FAQ: Using Microsoft Partner Center for ISV Connect

How do I enroll and publish my app?
NOTE: These instructions apply only to existing partners with Microsoft Partner Network (MPN) and Partner Center credentials who are set up for Microsoft’s Commercial Marketplace. New partners need to take additional steps.

View your AppSource offers
1. Go to Partner Center and sign in.
2. Select Dashboard.
3. To view the offers, select Commercial Marketplace from the left sidebar.
4. If you don’t see Commercial Marketplace on the sidebar, select **Add program** in the **Recommended opportunities** section.
5. Enter your work email address and select **Continue**.
6. Enter and review your account information.
7. After you accept the terms and conditions, Commercial Marketplace is listed on the left sidebar on the Partner Center Home page.
8. To see your existing Microsoft AppSource offers, select **Commercial Marketplace** and then **Overview**.

How do I create a new offer?
1. To create a new offer, select the **+ New offer** button at the top of the page.
Select the service category for the type of app you’re creating: either **Dynamics 365 for Customer Engagement & PowerApps** (Dynamics 365 CE) or **Dynamics 365 for operations** (Operations, Finance, Retail). Be sure to select the correct option as the app type can’t be changed later.
2. Enter the required information in the New offer menu:

   a. **Offer type.** This field auto-populates.
   b. **Offer ID.** Enter a unique Offer ID for each offer.
   c. **Offer alias.** Enter a descriptive name for internal Partner Center use. Normally this is the name or title of the application.

3. After you select **Create**, the Offer setup tab in the Offer overview section appears:

   - Enter all the required information in the tabs on the left sidebar.
   - To save your changes, you must select **Save draft**. When you’re in the process of entering and saving this information, your offer’s status is **Draft**.
• To go back to the setup pages in the Offer overview section, go to Commercial Marketplace > Overview and select your offer.

Required information in these tabs on the Offer overview page must be entered.

• Offer setup
• Properties
• Offer listing
• Availability
• Technical configuration
• Co-sell with Microsoft
• Supplemental content

Before submitting your offer at Review and publish, you must accept the Microsoft Business Applications ISV Addendum and set up billing, as shown in the following sections.
How do I accept the Business Applications Addendum?

After you create or start to create a Dynamics 365 Customer Engagement or Operations offer, you can accept the **Microsoft Business Applications ISV Addendum** (agreement). You should accept the agreement before you set up billing.

To view your accepted agreements in Partner Center, take these steps:

1. Go to **Commercial Marketplace > Overview**. Then go to the **Profile** section at the bottom of the page.
2. Accept your agreement by selecting **Update** in the **Status** column.

NOTE:
Only certain user roles can review and accept agreements.

A PDF of the current version of the agreement is also available. For more program see [Innovate with Business Applications](#).

How do I set up billing and deal registration?

Set up your billing profile

1. To enter your billing information, go to the **Settings** page by selecting the gear icon.

2. Select **Developer settings** from the dropdown list.

3. To go to the **Billing profile** page, select **Billing profile** from the **Settings** dropdown list.
As an option, you can also view your billing status in the Profile section at the bottom of the Profile>

<table>
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<th>Status</th>
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<tbody>
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<td>Addendum</td>
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<tr>
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<td><img src="image" alt="Update" /></td>
</tr>
<tr>
<td>Marketing Profile</td>
<td>Update</td>
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Commercial Marketplace > Overview page.

4. Enter the required information and then select **Update**.
5. To revise your billing profile after you set it up, select **Update**.

6. Make your updates in the **Billing profile** fields, and then select **Update**.

7. For help with setting up billing, go to **Help and support**.

   **NOTE:**

   Only certain user roles can add and revise billing data.

**How do I register completed (signed) cosell and non-cosell sales?**

To register completed sales, also called deal registration, you need **Referrals Admin** permissions in **Partner Center**:

- **Cosell** sales are from sales resulting from referrals shared between you and Microsoft.
- **Non-cosell** sales are all other sales. These sales don’t involve joint selling or referral exchange with Microsoft.

To register both types of sales, take these steps:

1. **Sign in** to the **Partner Center dashboard**.
2. **Check your permissions.** If you see the Referrals tab on the left sidebar, then you have access.

How do I find my global admin and get access?
If you don’t have access, ask your global admin to assign you the **Referrals Admin** role.

Find your global admin
If you don’t know who your admin is, take these steps:

1. Sign in to the [Partner Center](#) dashboard with your user ID.
2. Go to the **Settings** menu by selecting the gear icon in the upper-right corner. Then select **Partner settings**.
3. Select **User management**.
4. Select the down arrow next to **All Users**.

5. Select **Global Admin** from the **All Users** dropdown menu.

6. The names and contact information for your company’s global admins display on the **User management** page.

How do I get access from my global admin?
After you get your admin’s contact information, ask them to assign you the permissions you need for Partner Center roles. They can assign you the **Referrals Admin** role by taking these steps:

1. Sign in to Partner Center.
2. Go to the Settings menu by selecting the gear icon in the upper-right corner. Then select Partner settings.

![Settings menu image](image1)

3. Select User management.

![User management image](image2)

4. Select your name from the list.

**User management**

Add, edit, or remove user accounts. Assign permissions.

Export report of users who have access to Partner University or have associated Microsoft Learning account.

