



ISV ONBOARDING GUIDE



INTRODUCTION

The onboarding guide walks through the process of becoming a Salesforce AppExchange Partner and deploying your solution on the AppExchange. Your journey consists of six milestones. Whether you have finished developing your solution or have an idea that you want to bring to market, you can leverage this guide as a reference for the most important phases of the AppExchange ISV onboarding process. Keep in mind that some of the steps outlined in this guide will require you to provide detailed insights into your technology use cases and development.



Ready to begin your journey with the AppExchange?
Below is an outline of the six onboarding milestones:



1. JOIN THE PARTNER COMMUNITY



The first step to becoming an AppExchange Partner is to join the Partner Community. The Partner Community is the Salesforce hub for existing AppExchange Partners and those looking to join the AppExchange Partner Program. Within the Partner Community, existing and prospective ISVs can discover partner resources and collaboration forums. It's also the place where AppExchange partners can manage their listings and solutions. Keep in mind, only once you have a contract signed are you considered a formal AppExchange partner.

How to Join the Partner Community:

1. Create a Salesforce username:

- Go to the [Partner Community](#) and click the “Join Now” button on the Partner Community homepage and follow the steps to create a Salesforce username. To ensure you have access to all the necessary Partner tools, we recommend you create new Salesforce credentials (even if you have pre-existing Salesforce credentials) by selecting “Get a Salesforce User Name” on the log in screen.
- Once you have filled out the necessary forms to create your username (your username must be unique), you will receive an email confirmation to the email address that you provided.
- Use the link within your email confirmation to create a permanent password and to verify your Salesforce account. You will be logged into the Enterprise Edition of Salesforce, also known as your Partner Business Org (PBO).

2. Log in and Select Program Type:

- You are now ready to log in to the [Partner Community](#). Enter your new Salesforce username credentials. Your user should be automatically detected if you are still logged in to the PBO.
- Once you are logged in, you will be asked to select one of two options:
 1. “My Company is Already a Partner”
 2. “Join Partner Program”

Those looking to join our partner program should select the “Join the Partner Program” option.

- Fill out the information requested and make sure that you select “AppExchange ISV Partner” when asked for “Partner Type.”

- You will need to review and agree to the [Salesforce Partner Program and the Salesforce Partner Program Agreement \(SPPA\)](#). Once you have clicked through and agreed to the program terms, your solution will be approved within minutes.

For additional details and screenshots of the Partner Community sign up process, [refer to this page](#).



2. BUILD YOUR SOLUTION

You can start the AppExchange onboarding process without development of your solution being complete. On the other hand, your development may be well underway or already complete. Whether your solution is in early or advanced stages of development, you should be clear on the architecture and ready to provide that information for the AppExchange team to review in milestones three and beyond.

We strongly recommend reviewing the technology resources below to set your solution up for success in later milestones and on the AppExchange:

- Review the trail on [Building Apps as an AppExchange Partner](#).
- Join our “ISV Tools & Process” and “The Salesforce Platform” webinars in our [Partner Success Basics Webinar Series](#).



3. PREPARE SOLUTION DOCUMENTATION

In the Solution Documentation milestone, you will need to provide some listing and pricing information as well as insights into your solution's go-to-market strategy and technology use cases.

The Solution Documentation process is made up of five key steps:

1. Start Initial AppExchange Listing Process
2. Submit Listing Price Information
3. Complete and Submit the Business Plan
4. Enter Compliance Process
5. Solution Documentation Validation

1. Start Initial AppExchange Listing Process

- To create a new AppExchange listing, log in to the [Partner Community](#) and click on the “Publishing” tab in the homepage navigation bar.
- Within the “Publishing” tab, click the “New Listing” button. You need to fill out several fields (listed below) on the “New Listing” page:
 1. Listing Title
 2. What are you listing? (Refer to “*Listing Type Definitions in the Appendix for details on all listing types*”)
 3. Marketplace (English, Japanese)
- Once you have clicked and submitted on the “New Listing” page, you will be taken to the “Business Plan” page.



2. Submit Listing Price Information

Within the “Pricing” tab, you will need to identify whether your solution is “free,” “paid, with Checkout” or “paid, without Checkout.” It is important to include pricing information on your listing. If you are unsure of your intended pricing model, please select “paid, without Checkout.” This can be modified later in the onboarding process once your Business Plan has been reviewed by the AppExchange team.

Learn more about our pricing models and how we define “free” versus “paid” in the [Partner Program Policy](#). Refer to, “AppExchange Partner Program Policies – Page 2.”

3. Complete and Submit the Business Plan

Once you have completed your listing price information, navigate to the “Business Plan.” Complete the “Business & Product Information” questionnaire. If you plan to charge for your solution and have updated the “Pricing” tab accordingly, the “Due Diligence & Compliance Certification” will be available and is required for Business Plan submission. Once you have filled out each of the questionnaires, click the “Submit for Approval” button on the bottom right of the page.

1. Business & Product Information
2. Due Diligence and Compliance Certification

(Note: the Due Diligence and Compliance Certification includes uploading of specific business and legal documents)

Waiting for your Business Approval? Now is a good time to think about, and get ahead of, Security Review. Review the necessary preparation materials on the [Security Review Overview Page](#). If you have questions, post in the [AppExchange Partner Security Review Chatter Group](#).

