AppExchange ISV Partner Onboarding Guide

Introduction

Welcome to the AppExchange Partner ecosystem. If you're here, you have an idea to bring to market or have already developed your solution. No matter where you are on your journey, this guide will walk you through the onboarding process step by step. We will cover everything from joining the Partner Community to building your solution and finally launching on AppExchange. Keep in mind that you will be required to provide detailed insights on your technology use cases and development throughout the onboarding process. Let's get started.

Ready to begin? Let's dive in.

The onboarding journey consists of **five steps** shown below:

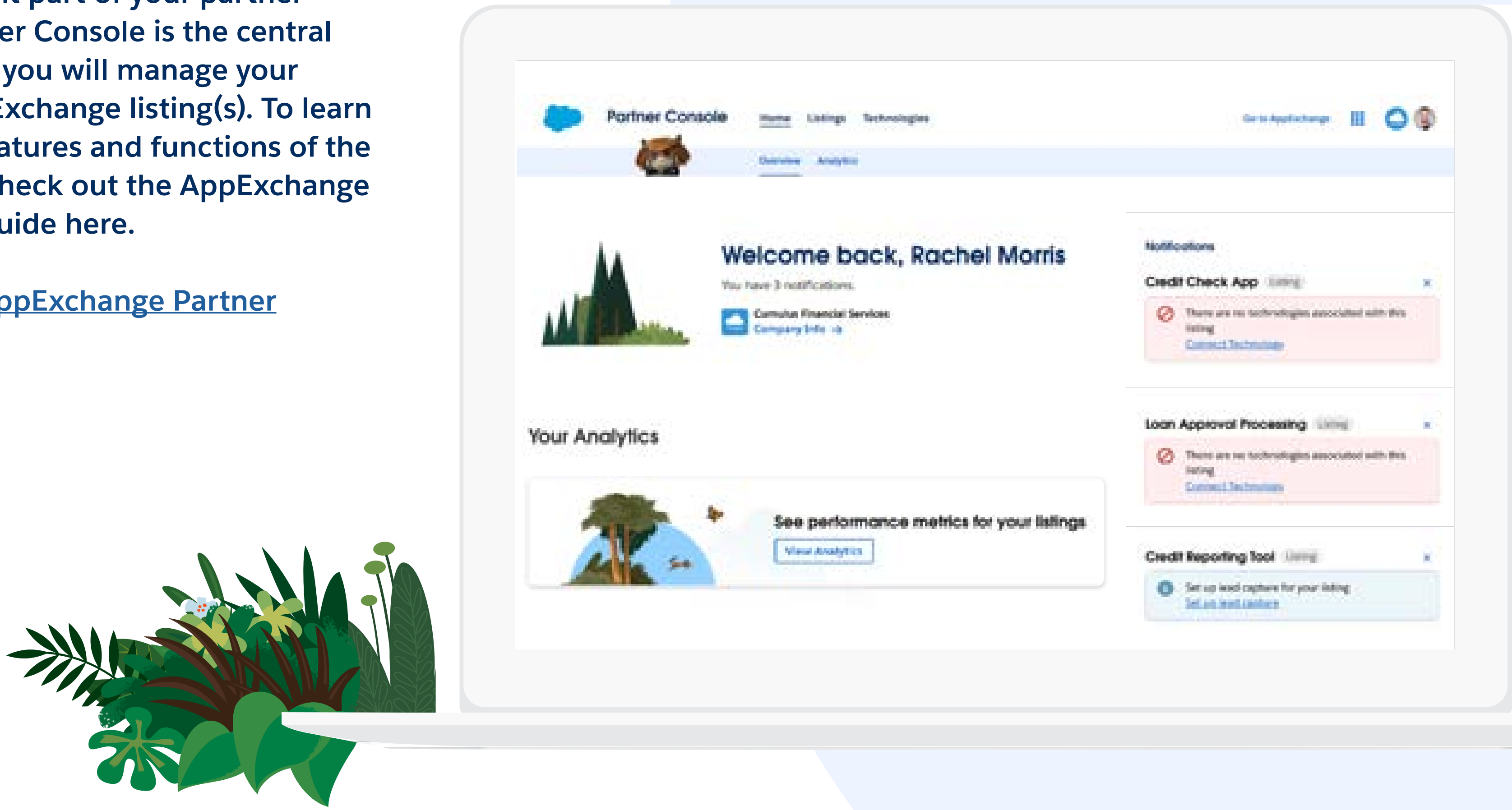
1. Join Partner Community
2. Build Your Solution and Prepare for Security Review
3. Create Your Listing
4. Get Business Approval
5. Publish Your Listing

Note: this onboarding guide applies to all ISV partner types except for Tableau partners.

