Consulting Service Offerings on AppSource

Submission Process

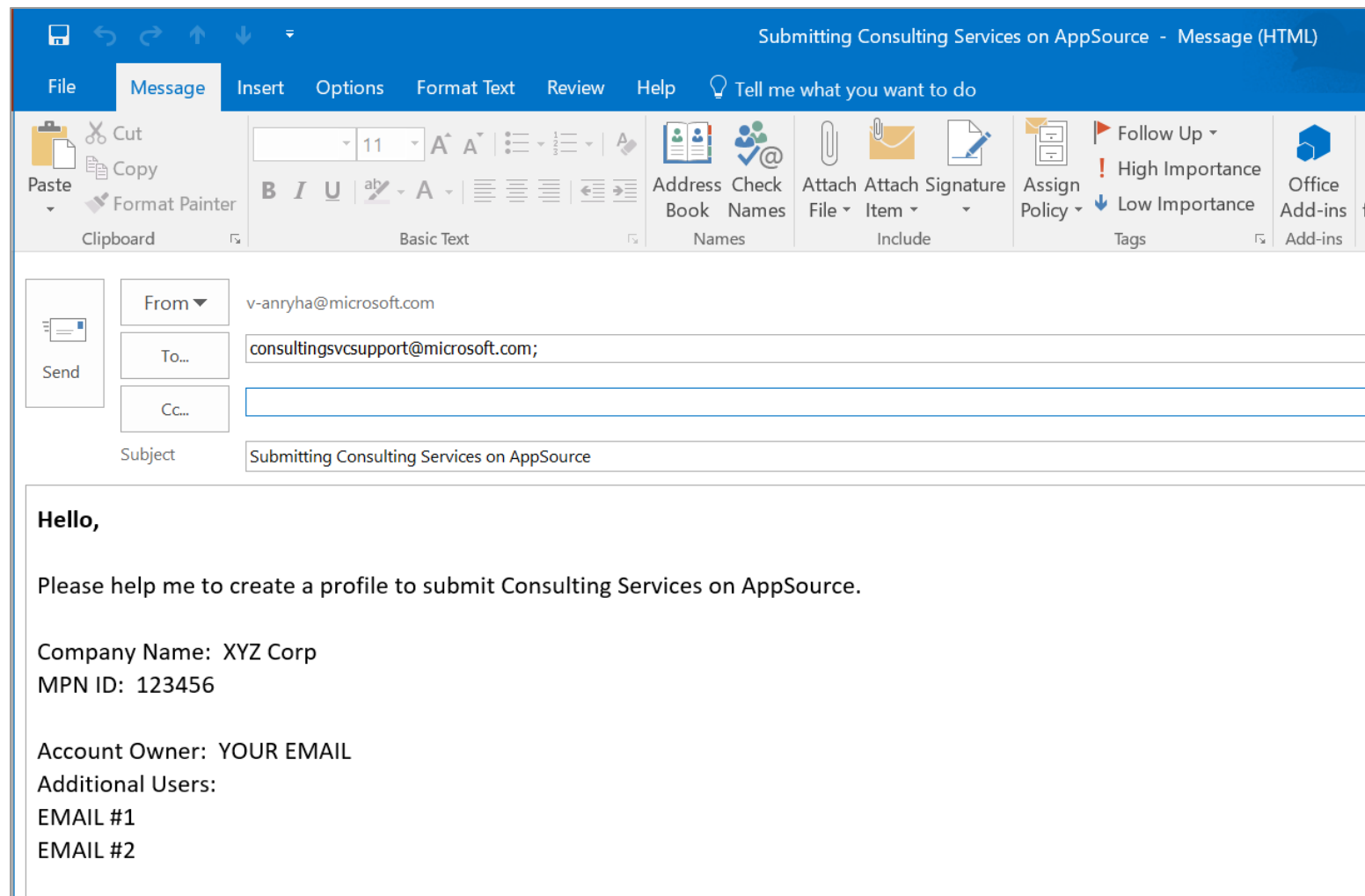# Request access to submit offers

Request access by emailing:
consultingsvcsupport@microsoft.com

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

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.
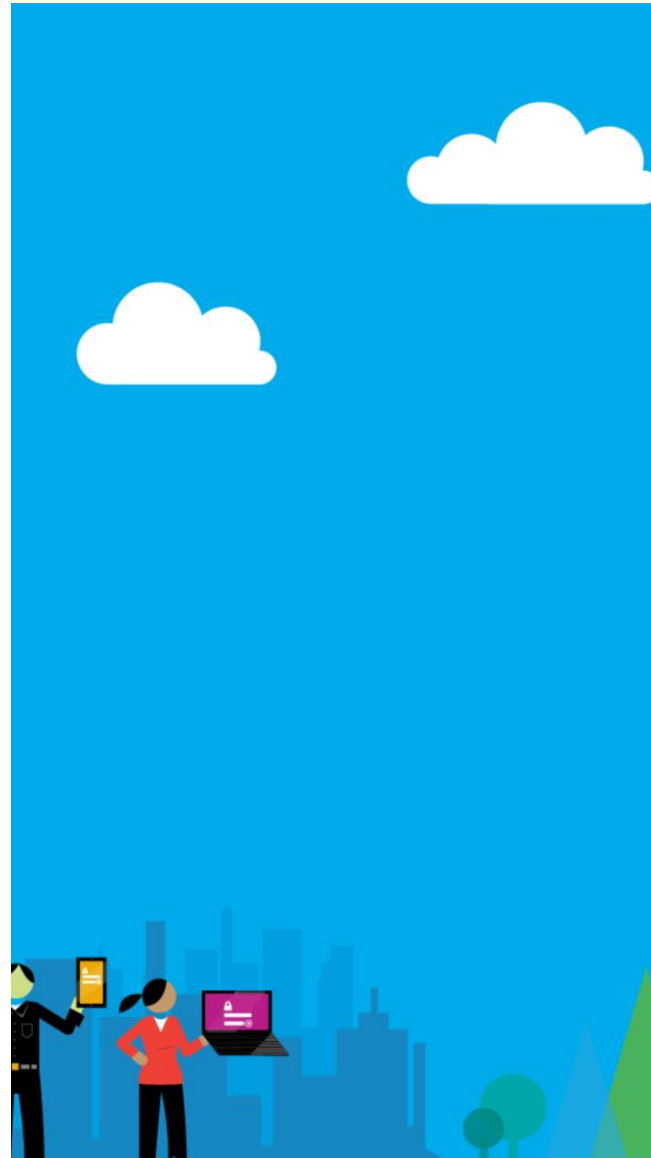
Cloud Partner Portal

Work or school, or personal Microsoft account

