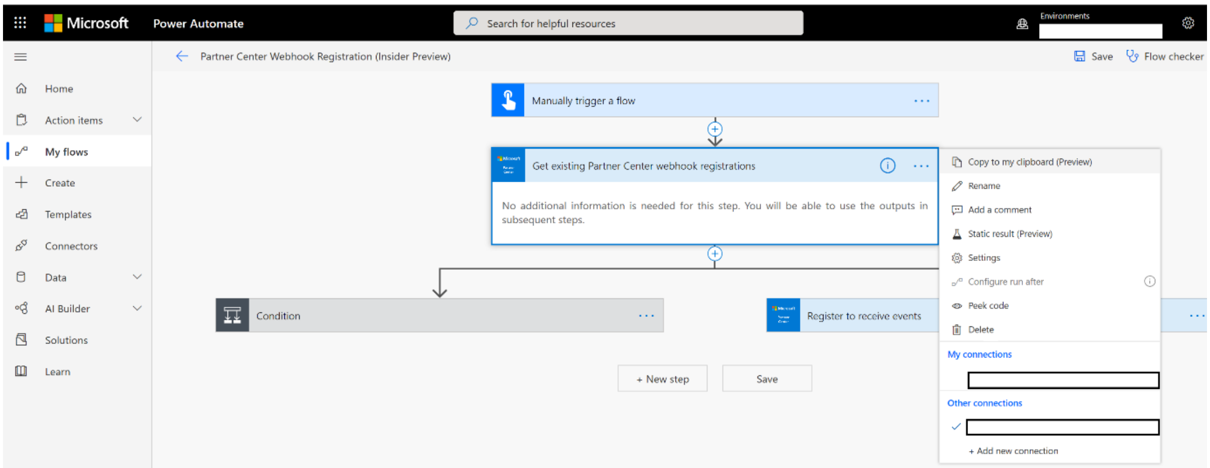
   - If connections are not available, please add the connections



   - Click on the 3 dots highlighted sections to associate connections with the flow



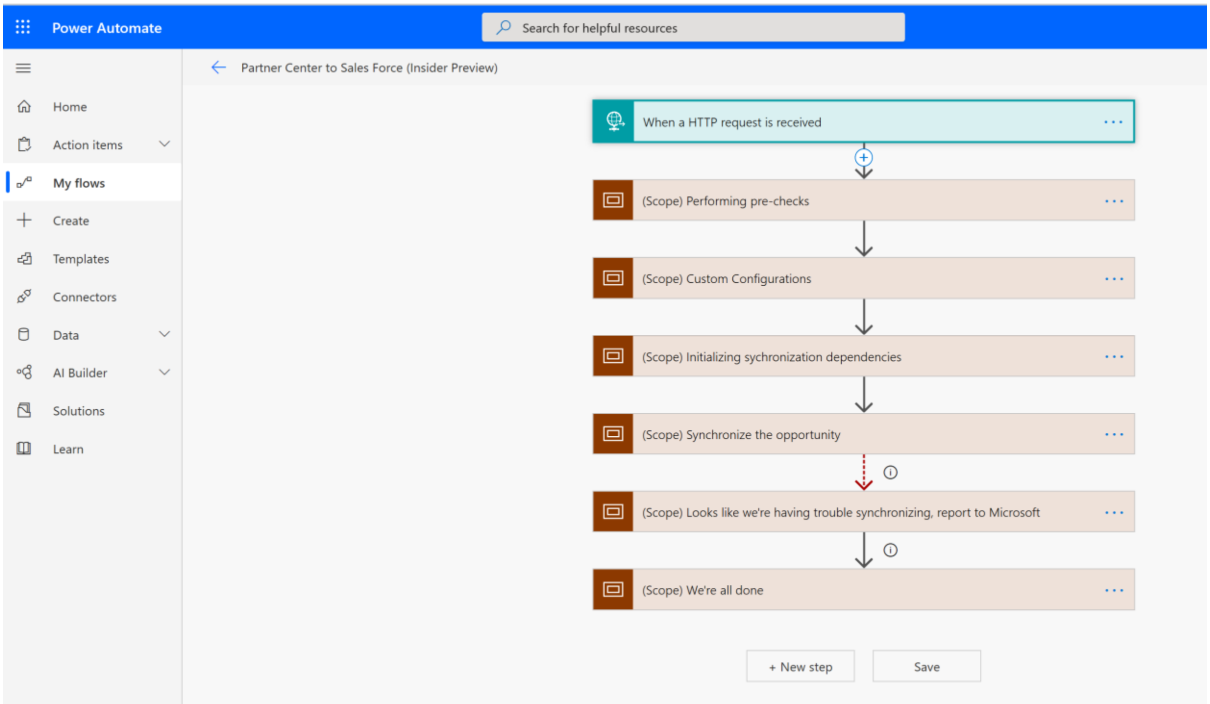
9. Once connections are set up for the previous step, you will get the following information.



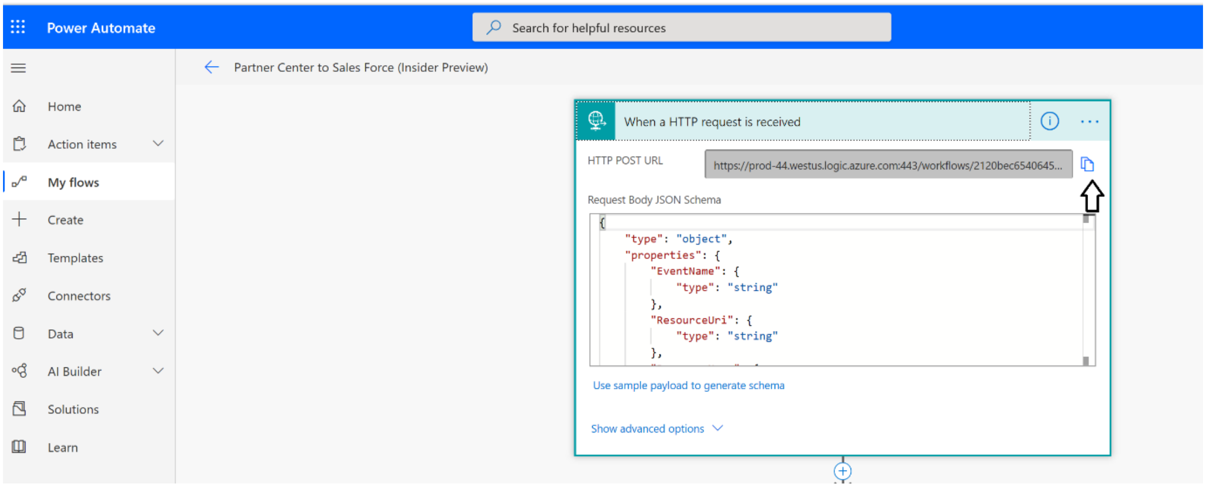
10. Save the changes made to the Power Automate flow and turn it ON by clicking "Turn on" icon

In order to enable Partner Center webhook to listen to changes in the events related to creation and updating of the IP Co-sell/independent referral objects in PC and CRM systems for bi-directional synchronization, the following steps need to be performed.

11. Select the Power Automate flow titled "Partner Center to Salesforce (Insider Preview)"
12. Click on "Edit" icon to edit the Power Automate flow and Click on the Step "When a HTTP request is received"



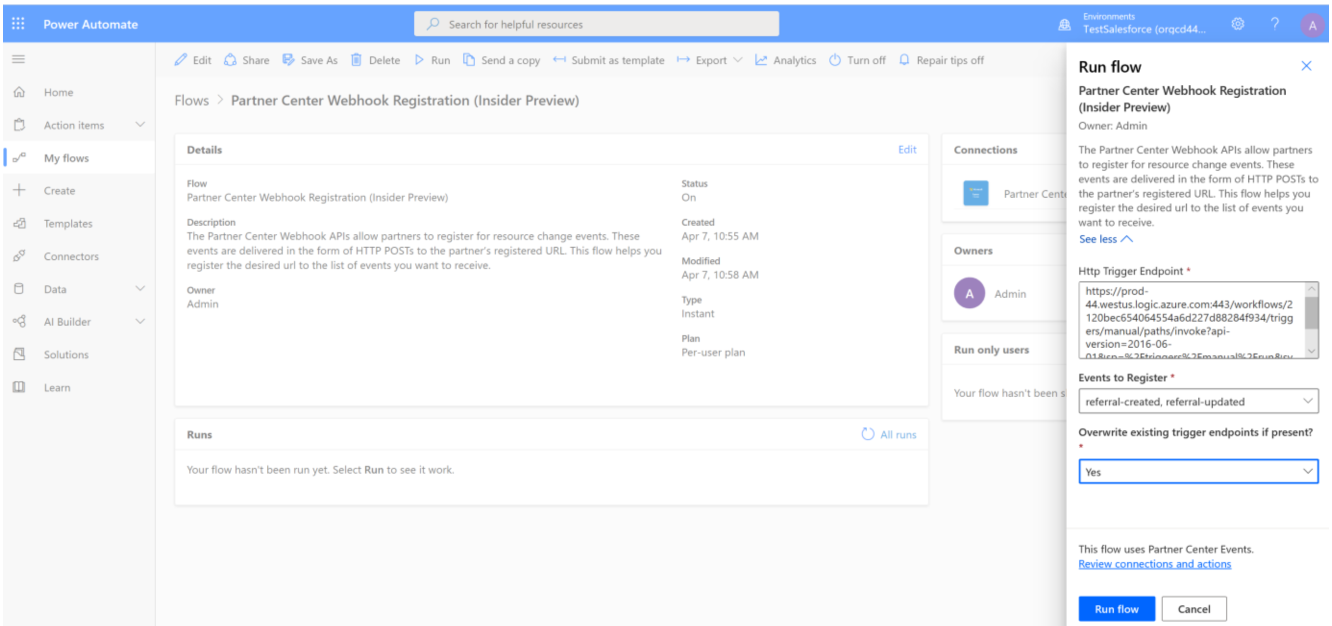
13. Click on the “Copy” icon to copy HTTP POST URL



