Consulting Service Offerings on AppSource Submission Process

Request access to submit offers

Request access by emailing: <u>consultingsvcsupport@microsoft.com</u>

Include the following:

- Company Name
- MPN ID
- Account Owner email
- Additional User(s) email

Please include that you would like to publish Power BI Custom Visual offers in the email

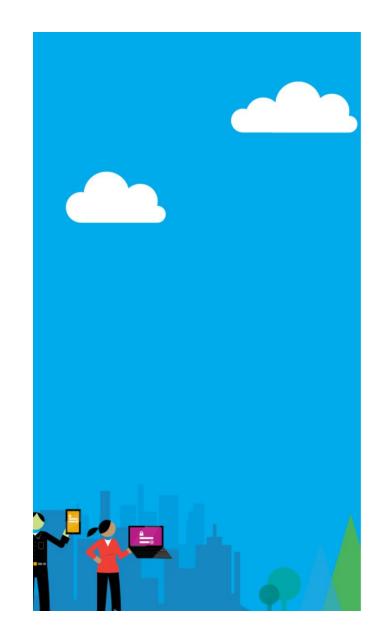
| | 5 c 🛧 | | | | | | Subr | mitting (| Consulting S | ervices o | n AppS | ource - N | vlessage (H | ITML) |
|---------------------|---|--------|-------------------------------|---|-------------|-------------------|---------|-----------------------|------------------------|-----------|--------|--|----------------------|------------------------------|
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| Paste | ∑ Cut È Copy Ў Format Paint lipboard | er B. | | ▲ A[*] □ ▲ A[*] □ ■ A[*] □ ■ Basic Text | | Address Book I | Names | Û Attach File ▼ | Attach Signa Item • | ature A | ssign | Follow (High Im Low Imp Tags | portance portance | Office Add-ins Add-ins |
| ⁼ ∎ Send | From ▼ | | ha@microsofi Itingsvcsuppo | t.com rt@microsoft.com | ; | | | | | | | | | |
| | Cc | | | | | | | | | | | | | |
| | Subject | Subm | itting Consulti | ng Services on Ap | pSource | | | | | | | | | |
| Comp | | | | to submit Co | nsulting Se | rvices or | ו AppSo | ource. | | | | | | |
| | | YOUR E | MAIL | | | | | | | | | | | |

Log in with your work email

Using your organization email account, log in to the Partner Portal.

https://cloudpartner.azure.com

Note: You must log in with a organization email associated with a Microsoft Organization ID. If you use this account to log into a number of Microsoft products, like Office 365 or Power BI, you're all set.



Cloud Partner Portal

Work or school, or personal Microsoft account

Email or phone
Password

□ Keep me signed in



Can't access your account?



Create a new offer

Create a new offer by selecting 'New Offer' in the menu.

Select 'Consulting Service' in the menu that appears.

Do not select anything else.

| ≡ | | Microsoft Cloud Partner Portal |
|---|---|--------------------------------------|
| + New offer | > | Azure Applications |
| ∃ All offers | | Consulting Service |
| 🕀 Approvals | | Cortana Intelligence |
| $\mathcal{P}_{\mathbf{B}}$ All publishers | | Dynamics 365 for Customer Engagement |
| ද Users | | Dynamics 365 for Financials |

Define offer settings

Offer ID is a unique name you create when you first submit the offer. The ID will be visible in the URL and impacts search engine results.

Name is what will show as the offer name on AppSource.

Note: There are 55 characters available for the Name field. During review, we will modify the Name field to match the criteria shown and will include name, duration, and offer type. Please keep titles short.

New Offer

CONSULTING SERVICE

| Editor | Status | | | | |
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| 📙 Save | 🛞 Discard | ⊕ î Publish | | | |
| Offer Settin | gs | Offer Identity | | | |
| Storefront [| Details | Offer ID * | consulting_service | | 0 |
| Contacts | | Publisher ID * | 0 | ~ | 0 |
| | | Name * | Example Service | | |
| | | | | | |
| | | Your Data An (YoDA): 5-Da Concept By Orion Dynamics 365 Power 1 \$7,999 | 31 | Name | |
| | | Conta | ct Me | | |

Categories of offerings

There are 5 categories for Consulting Services Offerings.