Email or phone

Password

☐ Keep me signed in

Sign in

Can't access your account?

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Microsoft

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.

Define offer settings

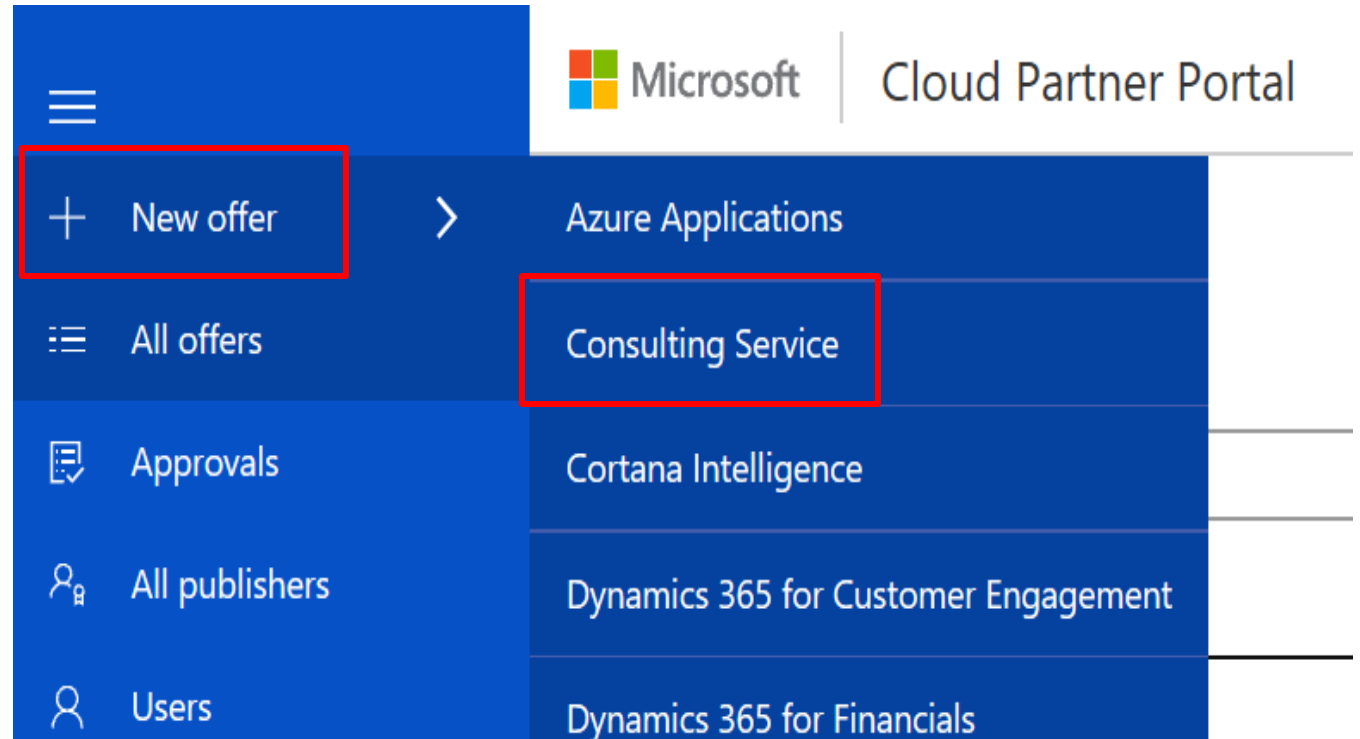Offer ID is a unique name you create when you first submit the offer. The ID will be visible in the URL and impacts search engine results.