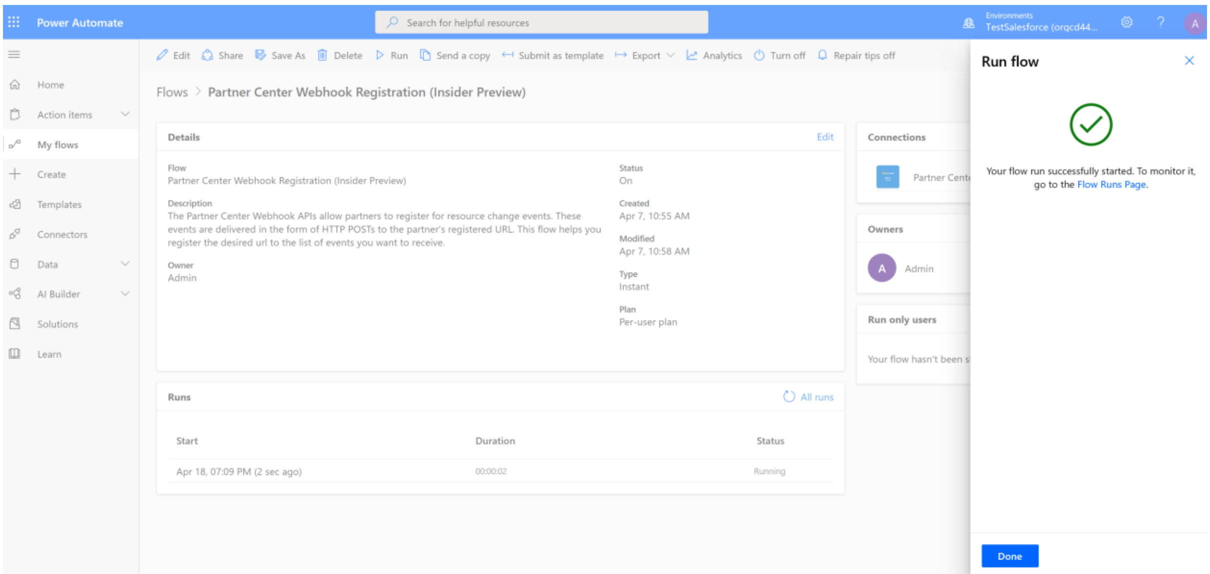
14. Now select the “Partner Center Webhook Registration (Insider Preview)” Power Automate flow and click on the “Run” icon
15. Ensure that the “Run Flow” window opens on the right-hand pane and Click “Continue” button
16. Enter the following details and click on “Run flow” button:
    a) Http Trigger Endpoint: URL copied from earlier step [Power Automate Flow: “Partner Center to Salesforce (Insider Preview)”, Step: “When a HTTP request is received” and Field: HTTP POST URL]
    b) Events to Register: “referral-created” and “referral-updated”
    c) Overwrite existing trigger endpoints if present: Yes

(**Note:** *If you are using the webhook for some other event this it will be overwritten with new endpoint and your old endpoint won't be triggered anymore*)

This enables the webhook to listen to changes (create and update events) in the IP Co-sell/independent referral objects in PC and CRM systems for bi-directional synchronization.



17. Once you run Partner Center Webhook Registration Power Automate flow, ensure that the run is successful and click on "Done" button



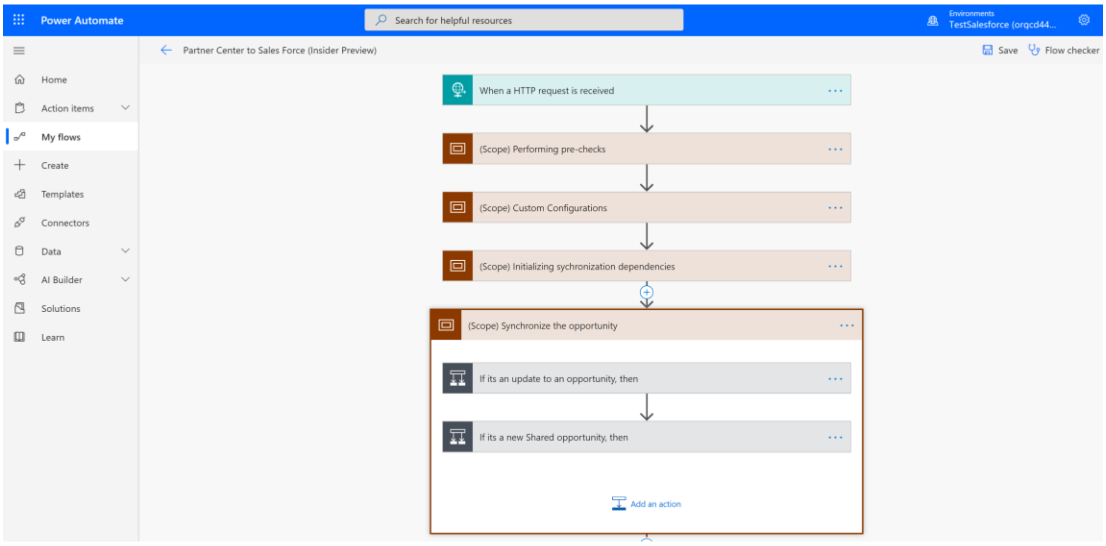
8. Partner Center Referrals Connectors for Salesforce (Power Automate Solution) Customization Steps

Using Microsoft Partner Center Referral Power Automate solution, when referrals are synced between Partner Center and partner's CRM system, the fields that get sync-ed on PC are listed here.

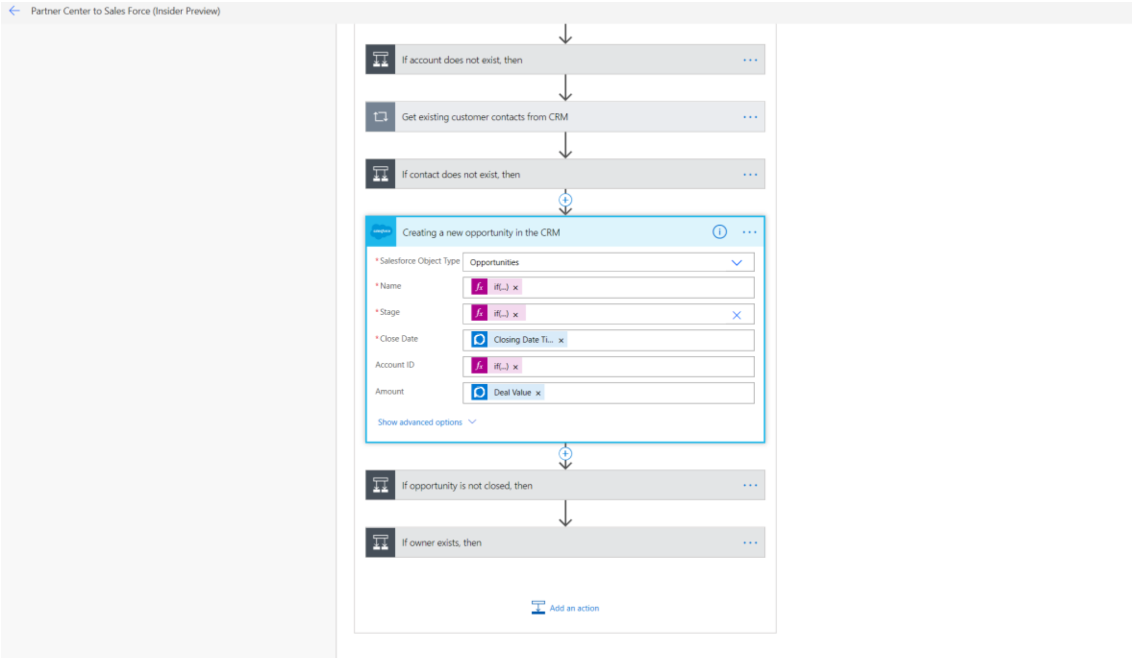
Since partner CRM systems are highly customized, it's advisable for the partners to follow the field mapping guide and if required make appropriate changes in the steps of the Power Automate flows. In the various steps of the Power Automate flows, Microsoft Partner Center to CRM mappings are provided. Based on your CRM environment, you can choose to customize the fields based on the field mappings guide.