Get to know the AppExchange Partner Console

As you read this onboarding guide, you'll see the Partner Console mentioned several times as it is an important part of your partner journey. The Partner Console is the central destination where you will manage your business and AppExchange listing(s). To learn more about the features and functions of the Partner Console, check out the AppExchange Partner Console Guide here.

Get to know the [AppExchange Partner Console](#).



1

Join Partner Community

The first step to becoming an AppExchange ISV partner is joining the Partner Community–the hub for all Salesforce partners and gateway to unlocking your partner program benefits. Within the Partner Community, existing and prospective ISVs can access partner resources, log support cases, register for partner events, join forums, and more. Keep in mind that your partnership agreement must be signed to be considered an official AppExchange ISV partner.

Joining the Partner Community:

If you don't have exisiting Salesforce account credentials

Note: If you have already an existing Salesforce username please go to [Join the Salesforce Partner Program (If you have existing Salesforce account credentials)] in this guide. If you are an existing customer, we recommend that you do not use your SFDC customer credentials and instead create a net new Salesforce username for your partner instance.

1. Go to partners.salesforce.com
2. Click "**Become a Salesforce Partner**"
3. Click "**Continue to sign up**"
4. Click "**Join the Partner Community**"
5. Click "**Get a Salesforce Username**" *(attention: this is not the default button)*
6. **Fill out the form** and click "**Create Username**"
   - A confirmation window will appear saying that your user name (email address) is good to go. Move to the next step. You will return to this window shortly.
7. Once you've created your unique username you'll receive confirmation to the email address provided.
8. Click the **link within your email** confirmation to **create a permanent password** and verify your Salesforce account.

   Note: This will establish a 12-month trial Salesforce Enterprise Edition for you - called the Partner Business Org (PBO) - which you can access/log in with your new Salesforce account. This is a 12-month trial edition of Salesforce. Once you execute your partnership agreement you are eligible for two free Sales Cloud licenses.

9. Go back to the sign-up screen on partners.salesforce.com and click on **"I have my Salesforce User Name - Join the Partner Community"**

10. On the "Log In" screen, enter your **new Salesforce account credentials** and click **"Log In"**

11. On the "Allow Access" screen: Click "**Allow**"

12. On the "Join the Partner Community" screen: Click "**Join Partner Program**"

13. You will be redirected to the Signup home page. Complete 3 step process by clicking the **Start button** next to "Join the Salesforce Partner Community"

14. The Partner Application Form appears: **Fill out the form**

15. At the bottom of the form, you'll be asked for your Business Intent. This is where you select the type of partner you want to become. Select **ISV** and click **Next**.

Note: ISV stands for for "Independent Software Vendors" that develops commercially available software solutions built on or integrated with Salesforce.

16. Then select **your specialization from the dropdown**, and click **next**.

17. You are prompted with the Salesforce Partner Program Agreement (SPPA): Read and agree to it by **checking off the two boxes** and click **Next**

18. You are prompted with your completed Partner Program Application: **Review it** and if it looks good, then click **Finish**.

19. After submitting your application, you will receive two emails:

- **First email** - acknowledging receipt of your application
- **Second email** - once your application has been accepted and access has been granted. Please expect a response within a few days while our teams review and process your request.

20. Once you receive the second email, please continue with creating your Trailblazer.me credentials. You will need this information in order to login to the Partner Community.

Joining the Partner Community:

If you have exisiting Salesforce account credentials

1. Go to partners.salesforce.com

2. On the "Partner Community" page: Click"**Become a Salesforce Partner**"

3. On the "ISV Partner Type" window: Click "**Continue to sign up**"

4. On the "Join the Salesforce Partner Community" window: Click on "**Join the Partner Community**"

5. On the "Join the Salesforce Partner Community" window: Click on "**Log In with Salesforce**" or "Log In with Marketing Cloud" depending on the kind of user account you wish to use.

6. On the "Log In" screen: Enter your **Salesforce account credentials** and click Click "**Log In**"

7. On the "Allow Access" screen: Click "**Allow**"

8. On the "Join the Salesforce Partner Community" screen: Click on "**Join Partner Program**"

Note: Do NOT click "My Company is Already a Partner" as we assume this is a net new company signup.