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

Save   Discard   Publish

Offer Settings

Storefront Details

Contacts

Offer Identity

Offer ID *   consulting_service

Publisher ID *   0

Name *   Example Service

orion

Your Data Analyzed (YoDA): 5-Day Proof of Concept
By Orion
Dynamics 365 | Power BI

$7,999

Contact Me

Name

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

Assessment

An evaluation of a customer's environment to determine applicability of a solution and provide an estimate of cost and timing

Proof of concept

A limited scope implementation to determine if a solution will meet a customer's requirements

Implementation

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

Workshop

An interactive engagement conducted on a customer's premises that could involve trainings, briefings, assessments, or demos built on the customer's data or environment

Define offer details

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

Editor   Status

💾 Save   ⊗ Discard   ⇄ Compare   🌐 Publish

Offer Settings

Storefront Details

Contacts

Offer Details

Offer summary *
> Max 200 chars.   ⓘ

Offer description *
> Max 2000 chars.   ⓘ

Assessment Example   Workshop Example (multi-day)
Briefing Example   Implementation Example
Workshop Example (multi-week)   Proof of Concept Example

Define offer details

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
CONSULTING SERVICE

Editor   Status

💾 Save   ⊗ Discard   ⇄ Compare   🌐 Publish

Offer Settings

Storefront Details

Contacts

Publisher Information

MPN ID *

`123456789`   ⓘ

Partner center ID

`234343434 or CA761232-ED42-11CE-BACD-00AA0057B223` ⓘ

Define offer details

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

| Editor | Status |

💾 Save   ⊗ Discard   ⇄ Compare   🌐 Publish

Offer Settings

Storefront Details

Contacts

Listing Details

Consulting service type *

Select an option ⌄   ℹ️

Country/Region availability *

Select an option ⌄   ℹ️

Pricing *

| Free | Paid |

Currency *

Select an option ⌄

Amount *

Eg.1034.43   ℹ️

Price indication *

| Fixed | Estimated | ℹ️

Duration of engagement ℹ️

Duration *

Select an option ⌄

Hour/Day/Week *

| Hours | Days | Weeks |

Search Keywords

Make sure to include CustomVisualsOffer as one of the Search Keywords

New Offer
CONSULTING SERVICE

| Editor | Status |

Save   Discard   Compare   Publish

Offer Settings

Storefront Details

Contacts

Primary product *   Power BI

Search keywords (Max 3)   Enter a search keyword for your offer.   ✕

⊕ Add keyword

Industries (Max 6) *   ☐ Agriculture
                            ☐ Architecture Engineering
                            ☐ Distribution
                            ☐ Education
                            ☐ Financial Services
                            ☐ Government

Define offer details

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

Editor   Status

💾 Save   ⊗ Discard   ⇄ Compare   🌐 Publish

Offer Settings

Storefront Details

Contacts

Industries (Max 6) *

- ☐ Agriculture
- ☐ Architecture Engineering
- ☐ Distribution
- ☐ 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
- ☐ Retail and Consumer Goods
- ☐ Telecommunications

Define offer details

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.

