ISV Partner Getting Started Guide

Build

November 2021

Introduction

Introduction

The following Getting Started Guide is designed to walk ISVs new to the Dynamics 365 platform through the necessary steps to get started building standalone business applications on the Common Data Model using the Power Platform.

This guide is broken down into five sections:

Becoming a Microsoft partner
First, it outlines the process to become a Microsoft partner, including registering for the Microsoft Partner Network (MPN) and Partner Center (PC). If you are already a Microsoft partner with PC access, you can skip this section.

Understanding the Power Platform
The second section takes a look at the Power Platform to provide context and clarity around the structure and available tools.

How to build
The third section walks through how to build a standalone app on the Microsoft Dataverse using the Power Platform.

Package and publish
The fourth section walks through the steps to package and publish your application for sale on AppSource, including information on Microsoft's Go-To-Market Services.

Resources
Lastly, we've included links to additional resources to help you find answers to questions and provide additional guidance for when you're ready to move beyond the basics.

Let's first take a look at the three programming models and define what Build means.

If you are already a Microsoft Partner with Partner Center access, you can skip this section.

Introduction

Programming models

While our Business Applications Platform is made up of best of breed applications—including Finance and Operations, Customer Engagement, Office 365, and LinkedIn—the true power of the platform is in how it all works together through our Microsoft Dataverse.
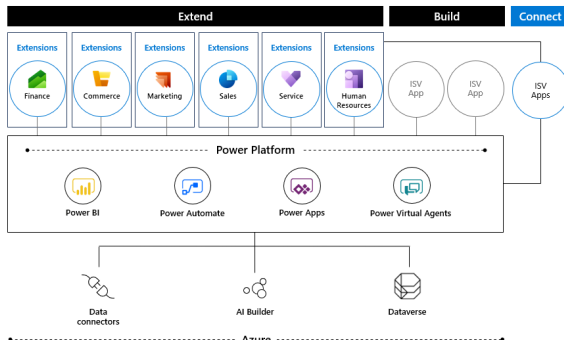
The Microsoft Dataverse is the shared data language used by business and analytical applications. It consists of a set of a standardized, extensible data schemas published by Microsoft and our partners that enables consistency of data and its meaning across applications and business processes.

This means that when you're interacting with your data—whether reading or writing—you are doing so from a common data source. There is no more tying together disparate systems and retrofitting data connections. It all works seamlessly through the Microsoft Dataverse.

This model unlocks three key opportunities for ISVs who wish to leverage our Business Applications Platform for their business: Build, Extend, and Connect.

Build
Build standalone apps on the Microsoft Dataverse

ISVs can build standalone business apps directly on the Microsoft Dataverse using the Power Platform (i.e., PowerApps, Power BI, and Power Automate).
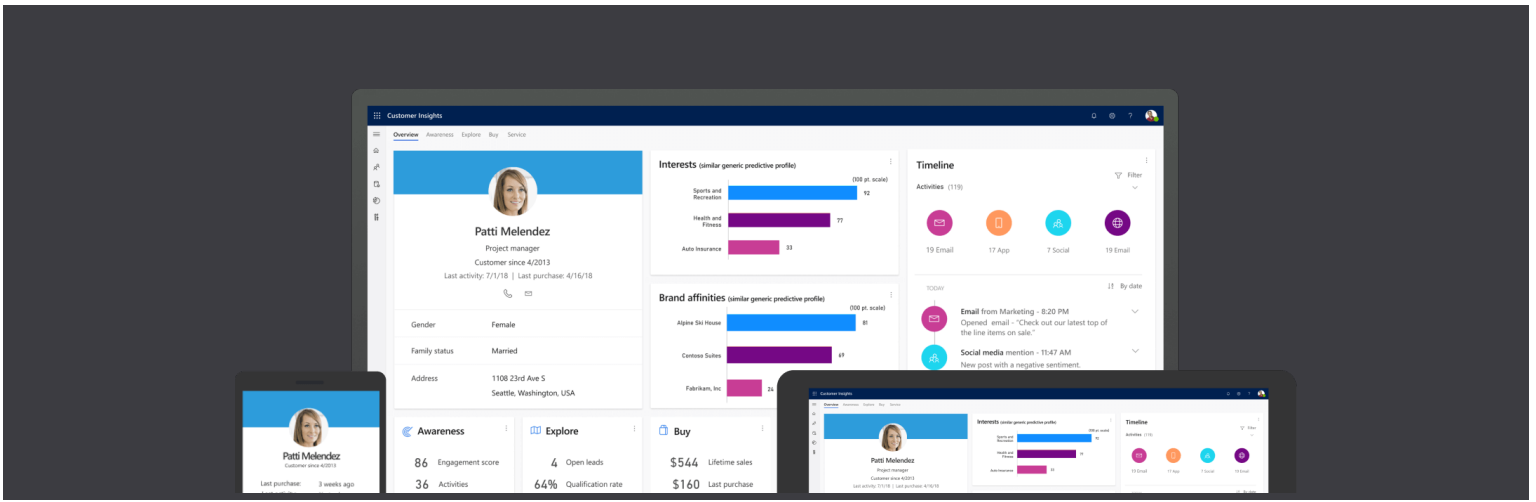
Extend
Extend the functionality of Dynamics 365 business applications

ISVs can extend the functionality of a Dynamics 365 business applications, such as Dynamics 365 for Sales and Dynamics 365 for Finance and Operations. Extend scenarios include creating industry or vertical customizations to our first-party apps.

Connect
Connect to first-party apps from external apps

ISVs can connect their external solutions to first-party Dynamics 365 apps or the Power Platform.

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Prerequisites

Sign up for Power Platform

- Register for a PowerApps account

Step 1
Become a Microsoft partner

- Create a Microsoft work account

- Join the Microsoft Partner Network

- Set up your Partner Center account

Step 2
Register as a publisher

- Register in Partner Center

If you are already a Microsoft Partner with Partner Center access, you can skip this section.

Prerequisites

Prerequisites

Before you publish, market, and sell your first apps, there are a few steps you must take to get set up as a Microsoft Partner. These include joining the Microsoft Partner Network (MPN) and getting registered in the programs that enable you to publish, market, and sell your apps.

Sign up for Power Platform

Register for a Power Platform account

To begin building PowerApps, you must set up an account. You can try Power-Apps for free by signing up either for a 30-day trial or community plan.

POWERAPPS SIGN-UP >

1   Become a partner

Becoming a Microsoft partner gives you access to the Microsoft resources needed to build, market, and sell your apps. While you don't need to be a Microsoft partner to begin developing your apps, all of the steps below are required to gain access to the programs that enable you to publish, market, and sell your apps.