<table>
<thead>
<tr>
<th>Name</th>
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<td>User3</td>
<td><a href="mailto:User3@company.com">User3@company.com</a></td>
<td>Remove</td>
</tr>
</tbody>
</table>
5. To assign the **Referrals Admin** role, select the **Referrals admin** checkbox and then select **Update**.

![Roles and permissions](image)

6. If you aren’t an existing user, the admin can add you as a user in the **User management** menu by selecting **Add user**.

![User management](image)
7. On the Add user page, enter the user’s name and email, select checkboxes next to the appropriate roles and permissions, and then select Add.

To learn more about user roles, see Manage your Partner Center account.
How to I register a new co-sell deal?

Sales from co-selling with Microsoft are listed as **Opportunities** in Partner Center. To register a new deal, go to **Referrals > Deal registrations > Action required** and select **+New deal**. To learn more, see [Register a new deal](#).

1. When you mark the Opportunity in the **Referrals** section as **Won**, during the accept or deny inbox process, a draft Deal Registration record is created for you at **Referrals > Deal registrations**.
2. Go to the **Referrals > Deal Registration** page.
3. Enter the required information for your referral.
4. To submit the record, select **Register**, and the deal moves to the **In progress** page.
How do I register non-co-sell sales?
For sales that aren’t co-sold with Microsoft or are legacy Partner Sales Connect (PSC)-shared deals, you need to create a new Deal Registration record.

1. Select Referrals > Deal Registration > Action Required > +New. Go to the Action Required page, as shown in the image that follows.
2. Select the +New button in the middle of the Action Required page.
For more information, see the non-co-sell registration process video.

How do I change a previously submitted deal registration?
You might want to change the registration for a submitted deal if to modify previously completed fields. Take these steps:

1. Go to Referrals > Deal Registrations on the left sidebar.
2. To see the prior deal registration, select the In progress tab. You can only edit items with the ISV Connect label (not the IP Cosell label).
3. Make changes and save them. Your future invoices will reflect the changes.
   NOTE: Previously invoiced amounts can’t be credited or refunded.

How do I publish my offer?
After you accept the agreement, set up billing, and enter all the required information in the tabs on the Offer overview page, you can submit your offer for review and then publish it.
This image shows the end-to-end cycle and expected times for each phase in the publishing process.

1. **Review and publish.** To go to the Review and publish page, select Review and publish from any page in the Offer overview section.

2. **Publish.** After you enter all the required information, the pages in the Offer overview section are marked as Complete in the Status column on the Review and publish page. Select Publish. Your offer moves from Draft status to In Review.
3. **Set Live status.** In a few days or weeks, when your offer is approved, you should receive a confirming email:

   a. At that time, go to **Commercial Marketplace > Overview** and select your offer.

   b. To move the offer from **Preview** to **Live** status, verify that the offer looks good by selecting the **AppSource preview** link.

   c. Select **Go live.**

   ![Offer overview](image1)

### How do I request the Premium tier?

By default, all offers are placed in the Standard 10% revenue-sharing tier upon enrollment. Publishers can request the Premium 20% revenue-sharing tier for offers that meet eligibility requirements.

After the status of your offer is **Live**, take these steps:

1. Sign in to **Partner Center**.

2. Go to **Commercial Marketplace > Overview.** Your existing Microsoft AppSource offers show in the middle of the page.

3. Select the offer that you want to request Premium for.

![Partner Center](image2)
4. Select **Offer setup**.

![Offer setup page](image)

5. Toward the bottom of the **Offer setup** page, you see the following text. To request the Premium tier, select the checkbox. Select **Save draft** or **Review and publish**.

**Business Applications ISV Program**

Your offer is currently enrolled in the Standard tier. If your solution meets program eligibility criteria, you may request an upgrade to the Premium tier which offers expanded program benefits. If you do so, be sure to complete the Co-sell module before you publish your offer. Learn more.

- The solution in this offer meets eligibility requirements, and I request an upgrade to the premium tier. If this request is approved by Microsoft, I understand that a higher revenue sharing fee will apply.

![Save draft and Review and publish buttons](image)

**NOTE:** You won’t see the **Business Applications ISV Program** section unless your offer is already enrolled in ISV Connect and live on Microsoft AppSource. For new offers, return to this page after your offer is fully enrolled and live.

**NOTE:** Only users with certain permissions can select **Review and publish** and take the next step to publish the request.

6. Select **Publish**:

   a. A review notification is sent to the **Microsoft Co-sell Desk**.
   b. The Co-sell Desk consults internally and then marks the request as approved or not approved in our publishing system.

If approved, the offer is automatically re-tagged in Partner Center as Premium tier.

**Where can I find Partner Center documentation?**

For more information on Partner Center roles, role assignment, and deal registration, see these documents:

- For **Partner Center roles**, see [Assign users roles and permissions](#).
- To **Create Partner Center users and assign roles**, see [Create user accounts and assign permissions](#).
- To report sales, see [Register your deals](#).

**NOTE:** Start at the **Register a New Deal** section. The information about deals you won doesn’t apply if you don’t co-sell. Also, for ISV Connect reporting, we use only Solution Value for revenue share calculation, although Total Contract Value may apply if you also participate in Azure IP Cosell.