Define offer details

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

Provide details of lead destination.

The Cloud Partner Portal contains detailed instructions for Lead Management.

Lead Management

Lead destination *   Dynamics CRM Online ⌄

| Select an option |
| Azure Blob |
| Azure Table |
| **Dynamics CRM Online** |
| HTTPS Endpoint |
| Marketo |
| SalesForce |

URL *

Authentication *

Username *

Password *

Lead Management

Lead destination *   Dynamics CRM Online ⌄

URL *

Authentication *   Office 365 ⌄

Username *

Password *

Define offer details

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.

New Offer
CONSULTING SERVICE

Editor	Status

💾 Save   ⊗ Discard   ⇄ Compare   🌐 Publish

Offer Settings

Storefront Details

Contacts

Primary Contact ⓘ

Name * | Enter the contact name |
Email * | Enter the contact email |
Phone * | Enter the contact number. |

Secondary Contact ⓘ

Name | Enter the contact name |
Email | Enter the contact email |
Phone | Enter the contact number. |

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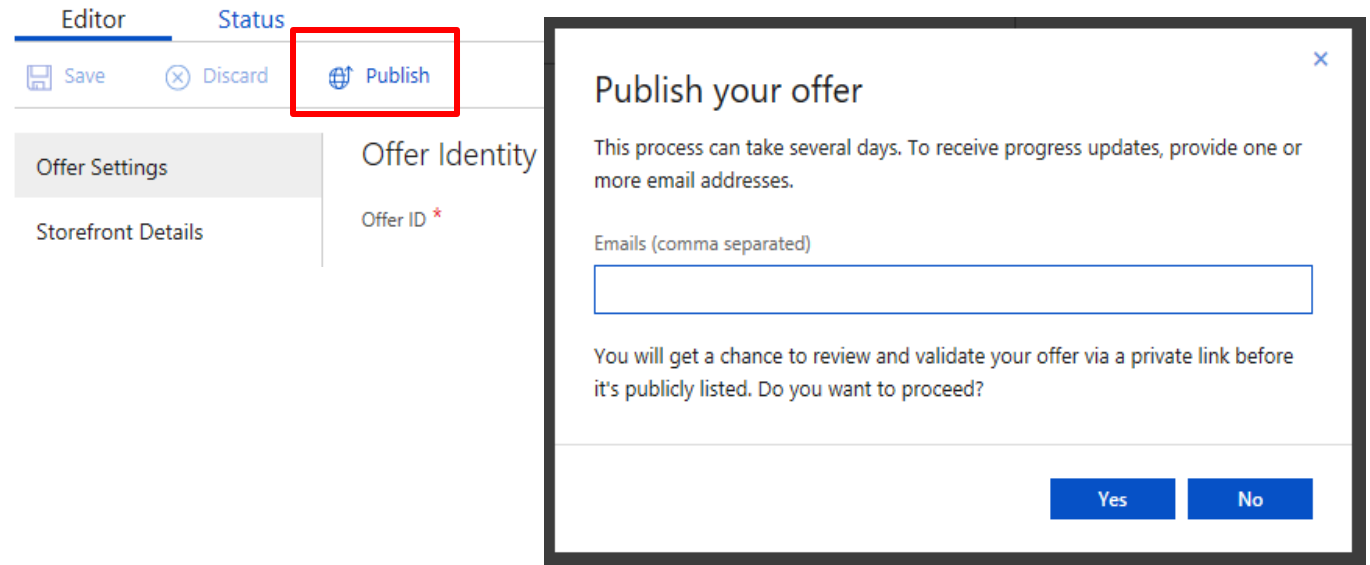
Once you complete Offer Settings, Storefront Details, and Contacts, select publish and provide an email address.

Your offer will then go into the approval queue.