Create a Microsoft work account

Before you begin, you must create a Microsoft work account. The same account should be used as you sign up for subsequent programs to ensure all of your privileges are centralized under a single account ID. You can register your email here.

> If you have an active subscription to Microsoft Azure or Office 365, you already have a Microsoft work account.

Join the Microsoft Partner Network

Becoming a Microsoft partner gives you access to all the resources you need to build and publish apps. To become a partner, you must join the Microsoft Partner Network (MPN), at which time you will be assigned an MPN ID. MPN membership is free to all partners; you can enroll in the MPN here.

ENROLL IN MPN >

Sign in for an enhanced partner experience

Sign in to Microsoft Partner Network (MPN) for a more personalized experience. Not a partner yet? Find out where partnership with Microsoft can take you.

Sign in now >   Join MPN today >

Prerequisites

Set up your Partner Center account
Once you have joined the Microsoft Partner Network (MPN), you can <u>set up your Partner Center (PC) account</u>. Your PC account provides you with access to pricing information, tools and services, and enables you to manage admin credentials for <u>your company's work account</u>. PC is also where you can purchase or renew subscriptions to Microsoft Action Packs, create a business profile to receive and manage sales leads from Microsoft, and see if you qualify for co-selling opportunities.

Learn how to manage your Partner Center account.

DOCUMENTATION >

2 Register as a publisher

Registering as a publisher allows you to sell your solutions on AppSource, the marketplace that gives ISVs access to more than 100 million commercial users.

Register in Partner Center
The first step to becoming a publisher is to register in Partner Center (PC). PC is where you submit your apps for publication, promote your apps, and manage your offers.

To begin the registration process, you must complete <u>these steps</u>. Shortly thereafter, one of our team members will follow up to help you complete your registration.

Once registered, you can access PC.

Understanding the Power Platform

Parts of the Power Platform
- PowerApps
- Power Automate
- Power BI
- Power Virtual Agents
- AI Builder
- PowerApps portals

Microsoft Dataverse

Model-driven apps vs. Canvas apps
- Model-driven apps
- Canvas apps

Ways to build PowerApps
- Check out some sample apps
- Create an app from a template
- Use shared apps
- Create an app from a data source
- Build from the ground up

Understanding the Power Platform

Parts of the Power Platform

Power Platform enables business to create custom solutions—from simple to complex—through familiar, intuitive technology. Power Platform enables faster data collection, surfaces real-time insights, and empowers users to make informed, actionable decisions. It also enables users to do three key actions on data that help them drive business: gain insights from data (Analyze), drive intelligent business processes (Act) via apps they build, and automate the processes (Automate). Analyze, Act, and Automate — all done with Microsoft Dataverse, Power BI, PowerApps, and Power Automate, all working together atop data to help everyone.

Microsoft Power Platform is comprised of four products: Power Apps, Power Automate, Power BI, and Power Virtual Agents. It also has two add-ons: AI Builder and Power Apps portals—designed to help you build, extend, and connect apps for Dynamics 365 and Office 365.
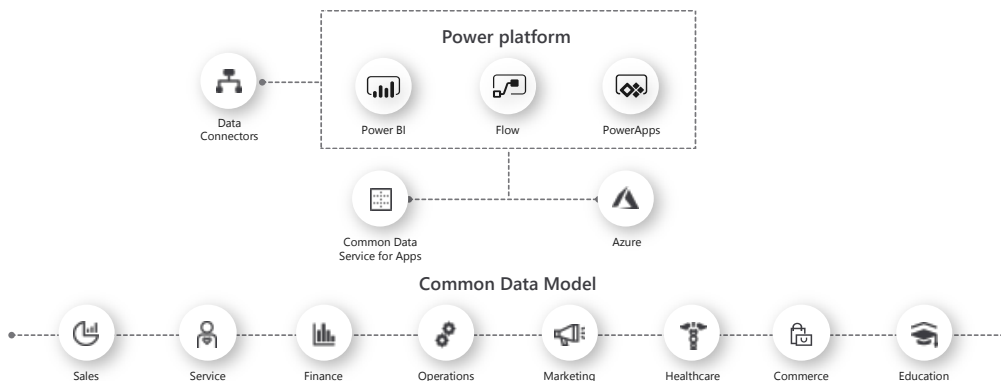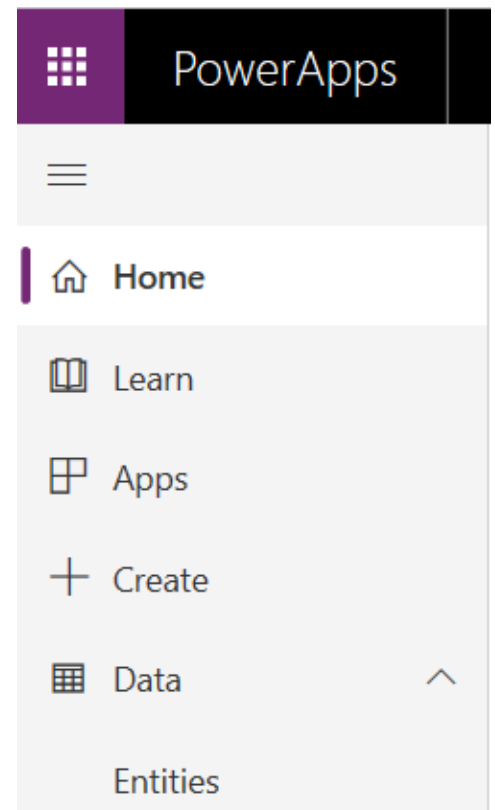

PowerApps

PowerApps

PowerApps sits at the center of the Power Platform. PowerApps is a collection of services, apps, and connectors that work together to let you build applications, ranging from simple no-code mobile apps used to view and update your data to fully featured software that extends the functionality of our Dynamics 365 solutions. With PowerApps, you do much more than just view your data. You can act on your data and update it anywhere and from any device. Sign up for a free trial version and sign in and explore samples and templates.

Building blocks
To create, share, and administer apps, you'll use these sites:

1. **make.powerapps.com:** In the web portal, you can open apps, specify the type of app that you want to create, and create data connections and Power Automates. To use this site, you'll need to log in using your organizational account.
2. **PowerApps Studio**: Using PowerApps Studio, you can build apps by configuring user interface (UI) elements and using Excel-like formulas.