9. You will be redirected to the Signup home page. Complete the 3 step process by clicking the **Start button** next to "Join the Salesforce Partner Community"

10. The Partner Application Form appears: **Fill out the form**

11. At the bottom of the form, you'll be asked for your Business Intent. This is where you select the type of partner you want to become. Select **ISV** and click **Next**.

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ISV partner specialization	Description
OEM Partner	Distributes a standalone solution that combines the Partner Application and a Salesforce license to new and/or existing Salesforce customers. This requires the Partner to pay fees to Salesforce in connection with the distribution of the combined solution.
Data Cloud Partner	Develops an application or integration designed to enhance Salesforce CDP through additional functionality or data integrations.
Commerce Cloud Partner	Develops an application or integration to complement Salesforce Commerce Cloud's portfolio of offerings combined with their products or services.
All Other Clouds - Paid	Distributes a paid application to existing Salesforce customers where the applicable customer can install and/or access and make full use of all the features and capabilities of the application by paying a partner fee.
All Other Clouds - Free	Distributes a free application to existing Salesforce customers where the applicable customer can install and/or access and make full use of all the features and capabilities of the application without paying Partner fees of any kind.
Tableau - Technology Partner	Build integrations to enhance the experience of Tableau Desktop and/or Tableau Cloud. This onboarding guide does not apply to Tableau partners.

Create your Trailblazer Account

After receiving access to the Partner Community, you will be directed to log in. To log in, you will need Trailblazer ID credentials. If you are logging into the Partner Community for the first time without Trailblazer ID credentials, follow the below steps:

1. Go to partners.salesforce.com

2. Click "**Log in**" at the top right corner of the Partner Community home page.

3. You will see a screen that asks you to log into your Trailblazer. me account. Click **"Log in"**.

4. You will then be directed to a page that says "Howdy Trailblazer! Let's get you logged in." Click "**Salesforce**" and then **log in with your Salesforce credentials**.

5. Because you don't have a Trailblazer account yet, you will see a window that says "We couldn't find you".

6. Click "**Sign up using Salesforce**" to create your Trailblazer account

7. Complete your profile

8. Then you'll have the option to connect a recovery account. You can click "**Skip for now**".

9. You'll be directed to the Partner Community home page and you'll be all set with Partner Community access.

10. From now on, you can log into the Partner Community using your Trailblazer account.

2

Build Your Solution and Prepare for Security Review

You can start the AppExchange ISV onboarding process with, or without, a fully developed ISV solution. Whether your solution is in the early or advanced stages of development, be clear on the architecture and ready to provide this information to the AppExchange ISV team to review.

When building, please keep in mind that you're responsible for implementing and maintaining a comprehensive security program and maintaining the security of all applications that you list on AppExchange or distribute under the AppExchange Partner Program. Details on the requirements for Security Review and the process for submitting for Security Review can be found in the AppExchange Partner Console Guide.

These are general requirements applicable to all AppExchange partners and partner applications. When you create or edit an AppExchange listing, you're required to confirm that you've complied with the requirements.

Additional resources:

How to Submit for Security Review: Watch this video to walk through the entire submission process step by step.

Security Review Overview: To distribute a managed package, Salesforce Platform API solution, or Marketing Cloud API solution on AppExchange, it must pass our security review. Learn how to prepare for and pass the security review.

Build Apps as an AppExchange Partner: This trail will guide you through the key concepts andtools you need to build and sell your solution with the AppExchange Partner Program.

Select an App Type: Learn how to choose the correct app type you want to build for your customers.

Everything You Need to Know to Build a Great AppExchange App: This blog post provides a brief overview of the many tools and resources available to help you build a secure, scalable, and profitable AppExchange solution for your customers.

Meet with a Platform Expert to Get Technical Advice: As an AppExchange ISV partner, you get access to technical consultations with Salesforce Platform experts to receive architecture guidance and get insights into key product topics.

AppExchange & ISV Technical Enablement collaboration group (login required): Interact with other AppExchange ISVs and our ISV Technical Evangelists in the Partner Community.

3

Create your listing

The Listing Builder is the home to all of your AppExchange listing needs. It's where all Salesforce partners go to build and edit their AppExchange listings for packages and solutions distributed through the AppExchange ISV Partner Program.

In this step, we will outline how to begin the listing creation process, which includes Fill in the Basics. You can also read more detailed instructions on how to publish your AppExchange listing here.

To navigate to the Partner Console, go to the Salesforce Partner Community and click on the Publishing tab. Once you are in the Partner Console, head to the Listings tab via the top navigation bar.