Carefully read the category descriptions and choose the category that best fits your offer type. Next, provide detailed descriptions based on the requirements outlined for each.

Note: We now accept virtual and onsite engagements designed for a single customer engagement.

| | Briefing An introduction to a solution or a consulting service to draw customer interest using frameworks, demos, and customer examples | | Assessm | ent | |
|---|---|---|---|---|--|
| | | | An evaluation customer's e to determine applicability solution and estimate of c timing | | |
| Proof of concept | | Implem | entation | Worksh | ор |
| A limited scope implementation to determine if a solution will meet a customer's requirements | | A complete installation that results in a fully working solution. For this pilot, we recommend limiting to solutions that can be implemented in 1-week or less | | on a custor premises th involve trair | nt conducted mer's nat could nings, ssessments, ouilt on the data or |

Offer summary is a brief single sentence description of your offer that appears just below the offer title.

Offer description guidance:

- Use Markdown or plain text with line breaks
- All workshops require a detailed agenda with topics that will be covered, and deliverables
- Training workshops do not require an agenda, but do require deliverables
- Briefings require at least 4 to 5 bullets with information on topics covered in briefing
- See offer description examples for more

New Offer

CONSULTING SERVICE

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| Offer Settings | Offer Details | | |
| Storefront Details | Offer summary * | Max 200 chars. | 0 |
| Contacts | | | |
| | Offer description * | Max 2000 chars. | 0 |
| | | | |
| | | | |
| | | | |
| | | | |
| Assessment Example | | <u>Workshop Example (multi-day)</u> | |
| Briefing Example | | Implementation Example | |
| <u>Workshop Example (m</u> | nulti-week) | Proof of Concept Example | |
| Assessment Example Briefing Example | Offer description * nulti-week) | Workshop Example (multi-day) Implementation Example | 6 |

Provide your Org MPN ID.

If you know your Partner center ID please provide it as well.

Those 2 fields will be used in the future to validate the partners, integrate with Product websites and Partner Center.

New Offer

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| Offer Settings | i | Publisher Ir | nformation | | |
| Storefront De | tails | MPN ID * | | 123456789 | 0 |
| Contacts | | Partner center ID | | 234343434 or CA761232-ED42-11CE-BACD-00AA0057B223 | 0 |
| | | | | | |

Create one offer per country.

Pricing: For paid offers, select currency, specify amount and choose fixed or *estimate.

Duration: Select Hours, Days or Weeks and specify number.

*Our data shows that customers typically prefer fixed-price, fixed scope offerings that cost less than \$5,000.

New Offer CONSULTING SERVICE

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| Offer Setting | gs | Listing Details | | | | | |
| Storefront Details | | Consulting service type * | Select an option | | | \sim | 0 |
| Contacts | | Country/Region availability * | Select an option | \sim | 0 | | |
| | | Pricing * | Free | Paid | | | |
| | | Currency * | Select an option | | | \sim | |
| | | Amount * | Eg.1034.43 | | | | 0 |
| | | Price indication * | Fixed | Estimated | | | 0 |
| | | Duration of engagement 🕕 | | | | | |
| | | Duration * | Select an option | | | \sim | |
| | | Hour/Day/Week * | Hours | Days | Weeks | | |

Search Keywords

Make sure to include CustomVisualsOffer as one of the Search Keywords

Editor Status 📙 Save X Discard ⊕ Publish Primary product * Offer Settings \sim 0 Power BI Storefront Details Search keywords (Max 3) × Enter a search keyword for your offer. Add keyword Contacts Agriculture Industries (Max 6) * 0 Architecture Engineering Distribution Education Financial Services Government

New Offer

Specify the industries that your offer targets.