Understanding the Power Platform

3. **PowerApps Mobile**: With PowerApps Mobile, you can run your apps on Microsoft Windows, Apple iOS, and Google Android devices.
4. **PowerApps admin center**: In the admin center, you can define environments and data policies.

Related technologies, platforms, and data sources

Microsoft PowerApps works with other technologies, platforms, and data sources to help you build and share apps across your organization. Let's take a look at some of these:

- **Microsoft Dynamics 365**: Dynamics 365 is the home for all your business apps, including Dynamics 365 for Sales, Dynamics 365 for Finance and Operations, Dynamics 365 for Field Service, and many others.
- **Microsoft AppSource**: AppSource is the marketplace through which you share your apps and download other apps that might be useful to your business.
- **Data sources**: Data sources bring cloud and on-premises data into your apps. You access data through built-in connections, custom connectors, and gateways.

Power Automate

Power Automate

With Power Automate, users can connect to more than 200 services to create automated, multi-step workPower Automates, as well as easily create custom connections when needed. Once built in Power Automate, these workPower Automates and connections can be leveraged to extend the functionality of your PowerApps solution. Sign in here and explore templates. Windows 10 users can streamline productivity and easily automate work with low-code personal automation using Robotic Process Automation (RPA) in Power Automate Desktop at no additional cost.

Power BI

Power BI

Power BI enables users to build sophisticated, visual dashboards from their data. As part of the Power Platform, Power BI dashboards components can easily be embedded into PowerApps solution, and PowerApps components can be embedded into Power BI dashboards. Sign in here and explore templates.

Learn how to develop custom connectors.

DOCUMENTATION >

Power Virtual Agents

Power Virtual Agents improves the authoring experience with list variables, topic suggestions from bot sessions, adaptive cards, and more. Also included is Power Automate integration with better error handling and new topic trigger management in order to improve your bot's triggering capabilities.

Understanding the Power Platform

AI Builder
This add-on introduces AI functionalities in preview as well as form processing improvements. Capabilities include region availability and signature detection in form processing to detect if a signature is present at a specific location in a document.

Power Apps portals
Allows you to create external-facing websites that allow users outside their organizations to sign in with a wide variety of identities, create and view data in Microsoft Dataverse, or even browse content anonymously.

Microsoft Dataverse
Microsoft's Business Applications—including Dynamics 365, Office 365, and Power Platform—are all built on top of our Microsoft Dataverse. Dual-write provides near-real-time interaction between customer engagement apps and Finance and Operations apps. Microsoft Dataverse for Apps lets you securely store and manage data used by business applications. Data within Microsoft Dataverse is stored within a set of records called entities. An entity is a set of records used to store data, similar to how a table stores data within a database.

Microsoft Dataverse includes a base set of standard entities that support common business scenarios that connect to Dynamics 365 application data. You can also create custom entities specific to your organization and populate them with data that you import from lists in SharePoint, Excel, or PowerQuery. App makers can then use PowerApps to build rich applications using this data.

Learn more abut the Common Data Model (CDM).

DOCUMENTATION >

Dynamics 365 applications, including Dynamics 365 for Sales, Field Service, and Customer Service use Microsoft Dataverse for Apps to store and secure data used by the applications. This means you can build apps using PowerApps and Microsoft Dataverse for Apps directly against your core business data already used within Dynamics 365 without the need for manual integration. Dynamics 365 for Finance and Operations and Dynamics 365 for Retail currently require configuration of the Data Integrator to make your business data available within Microsoft Dataverse for Apps.

Model-driven apps vs. Canvas apps
There are two types of apps you can build within PowerApps: Model-driven apps and Canvas apps.

Model-driven apps
Model-driven app design is an approach that focuses on adding dashboards, forms, views, and charts to your apps. With little to no code, you can build apps, ranging from simple to very complex solutions.

Understanding the Power Platform

Canvas apps

Canvas apps allow users to design and build business apps without writing code in a traditional programming language. The app can be designed by dragging and dropping elements onto a canvas, just as you would design a slide in PowerPoint. Excel-like expressions can be used for specifying logic and working with data, and apps can integrate business data from a wide variety of Microsoft and third-party sources.

In canvas apps, the designer has total control over the app layout. In model-driven apps, on the other hand, much of the layout is determined by the components you add. The emphasis is more on quickly viewing your business data and making decisions than on intricate app design.

Ways to build PowerApps

There are several different ways you can create an app, including from a sample app, a template, a shared app, or a data source.
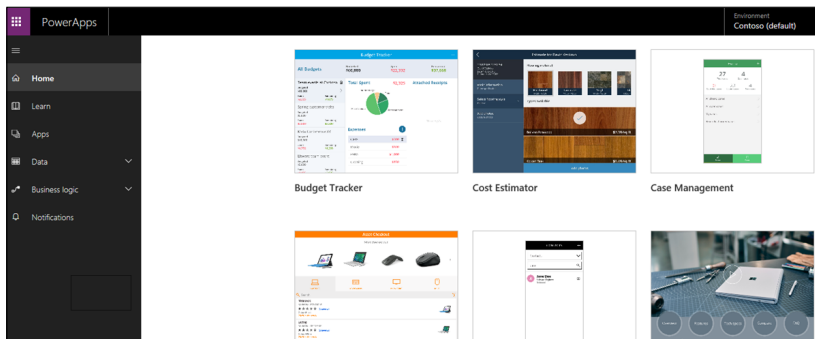

Check out some sample apps

In PowerApps, you'll be greeted with several sample apps that you can use in your web browser. Explore these apps to quickly get a sense of what's possible and how PowerApps can help your business. These samples also contain sample data to inspire your thinking.

Create an app from a template

Another good way to create an app is to start from a template. Templates use sample data to help you get a sense of what's possible. By opening them in PowerApps Studio, you can learn how an app is built through hands-on experience.

Use shared apps

If your team has started to use PowerApps, others might have shared apps with you already. If the app maker has permitted you to edit the app, it will appear on web.powerapps.com, where you can open, customize, and share the app.

App templates

Get a jumpstart with predesigned templates.