1. Click on "New Listing +" to open the Listing Builder

2. You'll be prompted to choose a listing type: Packaged Solution, API, or Consultant.

- If you select a package or API, you will be instructed to select a Package or API type.
- You'll be prompted to select which AppExchange site your listing is published to, AppExchange or AppExchange Japan and will be displayed in the respective language. Please choose carefully. If a selection is made in error, you cannot edit the listing and you must create a new one.

3. After you've selected the listing type, you'll be guided through five steps to complete upon publishing:

- Fill in the basics
- Set pricing (not applicable to Consultant listing types)
- Add details
- Link your solution (not applicable to Consultant listing types)
- Grow your business

Fill in the basics

Listing title: We recommend using your solution's name as the title. This is one of the first elements customers see on your listing.

Brief description: Use this section to provide a high-level view of what your solution does/what services you offer. Describe the types of pain points you can solve and what sets you apart.

Solution specifications: You will be instructed to fill out important information about your solution such as product requirements, supported features, and languages. You'll also be able to select your target user, supported industries, and choose from 48 categories for effective discovery of your listing on AppExchange.

Additional requirements: This section is a free text field that allows you to include other product requirements and important information that isn't already shared in the previous fields.

Your contact information: This information will be used to contact your company if we need to reach out about your listing. Please fill out this section in its entirety to contact an active and relevant contact.

4

Get Business Approval

After you start the listing creation process and share basic company information, it's time to set your pricing and get approved. Sharing pricing on your listing helps you be transparent with customers and shares features of your app that they might not be aware of. Once you submit for business approval, the AppExchange ISV team will review your information and reach out to discuss a Partner Application Distribution Agreement (PADA).

The Partner Application Distribution Agreement (PADA) process is different for every prospective partner and is influenced by factors like technology use cases and business go-to market strategy. The AppExchange ISV team will work with you to align on the appropriate Salesforce commercial arrangement based on eligibility–either a standard revenue share model or a fee structure based on projected customer volume.

Note: An executed Partner Application Distribution Agreement (PADA) is required to publish your listing.

Set pricing

When you get to Price Your Solution, you will see that there are four pricing models to choose from that best represent your listing, giving customers better insight into what they will or will not be charged for:

Paid: Customer must pay to use this solution.

- If you select "Paid," you will have the option to select "Checkout" or "Other" for payment management method. In "Checkout", Salesforce manages the billing, payment collection, and subscriptions (via Stripe integration). By choosing "Other", you agree to manage the billing, payment collection, and subscriptions, and you must use the Channel Order App (COA) to report revenue to Salesforce.

Paid Add-On Required: Customers must pay for a product or service that is external to Salesforce for this solution to work.

- If you select "Paid Add-On Required" you agree to manage payments yourself. That means you will collect payment directly from your customers, use the Channel Order App (COA) to report all customer orders to Salesforce, and pay Salesforce as described in your Partner Application Distribution Agreement (PADA), or previous version of that agreement.

Freemium: Customer can use this limited solution for free, but must pay to increase usage, users, or features.

- If you select "Freemium" you agree to manage payments yourself. That means you'll collect payment directly from your customers, use the Channel Order App (COA) to report all customer orders to Salesforce, and pay Salesforce as described in your Partner Application Distribution Agreement (PADA), or previous version of that agreement.

Free: Customers can fully use this solution without payment or partner collecting fees of any kind.

- If you select "free" you will simply be sent to the next section of the Listing Builder which is "Get Approved"
- Ensure your application meets our program policies to be free as mentioned on page 13 here.

Solution Pricing Details

After selecting your pricing model and payment management method, you can add your solution pricing details which include the plan name, price/currency, units (how your plan is priced), the frequency of your billing cycle, and trial length (ifyou are offering a trial period before purchase). If you're using AppExchange Checkout to manage customer payments for this listing, you must first connect to Stripe before entering your pricing details. (Instructions on how to connect below).

Please note: Custom units are not applicable for Checkout listings as billing is managed by AppExchange (via Stripe) and checkout only supports provisioning of licenses per user or per company.

