Introduction

The following Getting Started Guide is designed to walk ISVs new to the Dynamics 365 platform through the necessary steps to get started extending the functionality of Dynamics 365 business applications.

This guide is broken down into four 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.

**How to extend**
The second section provides an overview of how to extend a first-party app on the Dynamics 365 platform.

**Package and publish**
The third 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 Extend means.
Introduction

Programming models
While our Business Applications Platform is made up of best of breed applications—including Finance and Operations, CRM, Office 365, and LinkedIn—the true power of the platform is in how it all works together through our Common Data Service (CDS).

The CDS 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 CDS.

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 Common Data Service
ISVs can build standalone business apps directly on the CDS using the Power Platform (i.e., PowerApps, Power BI, and Microsoft Flow).

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.

Licensing requirements
Build
PowerApps Plan 2 is the minimum required plan. Refer PowerApps pricing for more details.

Extend
Full PowerApps Plan 2 with a license for the required Dynamics 365 application is needed. Refer PowerApps pricing and PowerApps for Dynamics 365 for more details.

Connect
PowerApps Plan 1 is the minimum required plan. Refer PowerApps pricing for more details.
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Prerequisites

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
- Sign up for the Dynamics Insider Program
- Sign up for Lifecycle Services

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

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.

Obtain your work account

Your work account or work email is the email address provided to you by your company. This email is usually in the format you@yourcompany.com. More information on work accounts can be found here.

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.

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

ENROLL IN MPN
Prerequisites

Set up your Partner Center account
Once you have joined the Microsoft Partner Network (MPN), you can set up your Partner Center (PC) account. Your PC account provides you with access to pricing information, tools and services, and enables you to manage admin credentials for your company’s work account. 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.

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 these steps. Shortly thereafter, one of our team members will follow up to help you complete your registration.

Once registered, you can access PC.
Prerequisites

Sign up for the Dynamics Insider Program
In addition to the above steps, all partners must join the Dynamics Insider Program. Through the Dynamics Insider Program, you can gain access to partner resources, test and validate new features, and provide your valuable feedback.

Finance and Operations only
Sign up for Lifecycle Services
You must sign up for a Lifecycle Services (LCS) account here. LCS is where you will package your solution for deployment and manage your application lifecycle.
Building your application

Step 1
Set up a Dynamics 365 environment

Step 2
Access developer tools

Step 3
Explore the platform
Build your application

There are several ways that you can build apps on the Customer Engagement platform. Below is the standard approach that we recommend ISVs new to the platform explore first.

1 Set up a Dynamics 365 Customer Engagement environment

Before you begin writing code, you first need a development environment. The quickest and least expensive way for partners to begin exploring Dynamics 365 development is with a free trial; however, many partners also use IUR-based environments or purchase their own subscription to use as a sandbox instance to get started.

Try our new Customer Engagement platform.

Trial-based development environment

You can try Dynamics 365 for 30 days through a simple email signup. The trial version of Customer Engagement includes Getting started task guides that provide step-by-step instructions that allow you to view specific scenarios in action. The product is available to explore and contains exercise scenarios, but it cannot be customized. Demo data is included to ease the use of the product and to make the experience more meaningful. A reminder email will be sent 3 days prior to the trial expiration.

To start your trial, visit the sign-up page, and click on the Sign up here link next to the copy that asks if you are using this trial for development purposes.

2 Access developer tools

Download Software Development Kit

Dynamics 365 Customer Engagement Software Development Kits (SDKs) are built to help streamline the development process. All SDK assemblies are available as NuGet packages that you can use directly in your Visual Studio projects. For information about using a NuGet package in Visual Studio, see our quick start guide on how to install and use a package in Visual Studio.
Get developer tools
Developers can leverage a range of Microsoft-developed tools and community resources to support the development of Dynamics 365 Customer Engagement apps.

Explore code samples
In addition to many great tools, Microsoft provides an extensive directory of sample code to help developers explore, learn, and expedite their work. Code samples include:

- **Activities**, such as Send an E-mail Using a Template and Create, Retrieve, Update, and Delete (CRUD) an E-mail Attachment.
- **Administration and security tasks**, such as Assign Security Role to Team and Disable a User.
- **Customer service and scheduling tasks**, such as Book an Appointment and Manage Contracts.
- **Processes, workflows, and dialogs**, such as Create a custom workflow activity and Execute a Workflow.
- **Report tasks**, such as Publish a Report.