Note: Microsoft has prioritized the following industries:

- Education
- Health care
- Public Sector
- Financial Services
- Manufacturing
- Retail

New Offer

CONSULTING SERVICE

| Save Sourced Offer Settings Industries (Max 6)* Agriculture Architecture Engineering Distribution Education Financial Services Government Health Care and Life Sciences Hospitality and Travel Nanufacturing Manufacturing National and Public Security Nonprofits Professional Services Real Estate Retail and Consumer Goods | Editor Status | | | |
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| Storefront Details Contacts Cintacts Cintacts | Save 🛞 Discard | ≓ Compare ⊕ Publish | | |
| Storefront Details Contacts Financial Services Government Health Care and Life Sciences Hospitality and Travel Manufacturing Media and Entertainment Notional and Public Security Nonprofits Professional Services Real Estate | Offer Settings | Industries (Max 6) * | Agriculture | 0 |
| Contacts Education Financial Services Government Health Care and Life Sciences Hospitality and Travel Manufacturing Media and Entertainment National and Public Security Nonprofits Professional Services Real Estate | Storefront Datails | | | |
| Contacts Financial Services Government Health Care and Life Sciences Hospitality and Travel Manufacturing Media and Entertainment National and Public Security Nonprofits Professional Services Real Estate | Storemont Details | | Distribution | |
| Financial Services Government Health Care and Life Sciences Hospitality and Travel Manufacturing Media and Entertainment National and Public Security Nonprofits Professional Services Real Estate | Contacts | | Education | |
| Health Care and Life Sciences Hospitality and Travel Manufacturing Media and Entertainment National and Public Security Nonprofits Professional Services Real Estate | contacts | | Financial Services | |
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| Manufacturing Media and Entertainment National and Public Security Nonprofits Professional Services Real Estate | | | Health Care and Life Sciences | |
| Media and Entertainment National and Public Security Nonprofits Professional Services Real Estate | | | Hospitality and Travel | |
| National and Public Security Nonprofits Professional Services Real Estate | | | Manufacturing | |
| Nonprofits Professional Services Real Estate | | | Media and Entertainment | |
| Professional Services Real Estate | | | National and Public Security | |
| Professional Services Real Estate | | | Nonprofits | |
| Real Estate | | | | |
| | | | Real Estate | |
| | | | | |
| Telecommunications | | | | |

Videos: Marketing Video. If you have a Partner Showcase for Power BI or PowerApps, please provide a link to the Showcase video.

Documents: Marketing brochure describing consulting service offering in detail and case studies in PDF format.

Screenshots: Images that provide more information about the offer, offer deliverables, or your company.

New Offer

CONSULTING SERVICE

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| Offer Settings | | Marketing | g Artifacts | | | | |
| Storefront Details | | Company logo 48x48) * | (.png format, | | Upload | 0 | |
| Contacts | | Company logo 216x216) * | (.png format, | | Upload | 0 | |
| | | Videos (Max 4 |) 🔒 | | | | |
| | | 🕂 Add video | | | | | |
| | | Documents (N | 1ax 3) * 🕦 | | | | |
| | | Document of | details | | | | |
| | | Name * | | Enter d | ocument | t name | 0 |
| | | File * | | | Upload | 0 | |
| | | + Add docum | ent | | | | |
| | | Screenshots (N | ⁄lax 5) * 🚯 | | | | |
| | | Screenshot | details | | | | |
| | | Name * | | Enter s | creenshot | ot name. | |
| | | lmage (.png, | , 1280x720) * | | Upload | 0 | |
| | | ⊕ Add screens | shot | | | | |

Lead destination: Select the lead destination for AppSource to pass leads to your company.

Provide details of lead destination.

The <u>Cloud Partner Portal</u> contains detailed instructions for Lead Management.

Lead Management

| Lead destination * | |
|--------------------|--|
|--------------------|--|

URL *

Authentication *

Username *

Password *

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Lead Management

| Lead destination * | Dynamics CRM Online | \sim | 0 |
|--------------------|---------------------|--------|---|
| URL * | | | |
| Authentication * | Office 365 | \sim | |
| Username * | | | |
| Password * | | | |

Provide contacts who Microsoft can reach out to for customer support and questions.

Microsoft may also reach out in case a customer is not contacted 48 hours within their lead submission.