Multiple steps of each of the Power Automate flows can be customized based on your need. The following section would show few such customization that you can do in the Power Automate flow connectors of the solution.

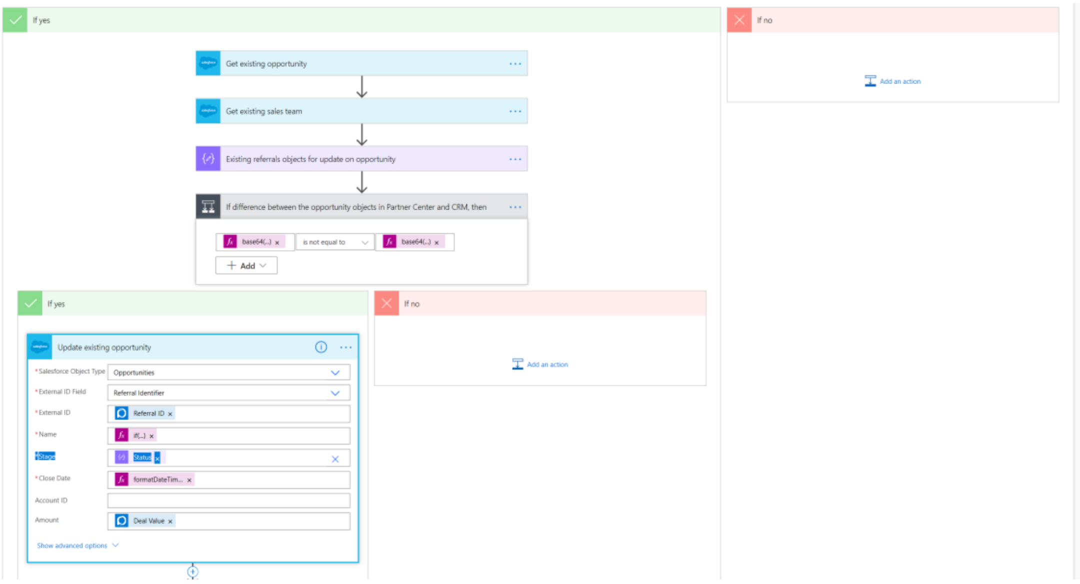
1. How to customize the fields for Partner Center to CRM referral synchronization for create or update events?
    a. Select the Power Automate flow "Partner Center to Salesforce (Insider Preview)"
    b. Click on Edit icon to edit/customize the Power Automate flow
    c. Click on the step "(Scope) Synchronize the opportunity"



    d. For customizing CRM field mappings (based on field mappings guide) for create events, click on the step "If it's new Shared opportunity, then". Click on the sub-step "if yes" and then expand the step "Creating a new opportunity in the CRM".
    e. You can edit the mappings in this section based on the Field Mappings Guide.

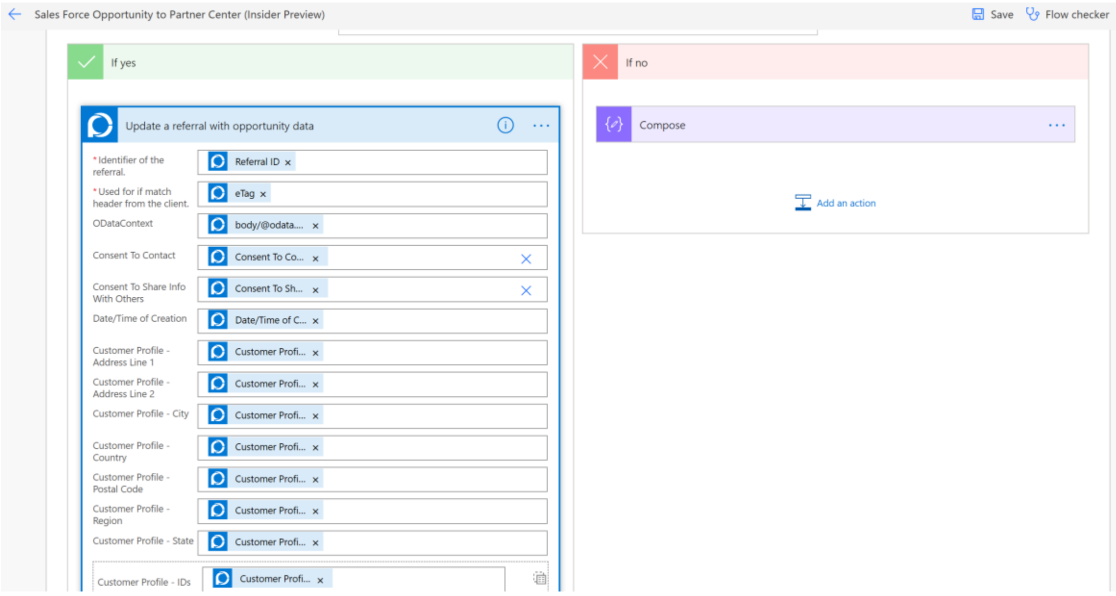


f. For customizing CRM field mappings (based on field mappings guide) for update events, click on the step "(Scope) Synchronize the opportunity".
g. Click on the step "If it's an update to an opportunity, then". Click on the sub-step "if yes" and then expand the step "If difference between the opportunity objects in Partner Center and CRM, then".
h. Click the step "If yes" followed with "Update existing opportunity"
i. You can edit the mappings in this section based on the Field Mappings Guide.

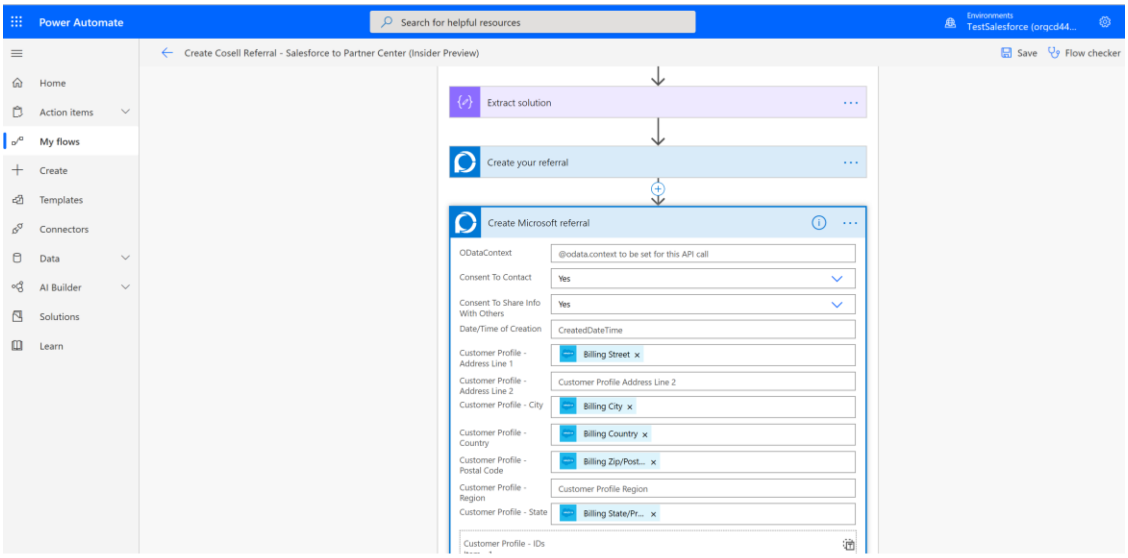


2. How to customize the fields for CRM to PC referral synchronization for update events?
   a. Select the Power Automate flow "Sales Force Opportunity to Partner Center (Insider Preview)"
   b. Click on Edit icon to edit/customize the Power Automate flow