You can also add multiple pricing plans to your listing. They are available for paid, freemium, and paid add-on required pricing models. If a pricing plan is tiered and you only want to indicate the starting price for that plan, then select "Starting Price" checkbox.* This displays a starting price label for the respective plan on the listing page on AppExchange. Make sure to list your pricing plans in the order of how you'd like them to be displayed on your listing. The first pricing plan on the list will be displayed at the top of your AppExchange listing.**

**The Starting price checkbox is only applicable to non-checkout pricing plans*
***For checkout listings, this is the first active (i.e. non-hidden) pricing plan*

Checkout Partners: How to Connect to Stripe

If you decide to use AppExchange Checkout as your payment management method, you will need to setup a Stripe account. Once you get to "Stripe Pricing Plans" simply click on "Connect to Stripe" to create an account and/or connect your Stripe Account.

Once connected to Stripe, pricing plans can be created in the Partner Console and synced to Stripe. Once created, click 'Save and sync plans'. This will save all changes made to the listing and sync the plans to Stripe. Once synced, pricing plans can be "shown" or "hidden" (note: delete option for synced plans is not available as Stripe doesn't provide the option to delete pricing plans). Before syncing to Stripe, pricing plans can be saved with the listing as draft and deleted. You must have a managed package, that's been registered with their License Management Org, linked to your listing before publishing.

Checkout Partners: Managing Trials

Partners can choose to collect payment information from customers either before or after installation (i.e. trial period) in production. For payments collected before installation, free trial duration can be set for each pricing plan. These trial periods are managed at the subscription level by Stripe.

For payments collected after installation, free trial duration can be set up for each package version by registering the package version in the technologies section. The free trial will apply by default for the licenses created in LMA upon installation. The customer can then buy from their "My Installs & Subscriptions" page or reach out to the partner asking to extend the trial period for their license if needed.

Solution Pricing Details

Fill out this section to describe limitations your solution might have that customers can pay to remove. For example, the solution supports a maximum of 10 users.

For Freemium plans, partners must describe the limitations up to which the listing is free.

For Paid Add-On Required products, partners must describe the products or services that customers must purchase to use their solution.

Additional Pricing Details

Describe pricing for customers who want to convert from the freemium version. Lastly, you may check a box signaling to customers that your company offers discounts to nonprofits and nongovernmental organizations.

Get Approved

Once you fill out the required fields in "Fill in the Basics" such as your title and pricing details, you may submit your listing for Salesforce approval. We will check that the title meets our partner branding guidelines and your pricing model aligns with the program policies. If the pricing model you chose is paid, freemium, or paid add-on required, the ISV sales team will reach out to initiate the Partnership Application Distribution Agreement (PADA) contracting process.

Making Changes to Submitted or Approved Listings

While you are awaiting approval from the ISV sales team, you may continue making edits to your listing. However, if one or more of the following items are changed on your listing while it's in review, has been submitted or approved, you will be prompted to re-submit:

- Pricing model
- Payment management from checkout to non-checkout
- Payment management from non-checkout to checkout
- Updating unit in an existing pricing plan

Once you've been approved, you can take the next steps below depending on your payment details:

- **Non-checkout listings:** An approval message will appear and you can proceed to publish as long as the other required fields and security review are complete
- **Checkout listings:** You will be prompted to click through the Partner Application Distribution Agreement (PADA) and may proceed to publishing after signing

Once you sign your partnership agreement, you are a formal AppExchange ISV partner and can activate your trial PBO by logging a case. We recommend activating it as soon as possible to prevent your trial PBO from expiring, resulting in potential data loss. It is important to have a firm grasp on the PBO and the tools available to help you along in your journey. Check out everything you need to know about your PBO, **here**.

Please note that listing approval is not required to continue working on your listing. This is only necessary in order to be able to publish.

5

Publish your listing

Once you've received security review approval, business approval, and confirmed your pricing, you may proceed with publishing your listing.

See below for the last few steps that must be completed in order to go live on AppExchange.com. For more detailed steps on publishing your listing, please review the Publish your AppExchange listing section in The AppExchange Partner Console Guide.

Add details

When you get to Add Details, it's time to include the messaging and visuals you will share with your customers on your listing. These items include your SEO title, tagline, full description, highlights, terms and conditions, visuals, demos, and more.

Link your solution

In this step, you must link the solution to your listing so that your customers can access it easily. Keep in mind that you must have already added your solution in the technologies section of the Partner Console to link it to your listing.

Link your solution by going to the Technologies tab > Solutions > Connect Technology +. For solutions that are pending security review, a warning will be displayed as the listing cannot be published until security review is complete for the solution linked to the listing.

There are **three** options to choose from:

1. Install from your AppExchange listing (Recommended)

- If you select this option, you must link your package and select a version. This package must pass security review before the listing can be published.