Explore the platform
Exploring basic Create, Retrieve, Update, and Delete (CRUD) operations and web services will help you get a feel for the platform and process of building an application.

Create, Retrieve, Update, and Delete operations
Once you select a programming model, you can explore basic CRUD operations. As you are building your app leveraging the Web API, you should make sure that it is correctly handling data. You can use the Web API Basic Operations Sample to reference how to perform basic CRUD and associative operations.

Use Customer Engagement web services
Web services provide APIs that you can use when you write programs for Dynamics 365 Customer Engagement. Microsoft also provides Quick Start samples to help you understand how to compile and run a program that can create, retrieve, and update an account record, as well as prompt to see if you would like to delete the record.
PowerApps build tools for Azure DevOps

Use PowerApps build tools to automate common build and deployment tasks related to PowerApps. This includes synchronization of solution metadata (a.k.a. solutions) between development environments and source control, generating build artifacts, deploying to downstream environments, provisioning or deprovisioning of environments, and the ability to perform static analysis checks against your solution using the PowerApps checker service.

What are PowerApps build tools?
The PowerApps build tools are a collection of PowerApps specific Azure DevOps build tasks that eliminate the need to manually download custom tooling and scripts to manage the Application Lifecycle of PowerApps. The tasks can be used individually to perform a simple task, such as importing a solution into a downstream environment, or used together in a pipeline to orchestrate a scenario, such as Generate Build Artifact, Deploy to Test, or Harvest Maker Changes.

Get the PowerApps build tools
The PowerApps build tools can be installed into your Azure DevOps organization from the Azure Marketplace. Once installed, all tasks included in the PowerApps build tools will be available to add into any new or existing pipeline and are easily found by searching for PowerApps.
Build your application
There are several ways that you can build apps on the Finance and Operations platform. Below is the standard approach that we recommend ISVs new to the platform explore first.

1. Set up a Dynamics 365 for Finance and Operations environment

Before you begin writing code, you first need a development environment. The quickest and least expensive way for partners to begin exploring Dynamics 365 for Finance and Operations development is with a free trial; however, many partners also use IUR-based environments or purchase their own subscription to use as a sandbox instance to get started.

**Trial-based development environment**
You can try Dynamics 365 for Finance and Operations for 30 days through a simple email signup. The trial version of Finance and Operations includes Getting started task guides that provide step-by-step instructions that allow you to view specific scenarios in action. The product is available to explore and contains exercise scenarios, but it cannot be customized. Demo data is included to ease the use of the product and to make the experience more meaningful. A reminder email will be sent 3 days prior to the trial expiration.

To start your trial, visit the [sign-up page](#), fill in your details, and **Get Started**.

Start your 30-day trial.
Access developer tools

Microsoft provides an extensive set of tools and tutorials for helping you build your solution.

Tools
Explore the development tools offered for Dynamics 365 for Finance and Operations, including:
- Application Explorer
- Projects
- Element designers
- Element usage
- Models
- Build operations
- Visual Studio code editor
- Developer tools add-ins

Explore the platform

Tutorials
Walk through a sample project for Fleet Management to learn all the aspects of building, modeling, and debugging a solution.
- Introduction to Visual Studio development
- Create a simple data model
- Building and debugging a project
- Version control, meta data search, navigation, and other features
Package and publish your solution

**Customer Engagement**
- Create a managed solution package
- Validate your code
- Create a new offer
- Submit for publication
- Publish your solution
- Market and sell

**Finance and Operations**
- Create a package
- Validate your application
- Create a new offer
- App validation process and approval in PC
- Publish your solution
- Market and sell
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.

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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 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 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.

Packaging for PowerApps and Dynamics 365.

Both canvas and model-driven apps need to be bundled as a managed solution in order to be published on AppSource.
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.
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 code using the On-Demand Code Analysis tool
The Dynamics 365 Customer Engagement On-Demand Code Analysis tool provides the same analysis that Microsoft provides after the app is submitted for certification, including errors and warnings. While this is not a required step, it is strongly recommended as it can expedite the certification process.