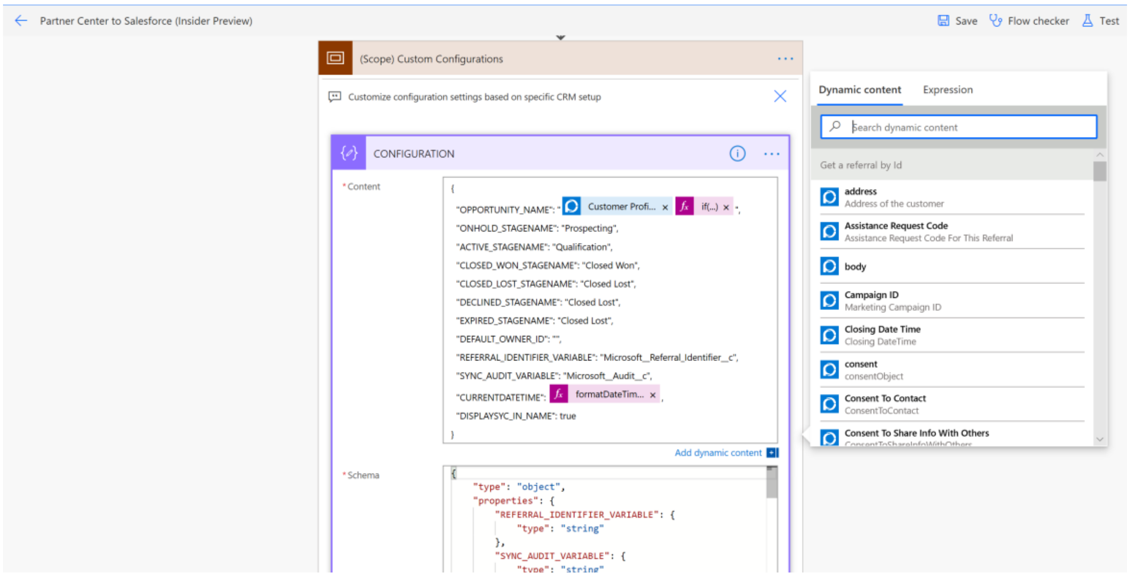
c. Click on the step “(Scope) Synchronize the opportunity”
d. For customizing CRM field mappings (based on field mappings guide) for update events, click on the step “If there is difference between the lead objects in Partner Center and CRM, then”.
e. Click on the sub-step “if yes” and then expand the step “Update a referral with opportunity data”.
f. You can edit the mappings in this section based on the [Field Mappings Guide](#).



3. How to customize the fields for CRM to PC referral synchronization for create events?
a. Select the Power Automate flow “Create Cosell Referral - Salesforce to Partner Center (Insider Preview)”
b. Click on Edit icon to edit/customize the Power Automate flow
c. Click on the step “(Scope) Synchronizing Referrals”
d. For customizing CRM field mappings (based on field mappings guide) for create events, click on the step “Create Microsoft Referral”.
e. You can edit the mappings in this section based on the [Field Mappings Guide](#).



4. How to customize configurations settings based on specific CRM setup?
   For each of the flows in the solution, there is a step called "(Scope) Custom Configurations". As an example:
   a. Select the Power Automate flow "Partner Center to Salesforce (Insider Preview)"
   b. Click on Edit icon to edit/customize the Power Automate flow
   c. Click on the step "(Scope) Custom Configurations"
   d. Expand the sub-step "Configuration" and make appropriate changes based on your CRM configuration:



9. Create Separate Section in Salesforce CRM Opportunity Layout

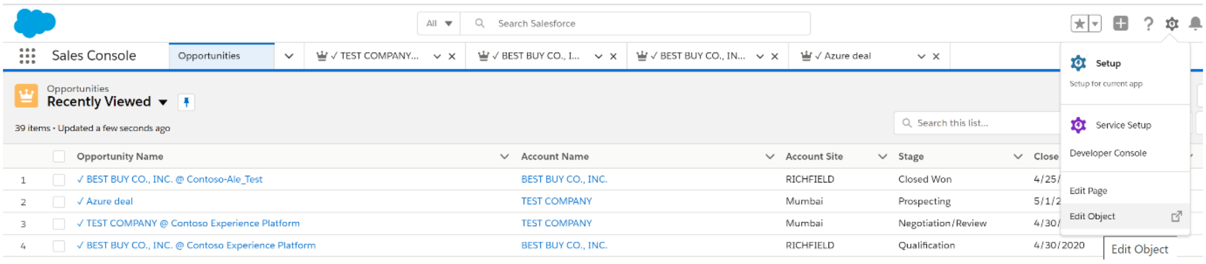
To synchronize the referrals across Microsoft Partner Center and Salesforce CRM, the Power Automate solution would need to have an inherent ability to clearly demarcate Microsoft specific referral fields. This de-alienation also provides partner seller teams the ability to decide which referrals they would want to share with Microsoft for co-selling.

Salesforce CRM administrator user would need to create a separate CRM section. The CRM section would comprise of the custom fields as shown above.

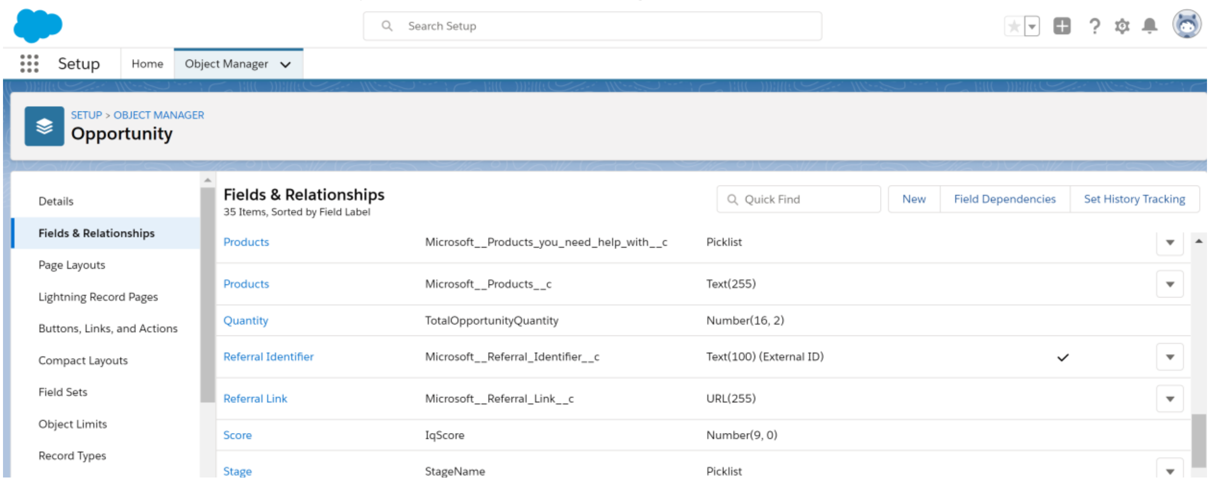
Following is a description of the custom fields that should be part of the Salesforce CRM section

- Sync with Partner Center: Whether to sync the opportunity with Microsoft Partner Center
- Referral Identifier: A read-only identifier field for Microsoft Partner Center referral
- Referral Link: A read-only link to the referral in Microsoft Partner Center
- How can Microsoft help? Help required from Microsoft for the referral
- Products: List of products associated with this opportunity
- Audit: A read only audit trail for syncing with Microsoft Partner Center referral

1. Log into Salesforce account and go to Opportunity page
2. Click on the “Setup” and “Edit Object” option to add the necessary fields



3. Select “Fields & Relationships” from the left navigation



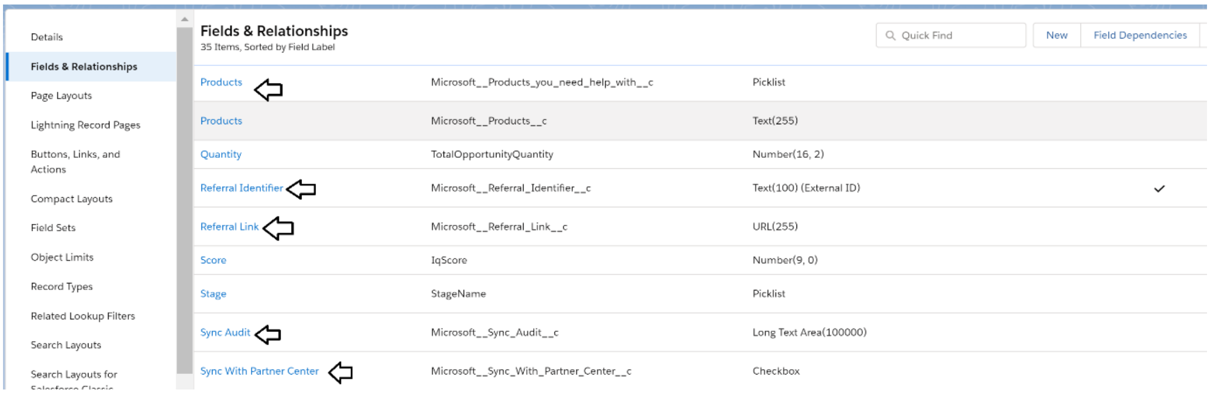
4. Add the following fields in the “Fields & Relationship” of Salesforce CRM