Phone layout

Tablet layout
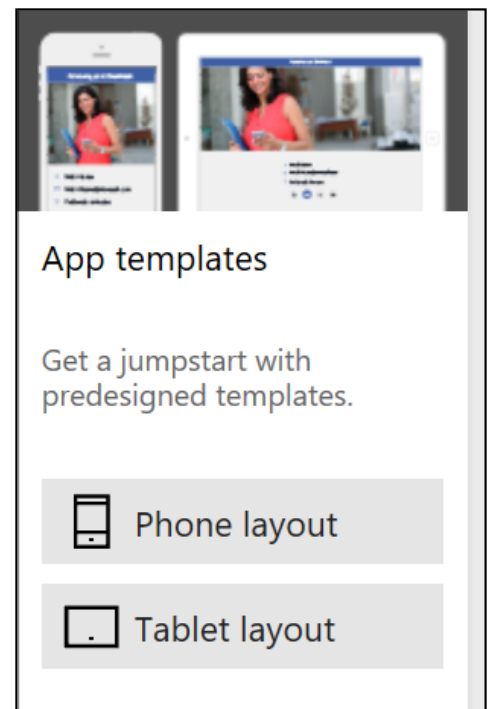
Understanding the Power Platform

Create an app from a data source

A great way to get started is to generate an app from your own data. Just point PowerApps at the data source of your choice, and watch as PowerApps automatically builds a three-screen app. Data sources may include Microsoft Dataverse, SharePoint, and Excel.
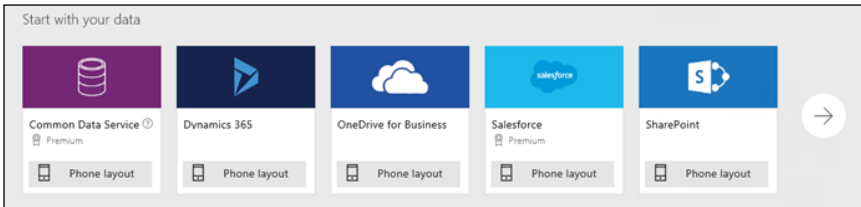
Build from the ground up

You can also build an app from scratch and add all the pieces as you go. Just specify an entity, add a screen, and customize. You can branch out from there and let your imagination run wild.

The easiest way to learn about PowerApps is to start with a sample app, open a template, or connect to your data source and have PowerApps generate the app for you.
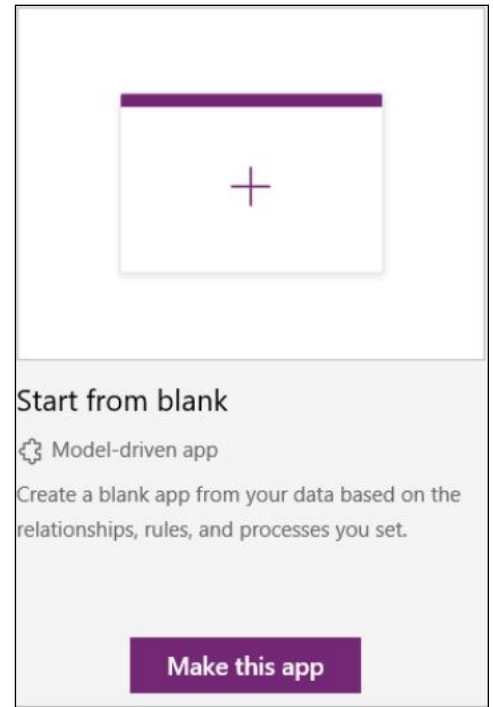
Building your application

Create a canvas app

- Create a canvas app
- Create accessible canvas apps
- Install the app on your device
- Customize your app
- Use solution checker to fix errors and make accessible apps
- Sharing canvas apps
- Manage a canvas app

Create a model-driven app

- Building blocks of model-driven apps
- Design phases
- Create your model-driven app
- Customize your app
- Sharing model-driven apps
- Managing the properties of a model-driven app

Do more with Power BI and Power Automate

- Power BI
- Power Automate

Building your application

Create a canvas app

Create a canvas app
1. Connect to a data source

1. Go to PowerApps and sign in with your organizational account.

2. In the left pane, select **Apps**.

3. Select **Create an app**.

4. Select your **data source**.

5. Under Connections, select **OneDrive for Business**.

6. Select **Create** and choose your **data source**.

7. Select **Connect**.

PowerApps generates the app by inspecting your data and matching it with PowerApps capabilities so that you get a working app as a starting point.

2. Explore the generated app

Your new three-screen app opens in PowerApps Studio. On the left, you'll see the Screens pane. In the upper-right corner of the screens pane, select the thumbnail view. Select the thumbnail for each screen to view the controls on that screen.

Here is the main development window for PowerApps Studio. Select Play in the upper-right corner to try out the app. You'll see that it includes all the data from the list and provides a good default experience.

All apps generated from data have the same set of screens that you can view from the Thumbnail pane:

- **Browse screen**: This screen appears by default. In it, you can browse, sort, filter, and refresh the data from the data source. In the browse screen, you add items to the data source by selecting the plus sign (+).

- **Details screen**: Select an item in the browse screen to open the details screen, which shows all details about an item. In this screen, you can open an item for editing or delete it.

- **Edit/create screen**: In this screen, you can edit an existing item or create one.

> Generated apps are always based on a single list or table, but you can add more data to the app later.

Create accessible canvas apps
To create accessible canvas apps in PowerApps, use the Accessibility Checker to review potential accessibility issues in your app.

Building your application
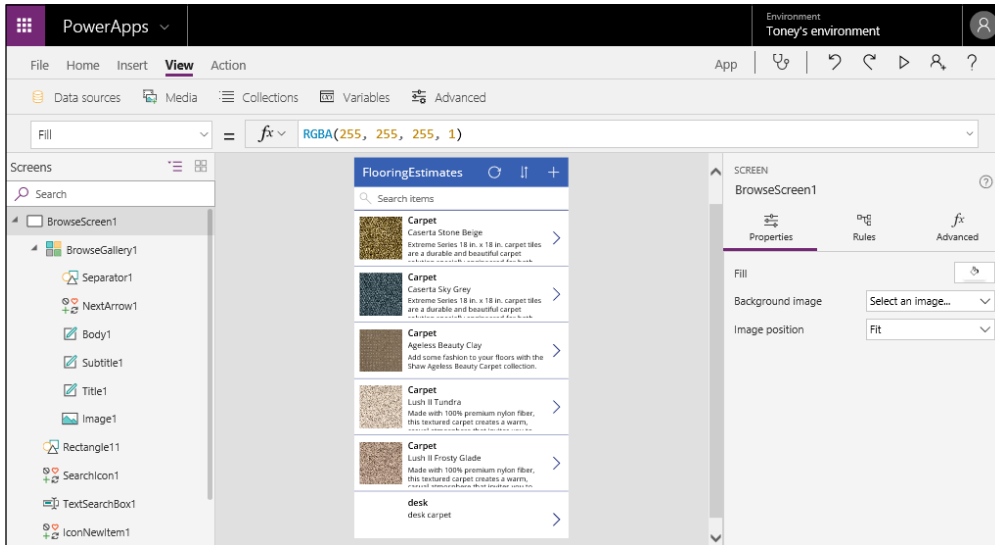
Install the app on your device
You'll want to install your app on your phone to see how it looks there.