2. Install from your website

- Select this option if your solution is a downloadable client or requires more installation details. By selecting this option, you must provide a URL which the prospect will visit for obtaining the solution.

3. Contact details for your installation

- If customers need your hands-on assistance to install your solution, have them contact you. Installation from your listing is the fastest way to get your solution in customers' hands, and we recommend this option for most partners. If you use AppExchange Checkout to collect payment, you must select this option.

Once you've linked your solution, it will now be available to customers when they purchase your product from your listing.

Grow your Business

This step allows you to enable free trials on your listing so customers can experience your solution up close. You can also enable lead collection when customers interact with your listing to learn who's interested in your solution.

Free trials: A free trial lets customers experience your solution in a setting that they can tinker with and customize. Free trials are created from Trialforce templates, which contain your solution and sample data. Customers launch free trials from your AppExchange listing, and access them with unique credentials.

Note: You can only add trial templates that are associated with the orgs you connected to the Partner Console.

Leads: If you enable lead collection for your listing, customers are prompted to fill out a contact form when they interact with a demo video, sign up for a free trial, and/or install your solution. Info collected from the form, combined with customer activity data, is shared as a lead. You can decide which interactions trigger lead collection. By enabling this action, you must select an org to which the leads must be sent.

Publish your listing

After Grow Your Business, you'll reach a page that shows all pending tasks that require completion before your listing can get published. You can click into each step to complete each remaining task. Once complete, simply click "Publish" at the bottom of the page to go live with your listing.

Congratulations! You have completed all of the steps to publish your listing. Once your listing is live on AppExchange, you can start your marketing and selling motions to drive new business.

General resources

[Partner Program Overview Page](#)
Learn more about the Partner Program and the benefits partners receive at each tier.

[Sign up for Salesforce Partner Communications](#)
Opt in to receive partner email communications related to your Salesforce Partner Program.

[AppExchange Checkout](#)
Learn how Checkout helps you manage online payments and monitor sales for your solutions with this trailhead module.

Note: Checkout is not ideal for all partners. Once you thoroughly complete milestone three (Prepare Solution Documentation), the AppExchange ISV team can accurately advise if Checkout is right for you.

[ISV Operations Curriculum](#)
This series on Partner Learning Camp teaches you how to use tools such as the License Management Application (LMA) and other strategies to increase the efficiency and organization of your solution development and business.

[ISV Go-To-Market Guide](#)
This step-by-step guide details before, during, and immediately following the launch of your solution. With various resources and insights outlined throughout the e-book, you'll gain access to the knowledge necessary to continue to grow your business with Salesforce.

[How to Win Your First Customer and Beyond](#)
Join this self-guided journey to learn how to prepare, and successfully execute, a go-to-market strategy with Salesforce.

[Grow Your Business as an AppExchange Partner](#)
Take this trail to learn how to manage your business and help your customers thrive with your AppExchange products.

Partner Business Tools

Listed below are some critical partner business tools you'll use to manage your business. Take **this trail** to learn about all tools to plan, build, distribute, sell, market, and support your application.

- **License Management Application (LMA):** Learn how to 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.
- **Environment Hub Tools & Processes:** Learn how to set up and configure your environment hub, create and view new orgs, and more.
- **Trialforce:** Seamlessly deliver free trials to your customers with a free trial of your AppExchange solution.

Listing Type Definitions

Salesforce Native

A solution, built entirely on force.com with Lightning Web Components, delivered exclusively via a managed package and distributed on the AppExchange. Lightning Web Components are the building blocks for making apps and customizing pages in Lightning App Builder with drag and drop. Paid components are required to leverage AppExchange Checkout.

Composite

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

API-Only

A solution that works with the Salesforce Lighting Platform and core products, but doesn't need or use a managed package. These solutions don't have any partner intellectual property on the Lightning Platform. Solutions of this type integrate with the Lightning Platform exclusively through standard Lightning Platform APIs (e.g. SOAP, REST, Bulk).

Developer Tools

Everything You Need to Know to Build a Great App

Exchange AppLearn about the many tools and resources available to help you build a secure, scalable, and profitable AppExchange solution for your customers.•

Developer Experience | Salesforce Developer Center

Explore developer tools you'll use to build your solution.

Second-Generation Managed Packages

Learn how to distribute your AppExchange solution using our latest packaging technology.

Questions?

AppExchange & ISV Technical Enablement Collaboration Group

Post your technical onboarding questions in this Partner Community group.

Log a Support Case

For Salesforce Partner Program support please log a case.