Introduction

Dynamics 365 for Finance and Operations provides a comprehensive platform for ISVs looking to build solutions around accounting, manufacturing, scheduling, supply chain, and other enterprise resource planning processes. This guide is designed to help new ISV partners walk through the standard Microsoft programs and services necessary to develop and publish solutions, including how to use Lifecycle Services, stage offers in the Cloud Partner Portal, and validate and publish your solution on AppSource.

This guide is broken down into three sections: First, it outlines the process to become a Microsoft publishing partner, including registering for the Microsoft Partner Network (MPN) and Cloud Partner Portal (CPP). If you are already a Microsoft partner with Cloud Partner Portal (CPP) access, you can skip this section. The second section provides an overview of how to build your Finance and Operations app on the Dynamics 365 platform. The third section walks through the steps to package and publish your application for listing on AppSource, including information on Microsoft’s Go-to-market services. Lastly, we’ve included links to additional resources to help you find answers to questions and to provide additional guidance for when you’re ready to move beyond the basics.
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*If you are already a Microsoft Partner with Cloud Partner Portal access, you can skip this section.*
Prerequisites

Before you begin building and publishing 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 you need to build, market, and sell your solution. 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 at https://signup.live.com.

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 need to join the Microsoft Partner Network (MPN), at which time you will be assigned an MPN ID. MPN membership is free to all partners, and you can enroll in MPN at https://partner.microsoft.com/en-us/membership.

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

Learn how to manage your Partner Center account.
Prerequisites

Set up your Partner Center account
Once you have joined the Microsoft Partner Network (MPN), you can set up your Partner Center account. Your Partner Center account provides you with access to pricing information, tools and services, and enables you to manage admin credentials for your company's work account. Partner Center 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 the Cloud Partner Portal
The first step to becoming a publisher is to register in the Cloud Partner Portal (CPP). The CPP is where you submit your apps' marketing content for publication, publish and promote your apps, and manage your Dynamics 365 for Finance and Operations offers.

To be registered for CPP and gain access, you must nominate your app by completing a brief form located at https://appsource.microsoft.com/en-us/partners/signup. Shortly thereafter, you will receive a welcome email from one of our team members with the next steps and to schedule an onboarding meeting. Once registered, you can access the Cloud Partner Portal (CPP) at https://cloudpartner.azure.com.

Sign up for Lifecycle Services (LCS)
You must sign up for a Lifecycle Services (LCS) account at https://lcs.dynamics.com. Lifecycle Services (LCS) is where you will package your solution for deployment and manage your application lifecycle.
Create a seller account

Creating a seller account gives you the necessary resources to market and sell your solutions on AppSource.

Create a Microsoft Developer account

To market and sell your solutions on the AppSource marketplace, you must create a Microsoft Developer account in the Microsoft Developer Center at http://dev.windows.com/registration. When registering, be sure to use the same Microsoft account ID that was used for the Cloud Partner Portal to ensure that your Microsoft Developer and Cloud Partner Portal accounts are appropriately linked.

Sign up for the Dynamics Insider Program

In addition to the above steps, all partners must join the Dynamics Insider Program, which you can find at https://experience.dynamics.com/insider. Through the Dynamics Insider Program, you can gain access to partner resources, test and validate new features, and provide your valuable feedback.
Building your application

Step 1
Set up a Dynamics 365 for Finance and Operations environment
  • Trial-based development environment

Step 2
Access developer tools and tutorials
  • Tools
  • Tutorials
Building 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 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 https://trials.dynamics.com/Dynamics365/Signup, and click on the “Sign up here” link next to the copy that asks if you are using this trial for development purposes.
Building your application

2 Access developer tools and tutorials

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

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

## Step 1
**Create a package**
- Create a new project in Lifecycle Services (LCS)
- Assemble asset library
- Create a solution package

## Step 2
**Validate your application**
- Generate a Customization Analysis Report (CAR)
- Validate app requirements
- Publish your offer in Lifecycle Services (LCS)
- Generate a solution identifier

## Step 3
**Create a new offer**
- Fill out App Nomination form
- Create a new offer in the Cloud Partner Portal
- Link your Solution identifier

## Step 4
**App validation process and approval in CPP**
- Contact the Dynamics 365 for Finance and Operations team to initiate the review process
- Steps to go live on CPP

## 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
Build a Lifecycle Services (LCS) solution package and publish

1 Create a package

Create a new project in Lifecycle Services (LCS)
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, used for demo and presale scenarios
- **Process Data Packages (PDP)**: bundled data packages that align to 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 overlaying 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 & Privacy policy

2 Validate your application
Generate a Customization Analysis Report (CAR)
The Customization Analysis Report 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 the Customization Analysis Report (CAR) and how to generate the report.
Validate app requirements
Microsoft requires specific reviews before validating 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 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

Publish your offer in Lifecycle Services (LCS)
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.