1. Download PowerApps Mobile from the app store for the platform that you want to use.

2. Sign in by using your user name and password.

3. On your phone or tablet, run your app in PowerApps Mobile. Otherwise, run the app in a browser.

Customize your app
With the foundation of your canvas app established, you can customize your app's functionality and design.

- Customize a gallery
- Customize a form
- Customize a card
- Configure an app control
- Configure app functionality

Use solution checker to fix errors and make accessible apps
The solution checker helps provide a clear list of formula issues in your app and items to fix to make your app accessible. The PowerApps team is continuing to invest in and build on solution checker in order to help make debugging, performance and best practice decisions an easier and more guided experience.

Building your application

Sharing canvas apps

After you build a canvas app that addresses a business need, you'll want to share your app. First, specify which users in your organization can run the app and which can modify and even re-share it. Then, specify each user by name or specify a security group in Azure Active Directory. If everyone would benefit from your app, specify that your entire organization can run it.

Manage a canvas app

You can edit any canvas app that you built, that you own, or for which you have "Can edit" permissions in PowerApps Studio. If you try to edit an app that's open for editing elsewhere, a message tells you whether you already have it open or another user does. You can <u>edit</u> or <u>delete an app</u>, <u>restore a previous version</u>, <u>change app name and title</u>, or <u>change the screen size and orientation</u>.

Create a model-driven app

Building blocks of model-driven apps

A model-driven app consists of several components that you select by using the App Designer. The components and component properties become the metadata.

- **Data**: The data components determine what data the app will be based upon.

- **User interface**: The user interface components determine how users will interact with the app.

- **Logic**: The logic components determine what business processes, rules, and automation the app will have. PowerApps makers use a designer that's specific to the type of process or rule.

- **Visualization**: The visualization components determine what type of data and reporting the app will show.

- **Advanced model-driven apps**: Solution Explorer is used to make advanced model-driven apps. By using the navigation pane on the left side of the tool, you can navigate a hierarchy that consists of all app components.

Design phases

1. Model your business data

Model-driven design uses metadata-driven architecture so that designers can customize apps without writing code. To model business data, you determine what data the app will need and how that data will relate to other data. Metadata means *data about data*, and it defines the structure of the data stored in Microsoft Dataverse for Apps.

Building your application

2. Define your business processes

Defining and enforcing consistent business processes is a key aspect of model-driven app design. Consistent processes help ensure that your app users can focus on their work and not worry about having to remember to perform a set of manual steps. Processes can be simple or complex, and they often change over time.

3. Build the app

After modeling data and defining processes, you build your app by selecting and setting up the components you need in the App Designer.
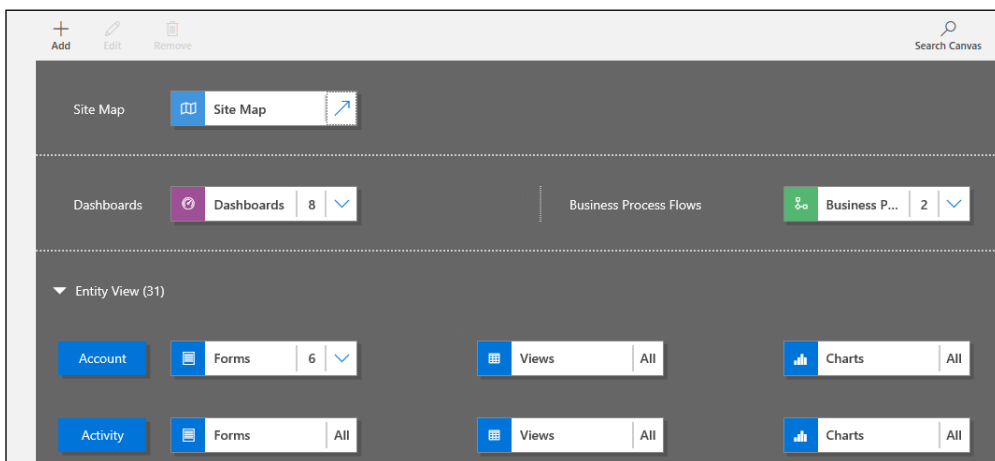
Create your model-driven app
Create a model-driven app by using one of the standard entities that are available in your PowerApps environment.

1. Create a model-driven app

1. Sign in to PowerApps by using your organizational account.

2. Select the environment you want or go to the PowerApps admin center to create a new one.

3. On the **Home** page, select the **Start from blank** option for a model-driven app.*

4. In the left pane, select **Apps**, then select **Create an app**.

5. On the **Create a New App** page, enter a name and description for the app.

6. Select **Done**. Your new app appears in the App Designer, and you can now add components to it.

> *If the model-driven design mode isn't available, you might need to create an environment.

Building your application

2. Add components to your app

You add components to your app by using the App Designer.

1. Select the **Open the Site Map Designer** arrow to open the site map designer.
2. In the site map designer, select **New Subarea**, and then, in the right pane on the **Properties** tab, select the following properties:
   • **Type**: *Entity*
   • **Entity**: *Account*
3. Select **Save And Close**.
4. In the App Designer, select **Forms**, and then, in the right pane under **Main Forms**, select the **Account** form.
5. In the App Designer, select **Views**, then select the following properties:
   • Active Accounts
   • All Accounts
   • My Active Accounts
6. In the App Designer, select **Charts**, then select the **Accounts by Industry** chart.
7. On the App Designer toolbar, select **Save**.

3. Publish your app

On the App Designer toolbar, select Publish. After you publish the app, it's ready for you to run or share with others.

Customize your apps

You can tailor a model-driven app to more closely fit your organization's industry, nomenclature, and unique business processes. You can implement many customizations without writing any code.
• Create an app using the app designer
• Create and design forms
• Create or edit views
• Create or edit a system chart
• Create or edit dashboards
• Add security roles
• Add business logic

Sharing model-driven apps

PowerApps solutions use role-based security for sharing. To share a model-driven app, you must create a custom security role, assign users to the custom security role, and assign the security role to an app. Then you can share the app.

Building your application

Managing the properties of a model-driven app
App properties define important details about the app, like its title or URL. You define app properties when you create an app. You can change and manage those properties in the app designer.