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

Approval process

Step 1: Offer review
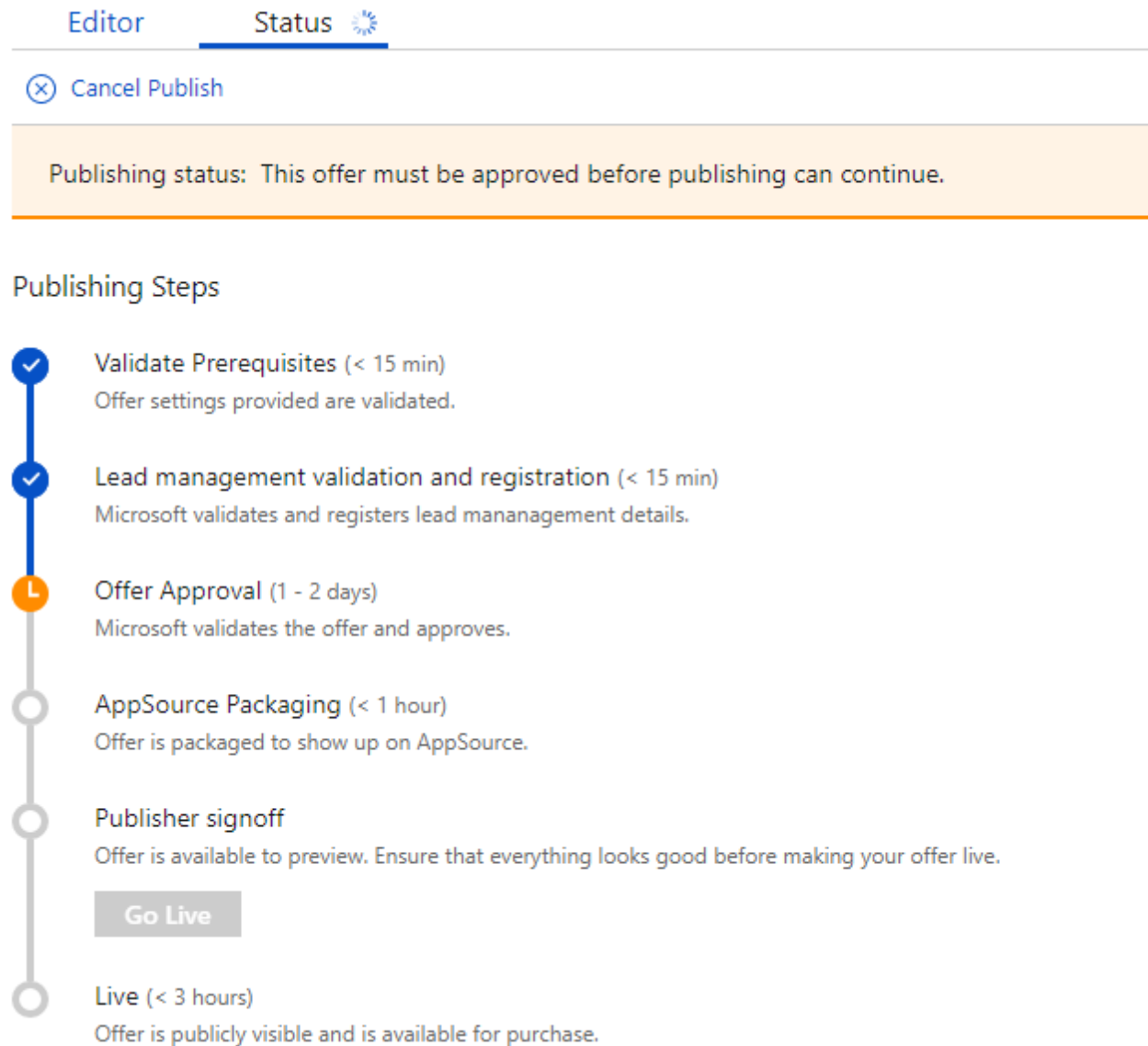
Our team of professional marketers and copy writers will review your submission for clarity, brevity, inclusion of agenda, deliverables, grammar, and style.

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.