*The only Methodology requirement is the Learn phase.

Get more details on the application validation requirements and process.
Generate a solution identifier
Once you publish your app in Lifecycle Services (LCS), it will automatically generate a Solution identifier. This Solution identifier is the key that will link the LCS Solution package with your Cloud Partner Portal offer, which we will walk through next.

3 Create a new offer

Fill out App Nomination form
Before you create a new offer, you must complete an App Nomination form, even if you are already registered in the Cloud Partner Portal. Shortly after submitting the form, one of our team members will follow up to help you with the validation process before you can publish your app on AppSource. You can find the App Nomination form at https://appsouce.microsoft.com/en-us/partners/signup.

You must also complete the form if you are making a major update to your offer. Minor updates do not require the form to be completed.

Dynamics 365 for Finance and Operations app type defaults to “Contact me” on the AppSource listing, which means customers can request a trial of your solution directly. Test drive can be enabled for a Microsoft-hosted trial environment.
Create a new offer in the Cloud Partner Portal

Creating an offer on CPP is a required artifact for your marketing content. You can create an offer in the CPP at the same time that you create the solution package in LCS.

Each app listed on AppSource corresponds to an “Offer” in the CPP. 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 your offer, you will be asked to provide information, including:

- **Offer Settings**: Offer ID, Publisher ID, Name
- **Technical Info**: Meta data (e.g., categories, regions, marketing artifacts, Azure storage URL of the solution package, and CAR uploaded for validation asset)
- **Test Drive**: (Optional) Provide a Microsoft-hosted test environment where users can use and explore a functional version of the app that has been preconfigured with demo data
- **Storefront Details**: Offer summary, Offer description, Industries, Categories, Terms, etc.
- **Contacts**: Engineering Contact, Support Contact

Dynamics 365 for Finance and Operations app type defaults to “Contact me” on the AppSource listing, which means prospective customers can request a trial of your solution directly. Test drive can be enabled for a Microsoft-hosted trial environment in your CPP offer.

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 Info 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 the CPP.
Package and publish

4 App validation process and approval in CPP

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 CPP offer. A final review will follow for a demo of the solution before approval on CPP.

Click Publish to submit your app for approval
Once you have completed the review meetings, you will be directed to publish the offer on CPP to get into the approval queue. Click Publish to begin the publishing approval process. Progress can be tracked on the offer page.

Steps to go live on CPP
• Validate prerequisites: Offer settings provided are validated (<15 min)
• Test Drive validation: If Test Drive is enabled, Microsoft validates the Test Drive can be deployed and be replicated (<2 hours)
• Lead management validation and registration: Microsoft validates and registers lead management details. (<15 min)
• Offer Approval: Microsoft approves the offer. (1-2 days)
• AppSource Packaging: Offer is packaged to show up on AppSource (<1 hour)
• Publisher signoff: Offer is available to preview. Ensure that everything is correct before making your offer live.
Package and publish

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.

Monitor performance and collect leads
Within the offer page in the Cloud Partner Portal, 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.”.

6 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 at https://partner.microsoft.com/reach-customers/gtm.
Package and publish

**ISV Cloud Embed Program**
If you have built or intend to build a vertical/industry focused solution on top of Dynamics 365 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; benefit from a growing community of Office 365 and Dynamics 365 customers through AppSource; and receive critical Go-To-Market and 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
2. Solution published on AppSource
3. Become CSP Direct Bill partner through this [link](#)

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.

You can review the [Program Overview](#), [Licensing guide](#), and [ISV Cloud Embed Handbook](#) to familiarize yourself with the ISV Cloud Embed Program.
Additional resources
Additional resources

• Microsoft Dynamics 365 for Finance and Operations documentation
• Videos for Finance and Operations
• Publishing guide for Dynamics 365 for Finance and Operations

• Development and administration for Finance and Operations
• Lifecycle Services user guide
• External Partner Shared Site [restricted access]
• ISV Licensing
• Implementation lifecycle management for Microsoft Dynamics 365 for Finance and Operations
• Software lifecycle policy and cloud releases

Getting Started Guides
Interest in building apps for Dynamics 365 for Finance and Operations and using Power platform? Check out our other Getting Started Guides.
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