Properties include: Name, Description, Icon, Unique Name, App welcome page, and Enable Mobile Offline.

Do more with Power BI and Power Automate
Power BI
Browse the Power BI documentation to learn more about building powerful dashboards and beautiful data visualizations.

Power Automate
Browse the Power Automate documentation to learn more about building connectors and automating workstreams.

Package and publish your solution

Step 1
Create a managed solution package
- Export solution to Package Deployer
- Create a package using Package Deployer
- Upload package to Azure

Step 2
Validate your code
- QA your code
- Validate your PowerApp

Step 3
Create a new offer
- Create a new offer in Partner Center

Step 4
Submit for publication
- Click Publish to submit your app for approval
- Steps to publish

Step 5
Publish your solution
- View and publish your solution
- Monitor performance and collect leads

Step 6
Market and sell
- Leverage Microsoft support to market and sell your app
- ISV Cloud Embed Program

Package and publish your solution

Publish your PowerApp to AppSource

Once you've created your application and are ready to share it with the world, there are just a handful of steps you must complete to publish it on AppSource.

Note: For software that operates outside the application, use traditional methods to package and install your application, such as an installer program. If your application consists only of Dynamics 365 solution components, it can be imported directly into Dynamics 365. You won't have to create an installer program. However, if your extensions include a combination of Dynamics 365 solution components and external components, you'll need an installer.

1 Create a managed solution package

There are two types of solutions for Dynamics 365 Customer Engagement: managed and unmanaged. An underlined unmanaged solution is one that is still under development or isn't intended to be distributed; unmanaged solutions can still be edited. Once your unmanaged solution is ready to be distributed, you must export the unmanaged solution as a managed solution. A underlined managed solution is a completed solution—with publishable code—that is intended to be distributed and installed by users.

Export solution to Package Deployer

When you are ready to publish to AppSource, you must create an AppSource Package. Export your unmanaged solution as a managed solution, including customizations and metadata, to the Package Deployer. Dynamics 365 provides you with a Visual Studio template for exporting packages that can be used with the Package Deployer tool.
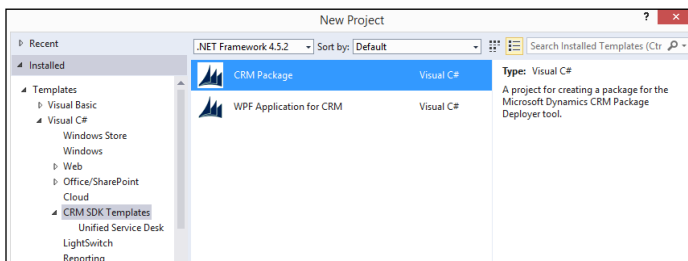
> Both canvas and model-driven apps need to be bundled as a managed solution in order to be published on AppSource.

Package and publish your solution

Create a package using Package Deployer

Using Package Deployer, create a package (.zip) with your assets. The Package Deployer creates a solution package with the structure needed to submit to Microsoft for certification.

Creating a package involves creating a project using the template, adding your files to the project, updating the HTML files, specifying the configuration values for the package, and defining custom code for your package.

An AppSource package consists of:

- **Package file**: A package file used by Package Deployer to deploy your solutions and demo configuration data into multiple languages.
- **[Content_Types].xml**: File that provides MIME type information of the file type extensions included in the AppSource package. Typically, these are .config, .dll, .exe, .xml, and .zip file types, but you can add almost any file type that is supported by Windows.
- **Icon file**: An image file for the AppSource package icon; size should be 32x32 pixels. Valid image formats are PNG and JPG.
- **HTML file**: File containing your License terms.
- **Input.xml**: File that describes the assets in your AppSource package.

Upload package to Azure

Once you have created your solution package, you must upload it to Azure. Before you upload, you should download and install the Microsoft Azure Storage Explorer, which enables you to manage the contents of your Azure storage account easily.

Storage account - blob, file, table, queue
Quickstart tutorial

Package and publish your solution

2 Validate your code

QA your code

Before submitting your code for certification, it is always recommended to thoroughly QA your code, especially in the following areas:
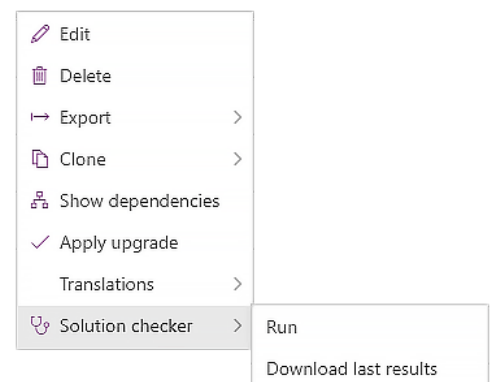
- **Usage**: Improper usage of a particular API, pattern, or configuration.
- **Design**: Design flaws in a customization.
- **Performance**: Customization or pattern that may produce a negative effect on performance in areas such as memory management, CPU utilization, network traffic, or user experience.
- **Security**: Potential vulnerabilities in a customization that could be exploited in a runtime environment.
- **Upgrade Readiness**: Customization or pattern that may increase the risk of having an unsuccessful version upgrade.
- **Online Migration**: Customization or pattern that may increase the risk of having an unsuccessful online migration.
- **Maintainability**: Customization that unnecessarily increases the amount of developer effort required to make changes, the frequency of required changes, or the chance of introducing regressions.
- **Supportability**: Customization or pattern that falls outside the boundaries of published supportability statements, including usage of removed APIs or implementation of forbidden techniques.

Additionally, we recommend that you follow these best practices when building your app, as it can expedite the certification process.

Validate your PowerApp

Leverage the Solution checker feature to perform a rich static analysis check on your solutions against a set of best practice rules and quickly identify these problematic patterns. After the check completes, you receive a detailed report that lists the identified issues, the affected components and code, and links to documentation that describes how to resolve each issue.

1. In PowerApps, select the **Microsoft Dataverse** where you want to enable the Solution checker.
2. On the left navigation pane, select **Solutions**.
3. On the toolbar, select **Solution checker** and then **Install**.
4. Once installed, navigate back to the **Solutions** menu, open the dropdown menu (...), and select **Solution checker > Run**.
5. View the report when the check is complete.

| Edit |
| Delete |
| Export > |
| Clone > |
| Show dependencies |
| Apply upgrade |
| Translations > |
| Solution checker > |

Run
Download last results

Package and publish your solution

3   Create a new offer

Create a new offer in the Partner Center

Once you have resolved any issues identified by the Solution checker, you can move on to creating an offer in the Partner Center (PC).