4. Enter Compliance Process

After your Business Plan is submitted, you will enter our Compliance Review process. The compliance process is our internal legal review to ensure that every solution and AppExchange Partner meets the highest standard of trust. This process can take a couple of weeks. We appreciate your patience as we uphold trust as our #1 Salesforce value.

5. Solution Documentation Validation

The AppExchange team will need to validate all information provided within the solution documentation that you submitted. You will hear directly from the AppExchange team during this milestone.

4. SIGN A PARTNERSHIP AGREEMENT WITH SALESFORCE

The Partnership Agreement process looks different for every prospective partner and is influenced by factors such as technology use case and business go-to-market strategy. The AppExchange team will work with you individually to complete milestone four. Once you have a signed partnership agreement with the AppExchange, you are a formal ISV partner.



5. COMPLETE SECURITY REVIEW



Once your Solution Documentation and Compliance review have been approved, you are ready to submit your solution for Security Review. Security Review ensures that the solution you publish on the AppExchange meets Salesforce's strict security requirements and provides the highest level of protection to customer data. You can expect the Security Review process to take about four to six weeks from the time your solution is officially accepted by the AppExchange team. Make sure that the email you use to submit is one that is being monitored actively. We will be reaching out to this email with any necessary updates or questions.

In the Publishing Console, there are two options to submit for Security Review. The first option is to select the listing, go to the "Solutions" tab and click "Start Review." The second option is to go to the "Packages" tab and click "Start Review."

Read through the [Security Review Overview Page](#) in the Partner Community for a step-by-step view of the entire process and how to prepare.

If you have questions, post a question on the [AppExchange Partner Security Review Chatter Group](#).

6. DESIGN AND PUBLISH YOUR APPEXCHANGE LISTING



Once your solution passes Security Review, you can list your solution on the AppExchange. It is important to take the steps necessary to ensure your AppExchange listing is optimized for design and content to drive the highest level of engagement and conversion.

Before you publish your solution, we encourage you to review the following resources to learn what makes a great AppExchange listing:

- Watch the video on [how to create the perfect AppExchange listing](#).
- Join our weekly [Partner Success Basics webinar series](#) for listing and marketing best practices. After you have reviewed these resources, the final step is to publish your listing on the AppExchange. To publish your listing, click the “Publish Listing” button within the “Publishing” tab inside the Partner Community. Your solution will then become live on the AppExchange – the world’s leading enterprise cloud marketplace!

APPENDIX

GENERAL RESOURCES:

- [Partner Success Basics Webinar Series](#)

Get grounded on the fundamentals of AppExchange technology and building a successful business on the AppExchange.

- [Partner Program Categories](#) (pg. 9–11)

Understand the AppExchange Program Categories in the Program Year 2020 Salesforce Partner Program Policies document.

- [AppExchange “Checkout”](#)

- “Checkout” is a solution distribution method available on the AppExchange. Powered by Stripe, “Checkout” lets customers buy your solution directly from AppExchange with a credit card or bank transfer.
- “Checkout” is not ideal for all Partners. Accurately and thoroughly completing milestone three (Prepare Solution Documentation) helps ensure the AppExchange team can accurately advise if “Checkout” is right for your business and solution.
- Once you know “Checkout” is right for you, the steps to setup and initiate “Checkout” for your listing are self-service.

- **Listing Type Definitions:**

- **Lightning Platform**

A solution delivered exclusively via a managed package and distributed on the AppExchange.

- **Composite**

A solution delivered via a managed package and off-platform services and distributed on the AppExchange.

- **API-Only**

A solution that works with Sales Cloud or Service Cloud, but doesn’t use a managed package. These types of solutions are called Salesforce APIs and run outside the Lightning Platform.

- **Lightning Component**

A solution consisting of one or more Lightning components and distributed in the component store on AppExchange.

- **Bolt Solution**

A solution consisting of a [Communities Lightning Bolt template](#) and distributed in the [Bolt Solution store](#) on AppExchange.

- **Flow Solution**

A solution consisting of a [Lightning Flow](#) and distributed in the [Flow Solution store](#) on AppExchange.

– Lightning Data

A [data enrichment solution](#) that's distributed in the [Lightning Data app store](#) on AppExchange.

– Einstein Analytics

A base or extension managed-package that contains an Einstein Analytics solution. See the [Einstein Analytics Collection](#) of the AppExchange.

– Marketing Cloud

A solution that integrates with Marketing Cloud and is distributed in the [Marketing Cloud Product Collection](#) of the AppExchange. Marketing Cloud solutions require an additional technical questionnaire to be completed.

– Quip Live App

An app designed for Quip that is distributed in the [Quip Live Apps](#) Collections on the AppExchange.

• [TrialForce](#)

Seamlessly deliver free trials to your customers with a free trial of your AppExchange solution.

• [How to Develop AppExchange Apps with SalesforceDX](#)

• [Understand Partner Orgs](#)

QUESTIONS?

• **Technical Onboarding Questions**

Post a question in the Partner Community
[AppExchange & ISV Technical Enablement Chatter Group](#)

DEVELOPER/LISTING TOOLS:

• [License Management Application \(LMA\)](#)

Manage leads and licenses for your AppExchange solutions with LMA.

• [Channel Order App \(COA\) Overview](#)

Learn how to submit and manage customer orders with COA.