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| CO | NSULTI | NG S | SERVICE |

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| Offer Settings | Primary Contact 🛛 | |
| Storefront Details | Name * | Enter the contact name |
| Contacts | Email * | Enter the contact email |
| | Phone * | Enter the contact number. |
| | Secondary Contact 0 | |
| | Name | Enter the contact name |
| | Email | Enter the contact email |
| | Phone | Enter the contact number. |

Publish your offer

Once you complete Offer Settings, Storefront Details, and Contacts, select publish and provide an email address.

Your offer will then go into the approval queue.

Please see the subsequent slides for more details on the approval process.

Example Service CONSULTING SERVICE

| Editor | Status | | | |
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| 🔚 Save 🛞 | Discard | ⊕ Publish | | Publish your offer |
| Offer Settings | | Offer lo | lentity | This process can take several days. To receive progress updates, provide one o more email addresses. |
| Storefront Details | | Offer ID * | | Emails (comma separated) |
| | | | | |
| | | | | You will get a chance to review and validate your offer via a private link before |



×

provide one or

Step 1: Offer review

Our team of professional marketers and copy writers will review your submission for clarity, brevity, inclusion of agenda, deliverables, grammar, and style.

This process currently takes about 2 weeks and not 1-2 days as shown on the portal.

Editor Status 🔅 Cancel Publish Publishing status: This offer must be approved before publishing can continue. Publishing Steps Validate Prerequisites (< 15 min) Offer settings provided are validated. Lead management validation and registration (< 15 min) Microsoft validates and registers lead mananagement details. Offer Approval (1 - 2 days) Microsoft validates the offer and approves. AppSource Packaging (< 1 hour) Offer is packaged to show up on AppSource. Publisher signoff Offer is available to preview. Ensure that everything looks good before making your offer live. Go Live

Live (< 3 hours) Offer is publicly visible and is available for purchase.

Step 2: AppSource representative engagement

An AppSource representative MAY reach out if more information is needed. This often includes, but is not limited to, a more detailed description and/or questions on pricing or timing of your offering.

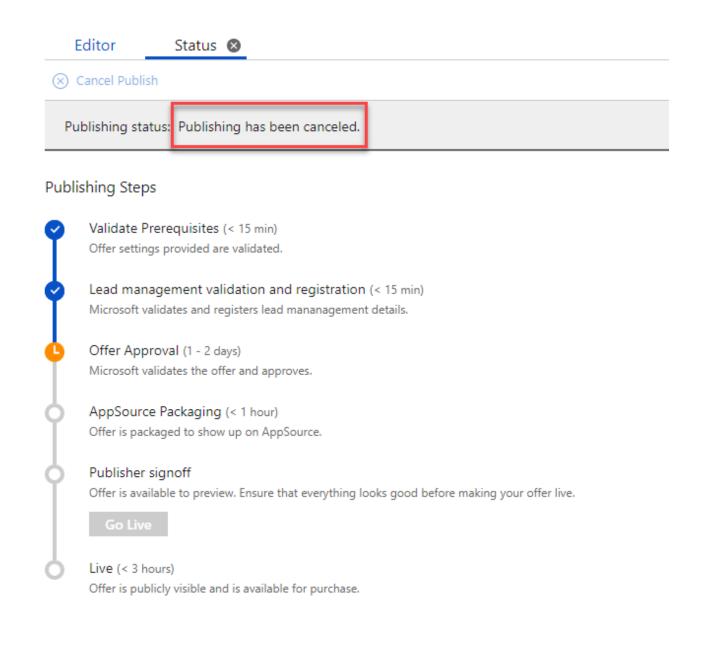
| File | Message & Cut | Insert Options Format Text Review Help Q Tell me what you want to do | | |
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| Paste | Copy Format Painte | Calibritistic Image: | | |
| | lipboard n't show MailTij | rs Basic Text rs Names Include Tags rs Add-ins Box | | |
| | From ▼ | consultingsvcsupport@microsoft.com | | |
| ₹ • Send | То | | | |
| | Cc | | | |
| | Subject | YOUR - AppSource Consulting Offer | | |
| Hello, Thank review <u>Offer #</u> <u>Offer #</u> | x you for you wing. <u>#1</u> <u>#2</u> | r interest in submitting Consulting Services offers on AppSource. I see that you previously submitted the below offers that we are currently in | n the process o | f |
| Thank review Offer # Offer # Offer # We hay out an | x you for you wing. # <u>1</u> # <u>2</u> # <u>3</u> ave found th nd compel cu | at successful offers have well-defined outcomes and deliverables, detailed agendas, and set clear expectations with the customers. Our goal Istomers to contact you. It would help expediate our approval process if you could take a few minutes to update the description for these of | is for your offe | r to star |
| Thank review Offer # Offer # Offer # We have out and around | x you for you wing. #1 #2 #3 ave found th nd compel cu id what the c | at successful offers have well-defined outcomes and deliverables, detailed agendas, and set clear expectations with the customers. Our goal | is for your offe | r to star |
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| Thank review Offer # Offer # We have out and around Below Works | x you for you wing. #1 #2 #3 ave found th nd compel cu id what the o v is a great e: shop exampl | at successful offers have well-defined outcomes and deliverables, detailed agendas, and set clear expectations with the customers. Our goal istomers to contact you. It would help expediate our approval process if you could take a few minutes to update the description for these of ustomer needs to prepare, the flow of the day (or week), and what are the exact deliverables at the end of the engagement. sample of a Workshop that you could follow to make your submissions shine. | is for your offe | r to star |
| Thank review Offer # Offer # Offer # We hav out and around Below Works Please Thanks | x you for you wing. #1 #2 #3 ave found th nd compel cu id what the o v is a great e: shop exampl e take a few | at successful offers have well-defined outcomes and deliverables, detailed agendas, and set clear expectations with the customers. Our goal istomers to contact you. It would help expediate our approval process if you could take a few minutes to update the description for these of ustomer needs to prepare, the flow of the day (or week), and what are the exact deliverables at the end of the engagement. cample of a Workshop that you could follow to make your submissions shine. e (multi-day) | is for your offe | r to star |