Each app in AppSource corresponds to an **Offer** in PC. To submit a new app to be published on AppSource, you must create a **New offer** in PC. There are different offer types based on different types of apps. When creating an offer, you will be asked to provide information, including:

- **Offer setup**: Setup details, Lead management, ISV Program.
- **Properties**: Category, industries, version, T&C, market only change.
- **Offer listing**: Name, description, contacts, documents, logos, screenshots, videos, etc.
- **Availability**: Markets, key.
- **Technical configuration**: License model, package URL.
- **Supplemental content**: Functional specification document.

About Test Drive
AppSource supports PowerApps Test Drive solutions as a way for you to share apps with customers and generate leads for your business.

TEST DRIVE >
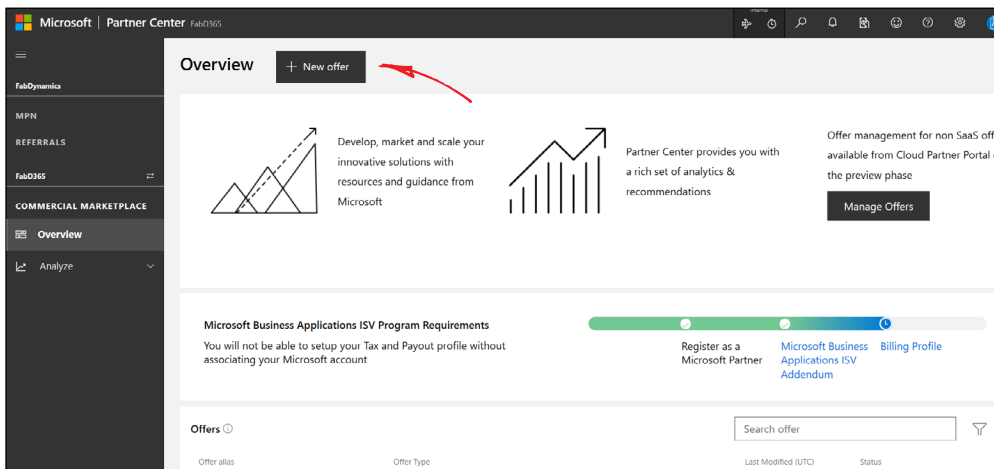
Package and publish your solution

4 Submit for publication

Click Publish to submit your app for approval
Once you have completed filling in the offer details, click **Publish** to begin the publishing approval process. Progress can be tracked on the offer page.

Steps to publish
1. **Automated validation**: This step includes Test Drive data validation (<5 min), Test Drive provisioning (<30 min), and Lead management validation and registration (<15 min).
2. **Certification**: This step leads to manual validation (<2 business days).
3. **Preview creation**: Preview creation (<1 hour).
4. **Publisher sign-off**
5. **Publish**: This step consists of Test Drive data validation (<5 min), Test Drive provisioning (<30 min), Lead management validation and registration (<15 min), and Final publish (<30 min).
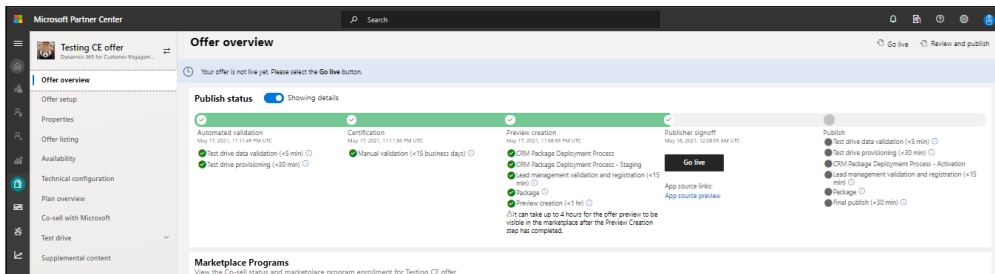
5 Publish your solution

View and publish your solution
Once your app has been approved for publication on AppSource by Microsoft, you will receive a preview link to your offer, where you will be able to view your offer on AppSource and test as if it were live. Once you are ready, you can click on **Go live**, at which time it will become publicly available on AppSource.

Certify/Recertify your application
To complete publishing your app to AppSource, it needs to go through the certification process. Click **Save** and **Publish**.

You need to recertify your apps every 6 months to keep them live on AppSource. Follow the steps below to certify/recertify your application to AppSource.

- For Dynamics 365 Customer Engagement

Package and publish your solution

- For <u>Dynamics 365 for Finance and Operations</u>

For details, see <u>Commercial Marketplace Certification Policies</u>. For certification questions or Marketplace policies, visit <u>Marketplace Publisher Support</u>.

6 Monitor performance

Monitor performance and collect leads
Within Partner Center (PC), under the Commercial Marketplace **Analyze** tab, you can view app performance. You will also receive leads from users who registered for **Test Drive** or **Trial**, requested to be contacted through the **Contact me** form, or opted to share their information by selecting **Get it now**.

ISV Studio
ISV Studio is designed to become the go-to Power Platform destination for Independent Software Vendors (ISVs) to monitor and manage their applications. ISV Studio provides a consolidated cross-tenant view of all the applications ISVs are publishing on AppSource. It helps the ISVs monitor and support their published apps with the help of insights into installation error messages, number of install attempts (Success vs Failures) by tenant name, tenant and instance locations, prod vs sandbox installations, package versions by tenants, etc.

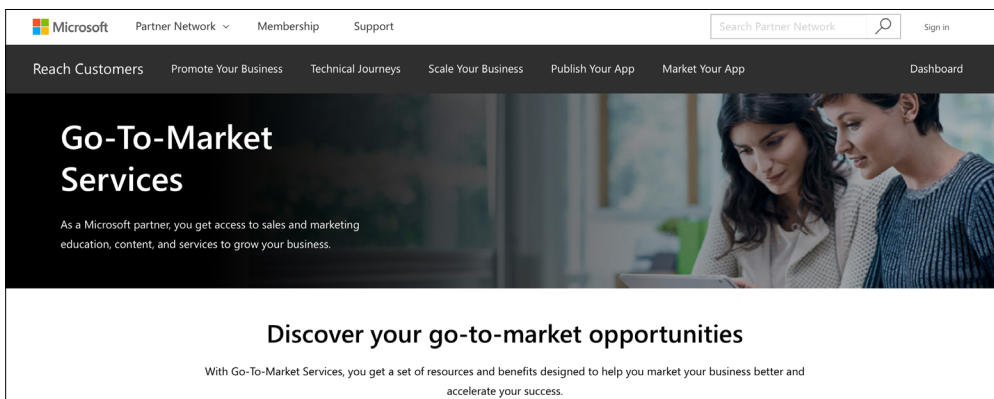**Learn more about our ISV app management.**

APP MANAGEMENT >

7 Market and sell

Leverage Microsoft support to market and sell your app
As soon as your app is published, you can take advantage of Microsoft's Go-To-Market Services, which will help you promote and sell your app. You may also be eligible to participate in other partner programs, such as the IP Co-Sell program.