The On-Demand Code Analysis tool can be located [here](#). The tool is currently available to existing publishers through the Dynamics Insider Program.
Steps to sign up for the On-Demand Code Analysis Tool

1. Launch Dynamics Insider Portal.
   • Sign up to become a member of the Dynamics Insider Program if you are new.

2. Search for the program “Dynamics 365 for Customer Engagement - On-Demand Code Analysis.”
   • Click the Join Now button.
   • Complete the survey.

3. You will receive an email invitation with the subject, “Welcome to the ISV Community portal.”

4. Open the email invitation and click, On-Demand Code Analysis.

5. You will be taken here.
   • Log in with your work email account which was used to login to Dynamics Insider Portal.

6. From the landing page, click on On-Demand Code Analysis on the top right corner.

7. Enter the URL of your AppSource solution package in the tool and click Analyze.

8. You will receive a detailed report, including “Code Analysis Summary,” “Severity Breakdown Dashboard,” and “Issue location.”

Create an offer

Create a new offer in Partner Center

Once you have resolved any issues identified by the On-Demand Code Analysis Tool, you can move on to creating an offer in 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 your 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.

Offer type

- Offer app for free
- Offer app with free trial
- Offer app with contact me button (with Test Drive)
- Offer app with Trial and Test Drive

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.
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 to certify/recertify your application to AppSource.

Here are a few criteria to get your apps recertified:
• Check and verify if your app is on the latest Dynamics 365 version.
• Check if the Dynamics 365 environment is utilizing Unified Interface.

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.
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 here.

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.
Build a Lifecycle Services solution package and publish

1 Create a package

Create a new project in Lifecycle Services

Lifecycle Services (LCS) is where you will create, update, and manage your Dynamics 365 for Finance and Operations apps. To get your app published on AppSource, you must first create a new project in Lifecycle Services.

To create a new project, select Migrate, create solutions, and learn. From this dashboard, you will be able to deploy a demo environment in LCS, set up Visual Studio Team Services (VSTS), and package the artifacts needed for your solution.

Assemble asset library

Asset requirements:

- **Code**: Deployable package, Model files, Binaries (optional).
- **Configuration**: Database backup that consists of Master data, Reference data, Transactional data, Data used for demo and presale scenarios.
- **Process Data Packages (PDP)**: Bundled data packages that align with business processes in Business Process Modeler library.
- **Business Processes**: Business Process Modeler (BPM) library generated with custom data utilizing the modeler.
- **Methodology**: Standard methodology is LCS Solutions Consumption. Only the Learn phase is required. Consume and any subsequent phases are optional.
- **Marketing**: Solution description (long and short), Industry specific logos of various sizes (high resolution), Screenshots of custom features, and Lead management.

Extensions must be used instead of overlayering for customization. Please reach out to our team at asops@microsoft.com or explore our online documentation to learn more about migrating from overlayering to extensions.
Create a solution package
From the project dashboard, select **Solution management** to enter the Solutions management workspace. This is where you will bundle your artifacts and create your solution package.

In the Solutions management workspace, click (+) **Create package** to create a package. You will be prompted to provide information about your app, including the name, description, methodology for creating the app, product version, and the industry. Once you create the package, you can assign Solution approvers and assemble the package contents.

Package contents:
- Model
- Software deployable package
- GER configuration (optional)
- Database backup
- Power BI report model (optional)
- BPM artifacts
- Process data package
- Solution License Agreement and Privacy policy

Validate your application

Generate a Customization Analysis Report
The Customization Analysis Report (CAR) is a tool that analyzes your customization and extension models and runs a predefined set of best practice rules. The report is one of the requirements of the solution certification process. The report is in the form of a Microsoft Excel workbook. Learn about CAR and how to generate the report.
Validate app requirements
Microsoft requires specific reviews before validating that the app meets certain requirements. Currently, partners will need to demonstrate that these requirements have been met by doing test deployments and then sharing the results with Microsoft. All apps for Dynamics 365 for Finance and Operations must go through the certification process to verify that the custom codes meet Microsoft guidelines and best practices. Partners must complete the following curation artifacts and tests:

- Code analysis report (CAR)
- Business process modeler (BPM)/test scripts
- Business database backup
- Project name and description
- Data packages
- Methodology*
- Binaries (optional)
- Deployable packages
- Models (code and tests)
- Marketing content

*The only Methodology requirement is the Learn phase.