FIELD LABEL	FIELD NAME	DATA TYPE	INDEXED
Sync With Partner Center	Sync_With_Partner_Center__c	Checkbox (default unchecked)	
Products	Products__c	Text(255)	
Referral Identifier	Referral_Identifier__c	Text(100) (External ID)	✓
Referral Link	Referral_Link__c	URL(255)	
Audit	Audit__c	Long Text Area(100000) (visible line 4)	
How can Microsoft help?	How_can_Microsoft_help__c	Picklist *	

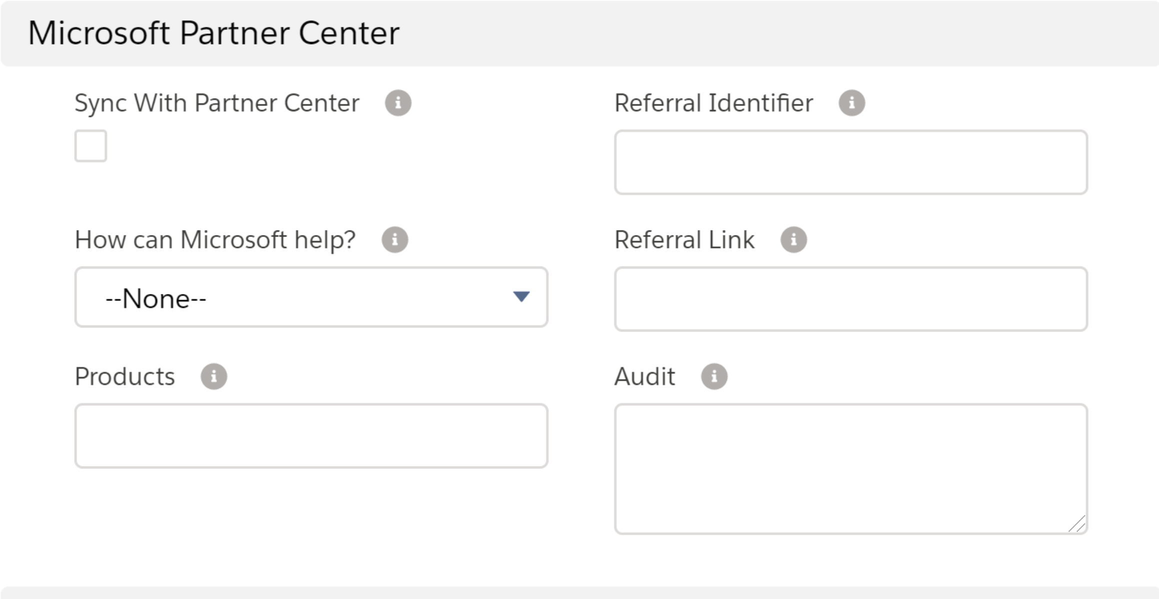
******<u>*Picklist values are*</u>

- Workload Specific Value Proposition
- Customer Technical Architecture
- Proof Of Concept or Demo
- Quotes or Licensing
- Post Sales Customer Success
- General or Other

5. The fields would get created in Salesforce CRM under “Fields & Relationships”



6. Once the fields are created, in the Opportunity layout create a separate section with the fields as listed above.
    - This section should be available for the Sellers in the Opportunity layout

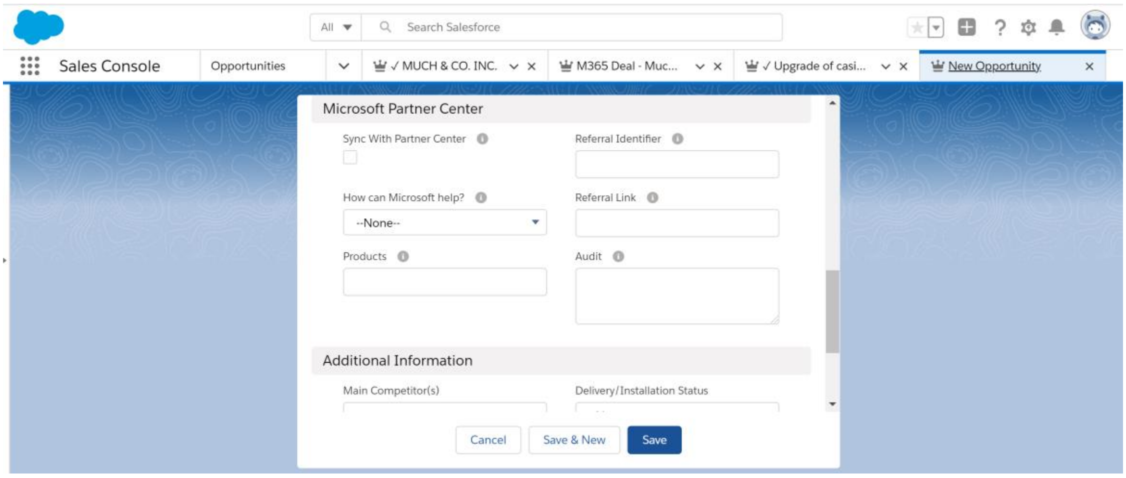


10.End-2-End Bi-directional Referral Synchronization

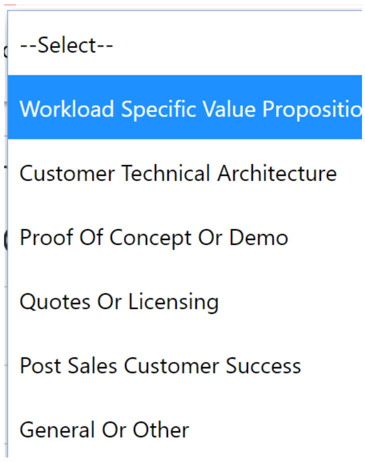
Once the Power Automate solution is installed, configured, and customized, you can now test for end-2-end bi-directional referral synchronization between Salesforce and Microsoft Partner Center.

SCENARIOS:

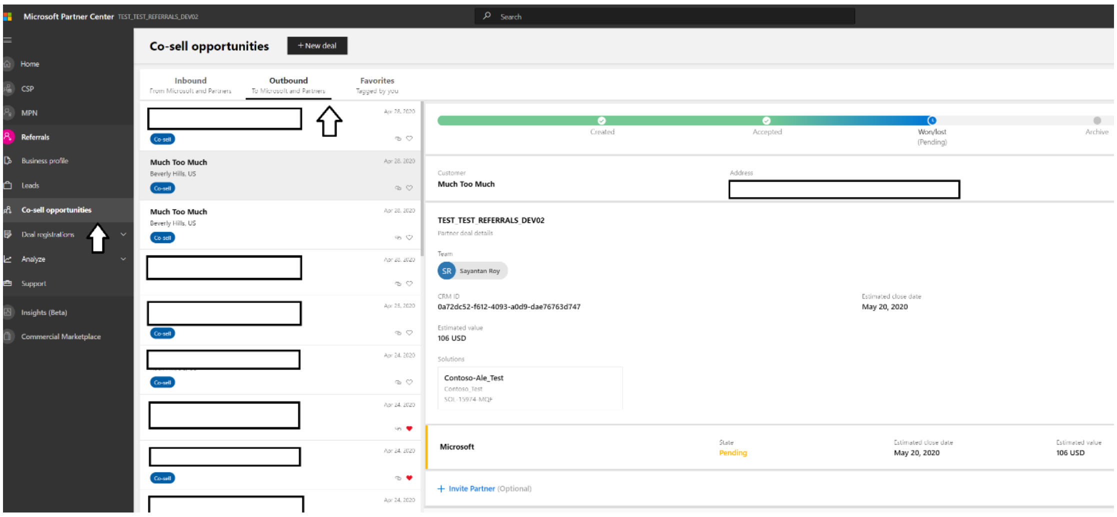
1. Referral Synchronization when referral is created or updated in CRM and sync-ed in Microsoft Partner Center
    a. Log into your Salesforce CRM environment with user who has visibility in the Opportunity section of the CRM
    b. Ensure that the following section is present when you create a "New Opportunity" in Salesforce environment



c. To synchronize this opportunity with Microsoft Partner Center, ensure that you set the following fields in the card view:
   i. “Sync with Partner Center”: Yes
   ii. Products: Solution IDs of the product
   iii. “How can Microsoft help?”: Select from the following:

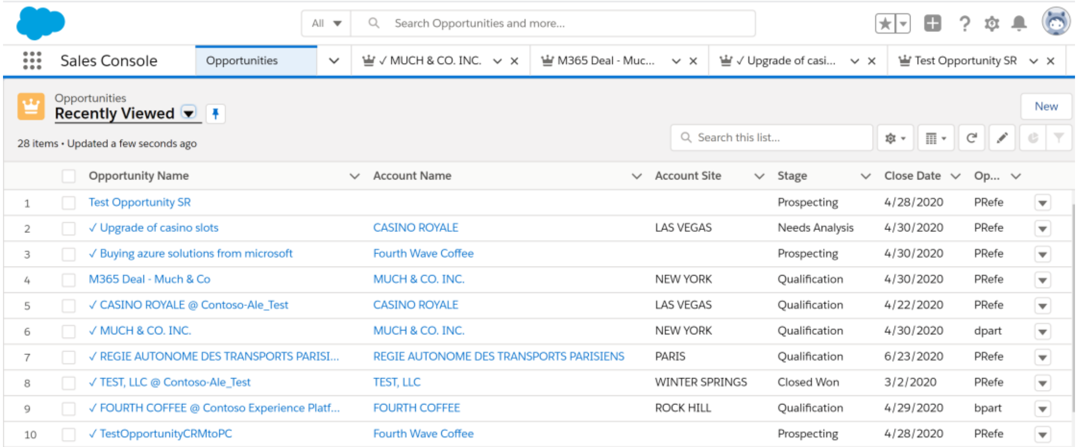


d. Once the opportunity is created in Salesforce with “Sync with Partner Center” option set to “Yes”, after 1 minute, log in to Microsoft Partner Center account and you will find the referral synchronized from Salesforce by navigating to “Outbound” tab box under “Co-sell opportunities”

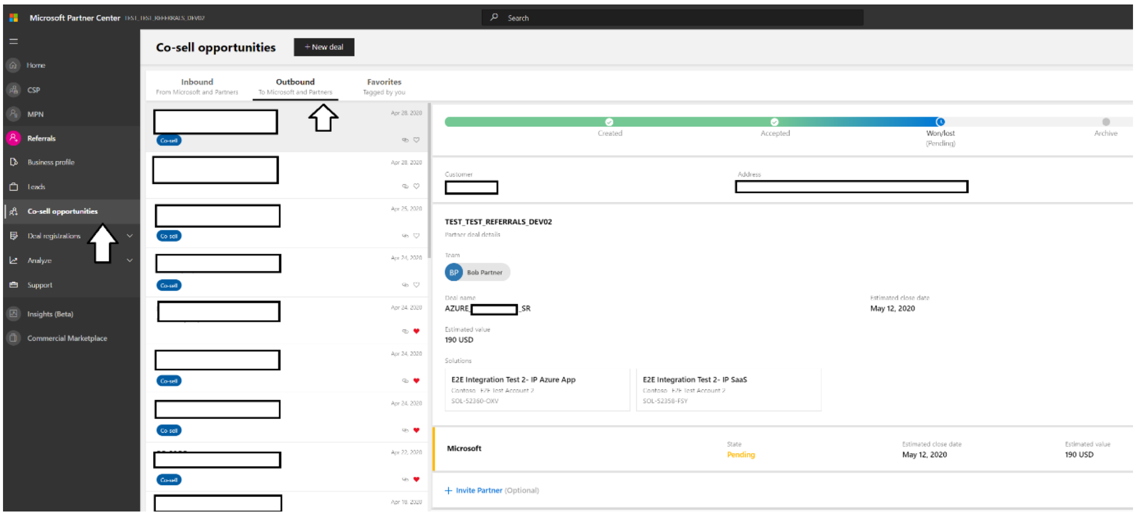


e. Consequently, for an opportunity that had “Sync with Partner Center” option set to “Yes”, if you want to update the opportunity in Salesforce CRM, then the changes would get synchronized in your Microsoft Partner Center account.

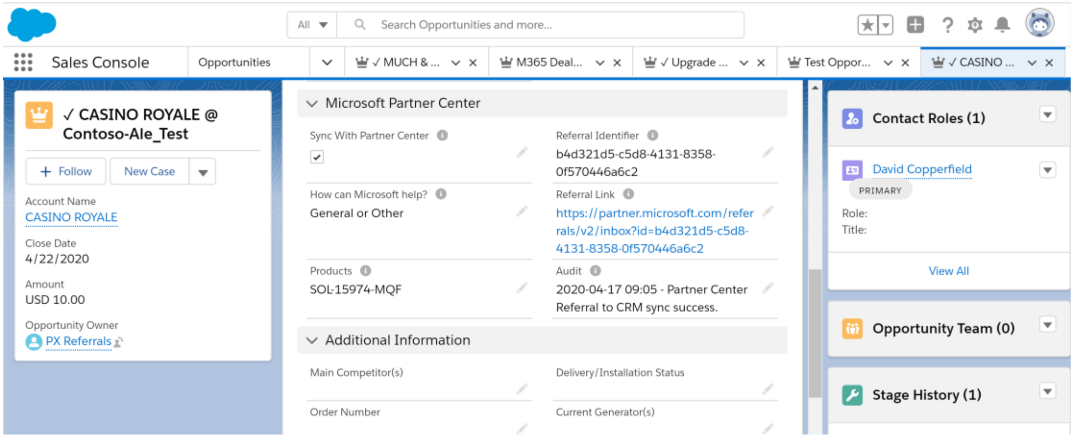
f. Opportunities that are synchronized successfully with Microsoft Partner Center will be enumerated with ✔ icon in Salesforce



2. Referral Synchronization when referral is created or updated in Microsoft Partner Center and synchronized in Salesforce environment
    a. Log into your Microsoft Partner Center account having access to Referrals section in the left-navigation.
    b. Create a new Co-sell opportunity by navigating to “Outbound” tab box under “Co-sell opportunities”



    c. Log into your Salesforce CRM environment with user who has visibility in the Opportunity section of the CRM
    d. Navigate to Opportunities in Salesforce and you will find that the referral created in Microsoft Partner Center is synchronized in Salesforce CRM
    e. When you select the referral that was created in Microsoft Partner Center and automatically synchronized referral in Salesforce, you will see that the card view details are populated



f. Consequently, if you update an existing opportunity in Microsoft Partner Center, then the corresponding changes for the referral would get synchronized in your Salesforce environment.

11.Field Mapping Guide

It's advisable for the partners to follow the field mapping guide and if required make appropriate changes in the steps of the Power Automate flows.

PartnerCenterReferralsCRMMappings.xls:

12.Common Troubleshooting

1. Do you need a Dynamics365 subscription to use Salesforce Connectors solution?

   The Salesforce Connectors solution is of type "Dynamics Flow" that supports synchronizing into other CRM systems. The solution doesn't require you to have Dynamics 365 instance.

2. Can you use a trial Co-sell Referrals Connectors solution for your environment?

   If you are on the test/staging environment, you can go for trial solution. The paid version of the Connectors is available in AppSource at US$ 15/month. With that connection, you will be getting 10K API calls per day. The Connectors are wrappers on top of Partner Center referral APIs. Whenever the connector solutions run for a Create or Update event on the opportunities on either PC or CRM side, an API call is made.

3. How do you troubleshoot in case of failures during Power Automate flow execution?

   To ensure that your Power Automate flows run as you expect and to troubleshoot failures during execution, please refer to the link below: https://docs.microsoft.com/en-us/power-automate/fix-flow-failures

4. What role would you need to create sections in Salesforce environment?

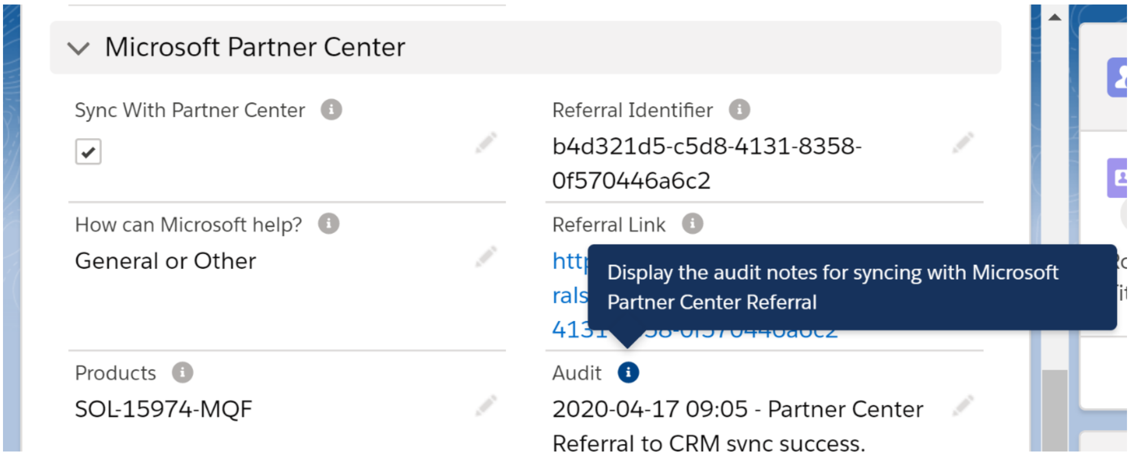
   App users can personalize the system and even share some of their customizations with others, but only users with the correct privileges (System Administrator and System Customizer) can apply changes for everyone.

5. Do partner sellers need special roles to work on Partner Center?

   Partner sellers in the Partner Center tenant would need Partner Center user account with "Referrals admin" roles.