Approval process

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.
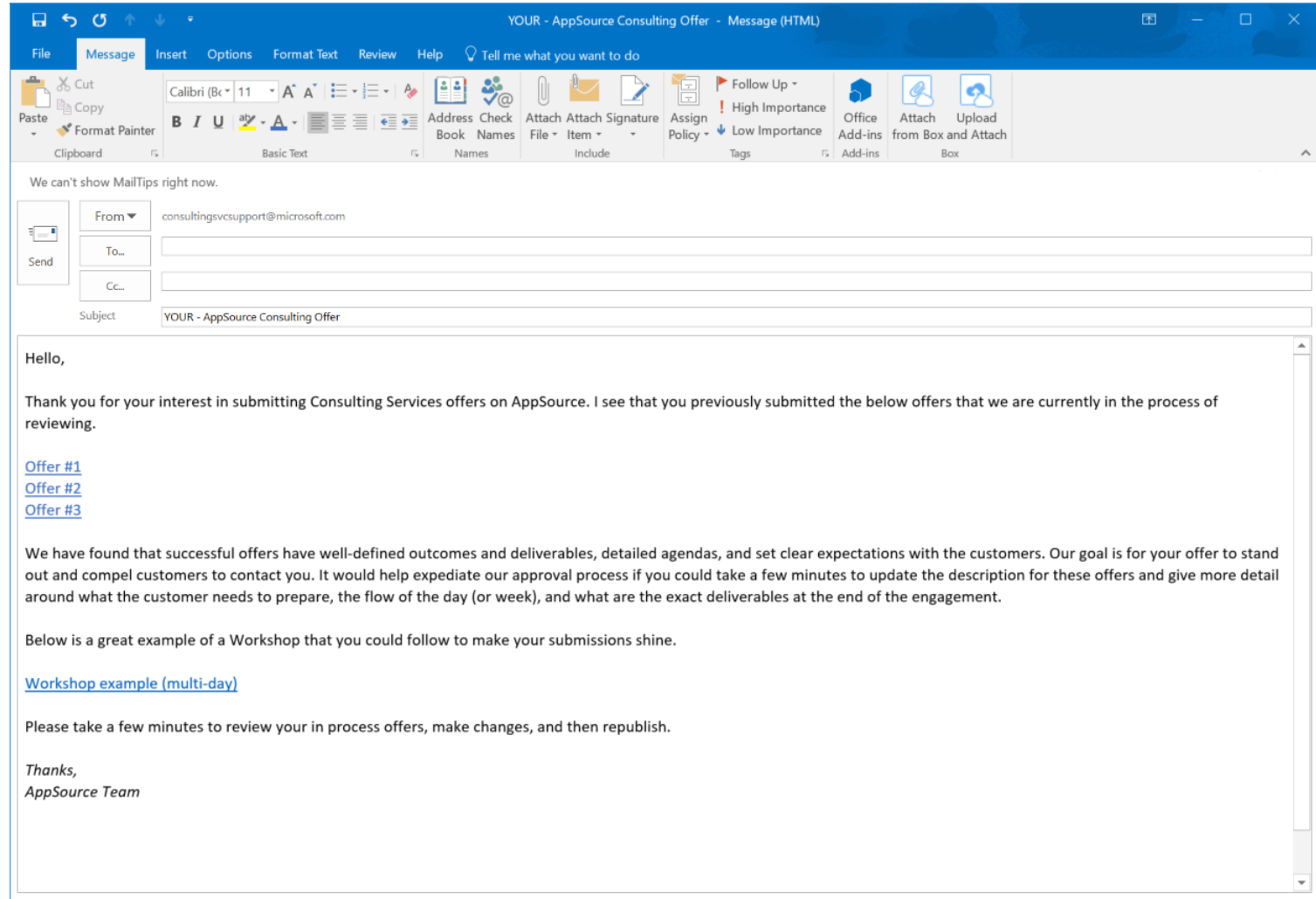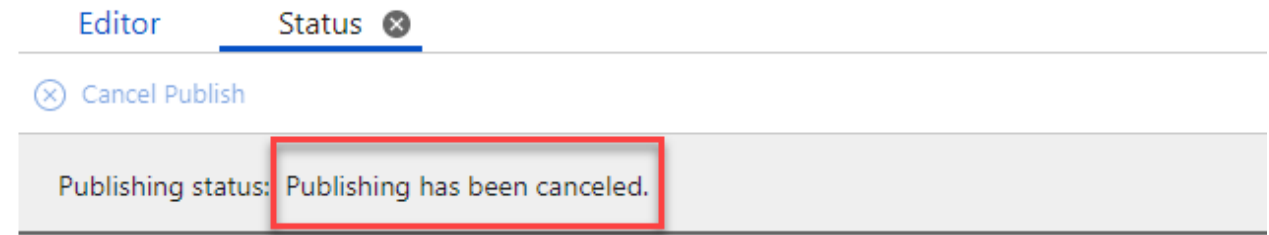
Approval process

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.

Approval process

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 here.
If you need to make this offer live, click here.

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

Microsoft

Approval process

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