Publish your offer in Lifecycle Services
Once you have built your Solution package, you can publish it from the Solution Management workspace. You can either publish it to your organization or globally.
Generate a solution identifier
Once you publish your app in LCS, it will automatically generate a solution identifier. This solution identifier is the key that will link the LCS solution package with your Partner Center offer, which we will walk through next.

3 Create a new offer

Create a new offer in Partner Center
Creating an offer in Partner Center (PC) is required for your marketing content. You can create an offer in PC at the same time you create the solution package in LCS.

Each app listed on AppSource corresponds to an Offer in PC. To submit a new app to be published on AppSource, you must create a New offer in the portal. 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.
- **Offer listing**: Name, description, contacts, documents, logos, screenshots, videos, etc.
- **Availability**: Markets, key.
- **Technical configuration**: Solution Identifier, release version.
- **Supplemental content**: Key usage document – CAR.

Link your Solution identifier
Once you’ve created your new offer, you must link it to your Solution package in LCS using the Solution identifier. This is done on the Technical Configuration tab of your offer page, where you’ll find a Solution identifier field. Place the Solution identifier generated in LCS into the respective field in PC.

For Dynamics 365 for Finance and Operations app type, you must select Contact me within the Offer Setup/Setup Details to receive customer inquiries regarding your solution.
4 App validation process and approval in Partner Center

Contact the Dynamics 365 for Finance and Operations team to initiate the review process
Send an email to asops@microsoft.com to initiate the app review process. Our team will schedule an initial meeting to review your LCS project and your Partner Center (PC) offer. A final review will follow for a demo of the solution before approval on PC.

Click Publish to submit your app for approval
Once you have completed the review meetings, you will be directed to publish the offer in PC to get into the approval queue. Click Publish to begin the publishing approval process. Once you’re ready, you can click Go live, at which time, it will become publicly available on AppSource. 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).
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 to certify/recertify your application to AppSource.

Here are a few criteria to get your apps recertified:
• Check and verify if your app is on the latest Dynamics 365 version.
• Check if the Dynamics 365 environment is utilizing Unified Interface.

Monitor performance

Monitor performance and collect leads
Within Partner Center 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.

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 here.

Learn more about our Go-To-Market Services.
Publish and package your solution

Finance and Operations

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.

SIGN-UP FORM
Additional resources
Customer Engagement

While this guide covers the basics of creating, packaging, and publishing your Customer Engagement app, Microsoft has many other resources that ISVs can leverage, some of which are listed below.

General

Questions and additional support
Email: AppSourceCRM@microsoft.com

Managing your Dynamics 365 subscription
Navigate between Office 365 and Dynamics 365 home page

Links for all the modules in Dynamics 365 Customer Engagement Suite
Sales | Customer Service | Marketing | Field Service | Project Service Automation
Portals | Voice of the Customer | LinkedIn Connector
Social Engagement | Gamification | Unified Service Desk

Stay in touch with Dynamics 365 Customer Engagement Community
Dynamics 365 Customer Engagement Team Blog
Microsoft Dynamics CRM Community

Developer-focused

Building reports in Dynamics 365 Customer Engagement Solution
Building reports in Dynamics 365 Customer Engagement Solutions

Data management
Managing data in Customer Engagement

Best practices
Best practices
Finance and Operations
While this guide covers the basics of creating, packaging, and publishing your Finance and Operations app, Microsoft has many other resources that ISVs can leverage, some of which are listed below.

General
Questions and additional support
Email: asops@microsoft.com
External Partner Shared Site [restricted access]

Managing your Dynamics 365 subscription
Lifecycle Services user guide
Implementation lifecycle management for Microsoft Dynamics 365 for Finance and Operations
Software lifecycle policy and cloud releases
ISV Licensing

Developer-focused
Documentation
Publishing guide for Dynamics 365 for Finance and Operations
Development and administration for Finance and Operations
Videos for Finance and Operations
Getting Started Guides
Check out our other Getting Started Guides.
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