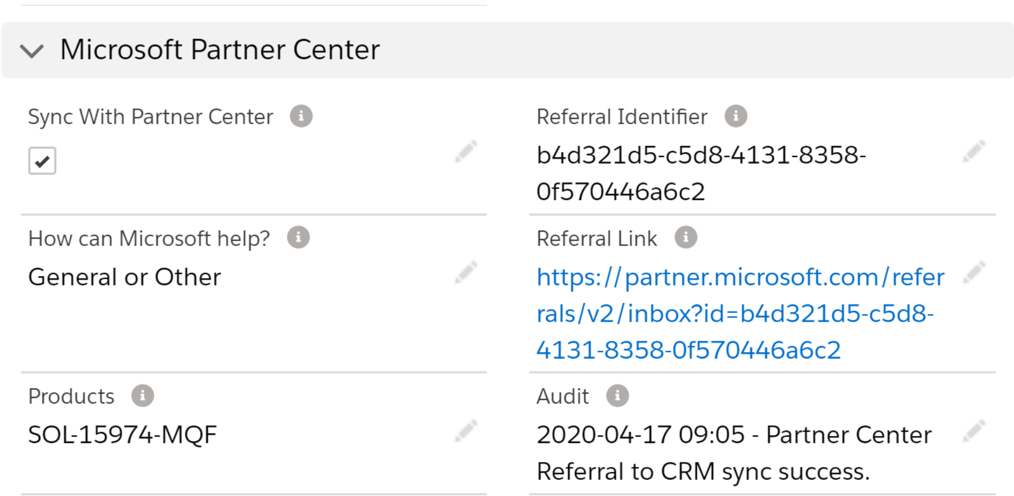
6. What should you do if you see referrals are not synchronized properly on Microsoft Partner Center or Salesforce environment?

   Partners can refer to the Audit section to know status of referral synchronization



7. Under what conditions a referral won't synchronize bi-directionally

   Please ensure the following checks:
   - Partner sellers need to ensure that they have enabled "Sync with Partner Center" option in the CRM section.



- Sellers would need to provide revenue and closing date when qualifying a lead.
- If CRM id is provided in create or update of co-sell opportunity and if a lead/opportunity with that id is not found in CRM, then update or create will be ignored for that opportunity.
- Ensure that referral currency field is configured on Salesforce environment.

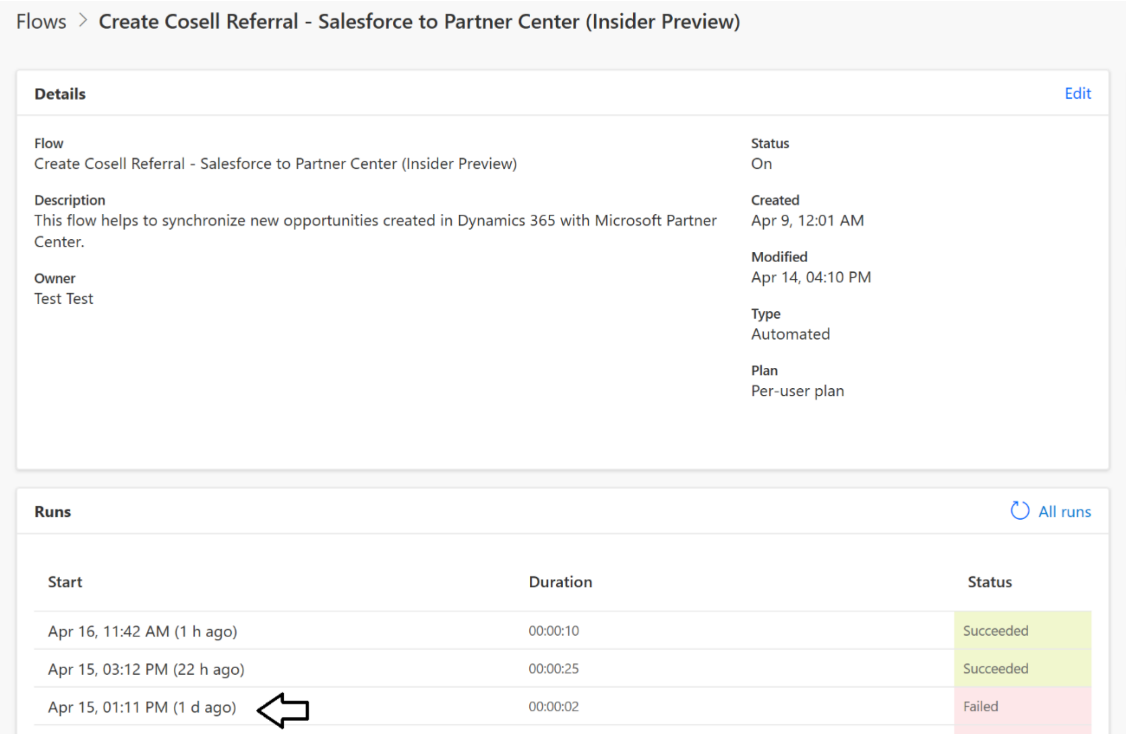
8. What are the fields that need to be set-up apriori in your Salesforce environment?

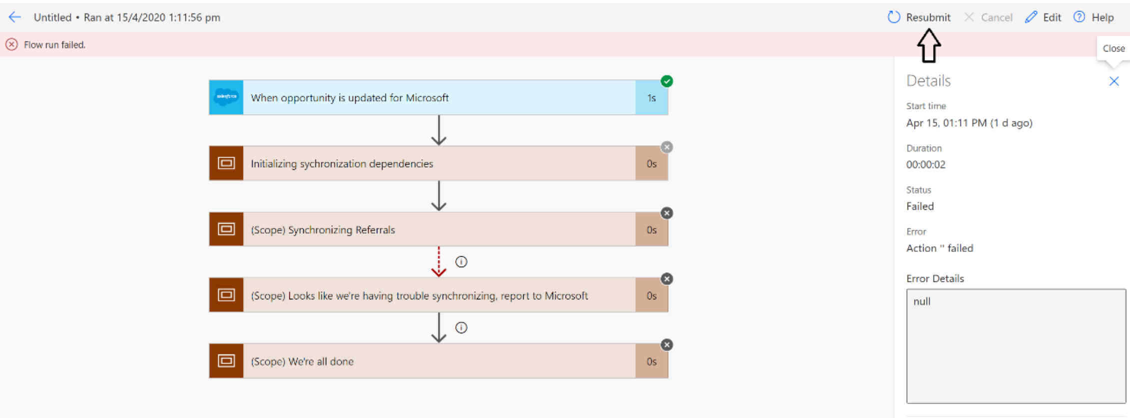
    - Based on the partner's operating regions, currencies should apriori exist in your CRM environment.
    - Partner sales team should apriori exist in your CRM environment as CRM users.

9. What should you do if the connector gets disconnected thereby leading to missed referral bi-directional synchronization?

    Following are few of the options that you can try out:

    a. Please check whether username or password has expired for the Partner Center user with referral admin roles.
    b. You can go to the un-synchronized opportunity, make any minor update, and observe whether the referral has synchronized.
    c. If the flows have run and failed, then you can select the flow and re-submit the run which has failed





10. What should you do when you get access denied errors?

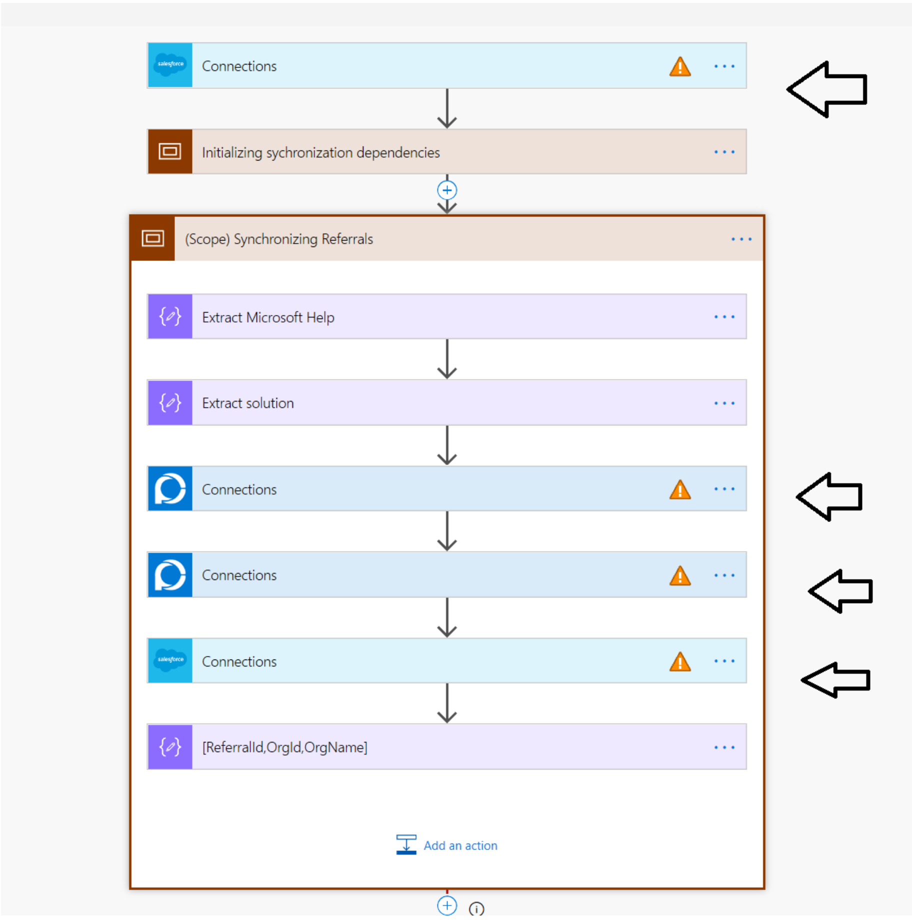
Please ensure whether the following roles exist for the partner user persona:

- Referral Administrator role for Partner Center seller
- “System Administrator” or “System Customizer” role on your CRM instance
- Ensure that the Power Automate flow account user logs into http://flow.microsoft.com at least once beforehand

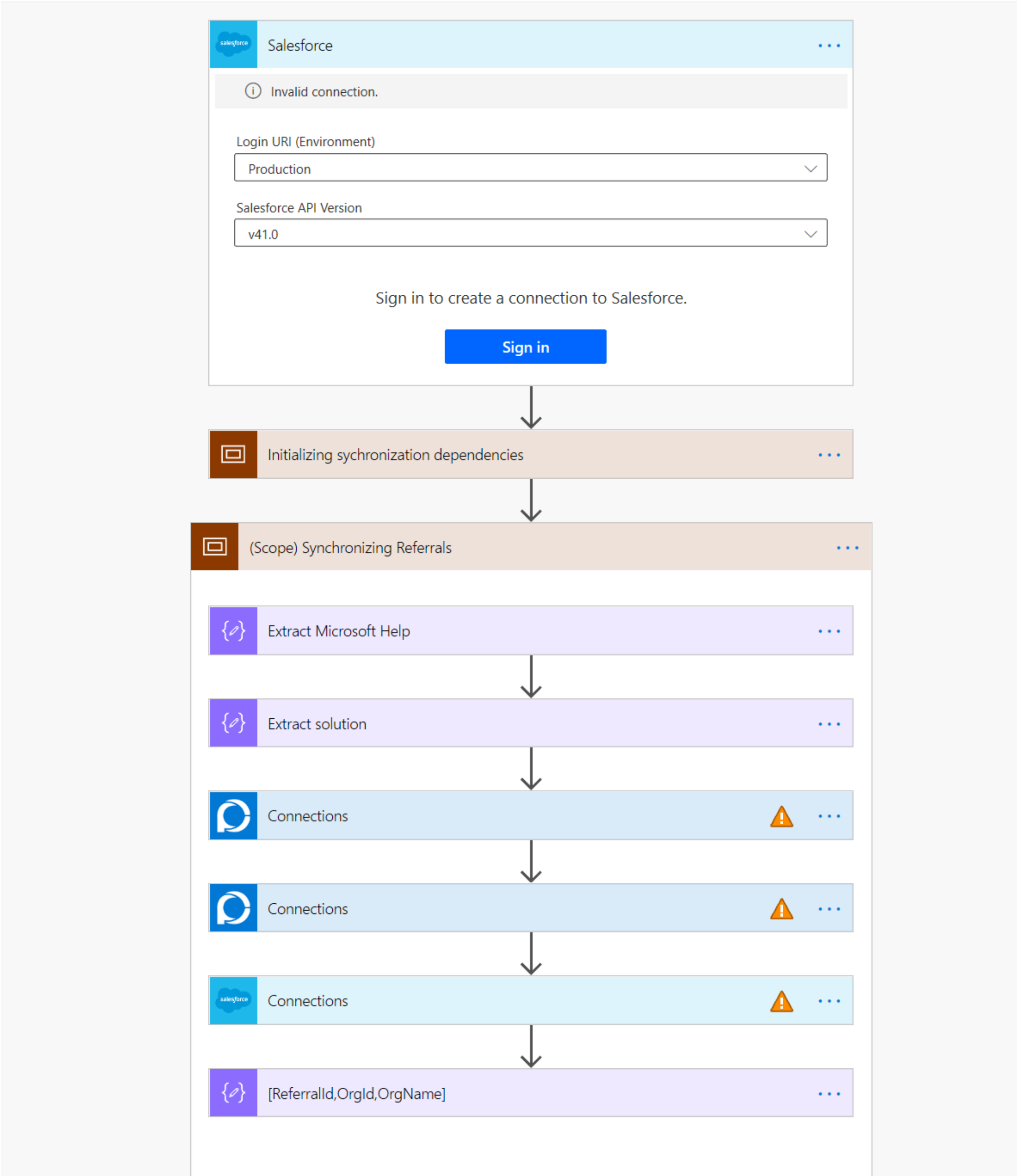
11. What should you do when you are not able to add connections to the flow when you try to edit the flow?

Connections need to be added to the flow as during the flow runs, Partner Center referral admin and Salesforce persona are impersonated. Hence you would need to add connections to each of the flows. In case, the dialog to add connections don't open up automatically while editing the flow, then you can edit each of the steps and sub-steps of the flows to add the connections.

- Select each of the flow and edit the flow
- Expand all the steps in the flow and select the steps where you see a warning icon asking to associate connections, e.g.



- Click on the steps and add connections to each of the steps in the flow



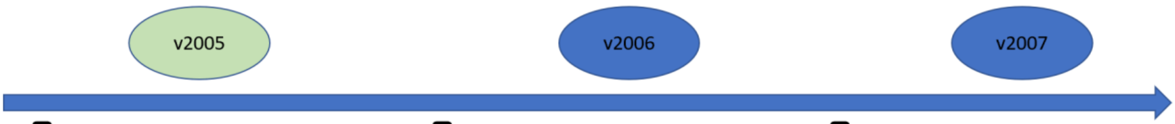
13. Limitations

1. Based on the partner's operating regions, currencies should apriori exist in your CRM environment.
2. Partner sales team should apriori exist in your CRM environment as CRM users.
3. Partner sellers should provide estimated revenue and closing date when qualifying a lead to an opportunity.

4. If a referral were earlier not synchronized to Salesforce and later in Microsoft Partner Center the referral was marked as "Won" or "Lost", then the referral won't synchronize in Salesforce.
5. When an opportunity is shared by Microsoft Seller to the partner, the partner must either accept or decline the opportunity first and then close the opportunity as "Won" or "Lost". On Salesforce, the on-hold opportunities should not be directly closed.
6. When a seller inbound opportunity is closed as "Lost" on the Partner Center, then the customer email field is not populated on Salesforce CRM.

14.Features Cadence

The first version of connectors solution for Salesforce is available now. We would have two subsequent releases of the solution with support for new scenarios and features. Below is a ***target*** list of scenarios and features that would be available over the releases.



1. Bi-direction sync of Co-sell referrals between Microsoft and Partner CRM.
2. Support for IP and Services Co-sell.
3. Co-sell lifecycle support for sending/receiving deals to/from Microsoft, Accept/Reject deals, Mark deal as Won/Lost and Update deals meta data.
4. Intuitive 'card view' in CRM that allows partner sellers to easily select Opportunities to sync with Microsoft as well as to update fields.

1. Support for deal sharing i.e. sharing a deal without Microsoft seller help.
2. Co-sell Microsoft products aka 'Transact' role.
3. Ability to mark a deal as 'Private' thereby limiting visibility to MS sellers for these deals.
4. Support for Campaign ID tagging of the deals.
5. Support for selecting multiple-solutions in a single deal.

1. Allow MS Sellers to invite in on a shared deal.
2. Support for sales stage data update on deals.

15.Reference Links

Please refer to the below mentioned additional links for more information

Topic	Links
How do referrals work in Partner Center?	• Partner Center Referrals
How would you know more about Co-selling opportunity?	• Understanding Co-sell • Microsoft blog on Co-sell • Best practices to manage Co-sell

Partner Center webhook events are resource change events delivered in the form of HTTP POSTs to a registered URL.	• Partner Center Webhook Events
How would you understand more about Microsoft Power Automate platform?	• Microsoft Power Automate Platform
How would you create Partner Center user accounts and associate permissions?	• Partner Center user accounts
How do you create Power Automate flows in Microsoft Power Automate?	• Create flows in Microsoft Power Automate
How would you troubleshoot in case of failures during Power Automate flow execution?	• Troubleshoot flow failures
How would you understand more about leads, accounts, and contacts in Salesforce	• Overview of Leads, Account and Contacts in Salesforce • Salesforce Opportunities Part 1 - Overview and Key Fields