Step 3: Status Change

You may notice your offer changing from "Publish in Progress" status to "Publish Canceled" status.

This is expected behavior as our copy writers need to first cancel to make edits.

There is no action needed on your part at this time unless you've heard otherwise from an AppSource representative.



Step 4: Approval

Congrats! Your offer has now been reviewed, edited, and approved by the AppSource team.

You will receive an email with a green banner (shown), notifying you that your offer is available for preview.

<u>Action is needed</u> on your part to review your offer and publish.

Doing so will then push your offer live on the AppSource site.

Offer 'YOUR OFFER NAME' is available for preview

Congratulations! Your offer 'YOUR OFFER NAME' is available for preview.

Next Steps

Below are the preview link(s) for this offer. Please use these to verify and validate end to end experience.

Microsoft AppSource (Preview)

If you need to update your offer click <u>here</u>. If you need to make this offer live, click <u>here</u>.

Reply all to this email in case you need any help.

Thank you, Microsoft AppSource Team

This message from Microsoft is an important part of a program, service, or product that you or your company purchased or participate in. Microsoft respects your privacy. To learn more, please read our Privacy Statement.

Microsoft Corporation One Microsoft Way Redmond, WA, USA 98052



Step 5: Your offer is live

Changes can still be made at this point if needed.

Edit the offering as needed and click 'publish'. This will queue your changes to be approved and updated.

You existing offer will remain live until the edited offer is reviewed, approved, and published. Editor Status 🥝

🛞 Cancel Publish

Publishing status: This offer is live and publicly available.

Here are a few links to help you:

Microsoft AppSource

Publishing Steps

Validate Prerequisites (< 15 min) Offer settings provided are validated.

Lead management validation and registration (< 15 min) Microsoft validates and registers lead mananagement details.

Offer Approval (1 - 2 days) Microsoft validates the offer and approves.

AppSource Packaging (< 1 hour) Offer is packaged to show up on AppSource.

Publisher signoff Offer is available to preview. Ensure that everything looks good before making your offer live. Here are a few links to help you:

Microsoft AppSource (Preview)

Go Live

Live (< 3 hours) Offer is publicly visible and is available for purchase. Here are a few links to help you: Microsoft AppSource