Learn more about our Go-To-Market Services.

GTM SERVICES >

Go-To-Market Services

As a Microsoft partner, you get access to sales and marketing education, content, and services to grow your business.

Discover your go-to-market opportunities

With Go-To-Market Services, you get a set of resources and benefits designed to help you market your business better and accelerate your success.

Package and publish your solution

ISV Cloud Embed Program

If you have built or intend to build a vertical/industry-focused solution on top of Dynamics 365, or a horizontal solution on PowerApps, and publish on AppSource, the Microsoft ISV Cloud Embed program simplifies app development time, lowers costs, and helps your business grow. The program allows ISV partners to focus on continuous innovation and rapidly build business applications by extending Dynamics 365 applications or building on PowerApps; benefit from a growing community of Office 365 and Dynamics 365 customers through AppSource; receive critical go-to-market support; and delivers increased benefits culminating in co-sell support from one of the world's largest enterprise salesforces.

The requirements for the program are:

1. End-to-end solution built on Dynamics 365 or Power Platform (PowerApps).

2. Solution published on AppSource.

3. Become CSP Direct Bill partner.

It is important to note that you can only sell the Embedded SKUs with your IP as a Unified Solution; you cannot sell the Embedded SKUs separate from your IP, and you will have to give one price point to the entire Unified Solution.

Getting started

Any ISV that builds qualified, finished applications can participate in the ISV Cloud Embed Program at different levels with different benefits based on the partner's preference. To learn more about the program, please review the ISV Cloud Embed Handbook. To become a part of this program and guarantee a rich customer experience, please sign up through this simple online form.

Learn more about the Microsoft ISV Cloud Embed Program.

HANDBOOK >

ISV Cloud Embed sign-up form.

SIGN-UP FORM >

Additional resources

Additional resources

Glossary

Azure: Extensibility platform that allows ISVs to build, test, deploy, and manage applications within Microsoft PowerApps.

Canvas App: Microsoft PowerApps allows you to design and build a business app from a canvas without writing code in a traditional programming language such as C#. Design the app by dragging and dropping elements onto a canvas, just as you would design a slide in PowerPoint. Create Excel-like expressions for specifying logic and working with data. Build apps that integrate business data from a wide variety of Microsoft and third-party sources. Share your app so that users can run it in a browser or on a mobile device and embed your app so that users can run it in SharePoint, Power BI, or Teams. Building from a canvas gives you maximum flexibility over the appearance of the app.

Connectors: The elements that connect PowerApps and APIs.

Common Data Model (CDM): A standardized, modular, and extensible collection of data schemas that Microsoft published to help ISVs and users build, use, and analyze data. This collection of predefined schemas consists of entities, attributes, semantic metadata, and relationships. The CDM simplifies data management and app development by unifying data into a known form and applying structural and semantic consistency across multiple apps and deployments.

Microsoft Dataverse: The Microsoft Dataverse makes it easier to bring your data together and quickly create powerful apps using a compliant and scalable data service and app platform that's integrated into PowerApps.

Power Automate: A business service that allows line of business specialists and IT pros to build automated workPower Automates intuitively.

Model-Driven App: Model-driven app design is an approach that focuses on adding dashboards, forms, views, and charts to your apps. If you don't need a custom design and your data is in Microsoft Dataverse for Apps, you can automatically generate a model-driven app from your business data and processes. This type of app can model forms, views, and other components, and the default UI automatically adjusts to phones, laptops, and other devices. The emphasis is more on quickly viewing your business data and making decisions than on intricate app design.

PowerApps: A SaaS application platform that enables power users in line of business roles to easily build and deploy custom business apps.

Power BI: Self-service business intelligence capabilities, where end users can create reports and dashboards by themselves, without having to depend on IT staff or database administrators.

Additional resources

Additional resources

Best practices and common use cases

Community content: Community apps gallery | Working with data | Design discussion
Real world solutions using PowerApps: Video
UX/UI design tips: Video | UX patterns | Managing fonts and colors
Customize list forms in SharePoint with PowerApps: Blog post | Demo | Documentation
Access web apps migration to PowerApps: Whitepaper
Approval workPower Automates: Blog post | Documentation | Guided learning
Using the on-premises gateway: Overview | Installation and FAQ | Proxy configuration
Build an offline app: Blog post
Creating dialogs in PowerApps: Blog post | Video
Display a map using the Image control: Step-by-step walkthrough | Video
Send an email from your PowerApps app: Video
Connect to Microsoft Cognitive Services: Video
Implement role-based security: Blog post
Build a customized interactive calendar: Step-by-step guide
Notify user that new data is available: Step-by-step guide | Push notifications feature
Deep link into an app using URL parameters: Step-by-step guide
Audit scenario solution: Blog post from community member
Performance considerations when working with PowerApps: Blog post

Learning resources

PowerApps latest feature updates: Blog post | Release notes
Power Automate latest feature updates: Blog post | Release notes
Browse presentations from the Ignite 2018 conference: Blog post with curated links to relevant sessions
Browse Microsoft Business Applications Summit 2018 conference: Blog post with curated list to relevant sessions
Browse How-to videos: PowerApps video gallery | Power Automate Webinars and Videos gallery
Get expert help from partners: Partners
Take up additional Labs Power Platform Labs and Challenges
SharePoint welcomes PowerApps and Power Automate
Customizing SharePoint forms using PowerApps: Ignite presentation
Introduction to Microsoft PowerApps for Access web apps developers

Stay connected

Ways to collaborate with the PowerApps team: Blog post
Stay updated: Product team blog | Webinars
Community sites: Forums | Community blog | Best practices and app gallery
Get support: Blog post | Support page | Submit an idea

Other tools

Microsoft App in a Day Lab
PowerApps and Power Automate Learning Resources

Additional resources

Getting Started Guides
Check out our other Getting Started Guides.

Microsoft Dynamics 365

ISV Partner Getting Started Guide
Extend
August 2019

VIEW GUIDE >

Microsoft Dynamics 365

ISV Partner Getting Started Guide
Connect
August 2019

VIEW GUIDE >

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