The AppExchange Partner Console Guide

WELCOME TO

The AppExchange Partner Console guide

From building to listing your app, the AppExchange Partner Console gives you visbility into every step of the process so you don't miss a beat. In this guide, we give you an overview of the console, highlighting all of the features and functions you need to know. We'll also dive into every process you can manage within the console with step-by-step directions. From linking your solution(s), to building an AppExchange listing, we'll be there with you every step of the way.

How to use this guide

No matter if you're new to the ecosystem or an AppExchange pro, this guide is a great reference to the features, functionalities, and processes that the AppExchange Partner Console provides. Feel free to start from the beginning or jump to the most relevant section for where you are in your journey.

**Please note: some features in the guide may be labeled as "Coming soon". We are continuously working on the Partner Console to provide you with the best experience.*

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SECTION 1

Get to know the Partner Console

As a partner, the AppExchange Partner Console is the #1 destination to manage your business daily. In the console, partners can do everything - create a listing, track the security review process, analyze listing performance data, and more.

How do you access the Partner Console?

To access the Partner Console you must have Partner Community access. If you don't already have access please refer to this onboarding guide on how to join.

Now that you are now in the Partner Community, you can access the Partner Console from the publishing tab.

PRO-TIP: BOOKMARK THE PARTNER COMMUNITY TO HAVE EASY ACCESS TO THE PARTNER CONSOLE.

How do you use the Partner Console?

When using the Partner Console, you notice three things - it is an easy, intuitive, and transparent experience. We want you to have the best experience when managing your business, and that's why the console is designed with a partner lens in mind. What does that mean?

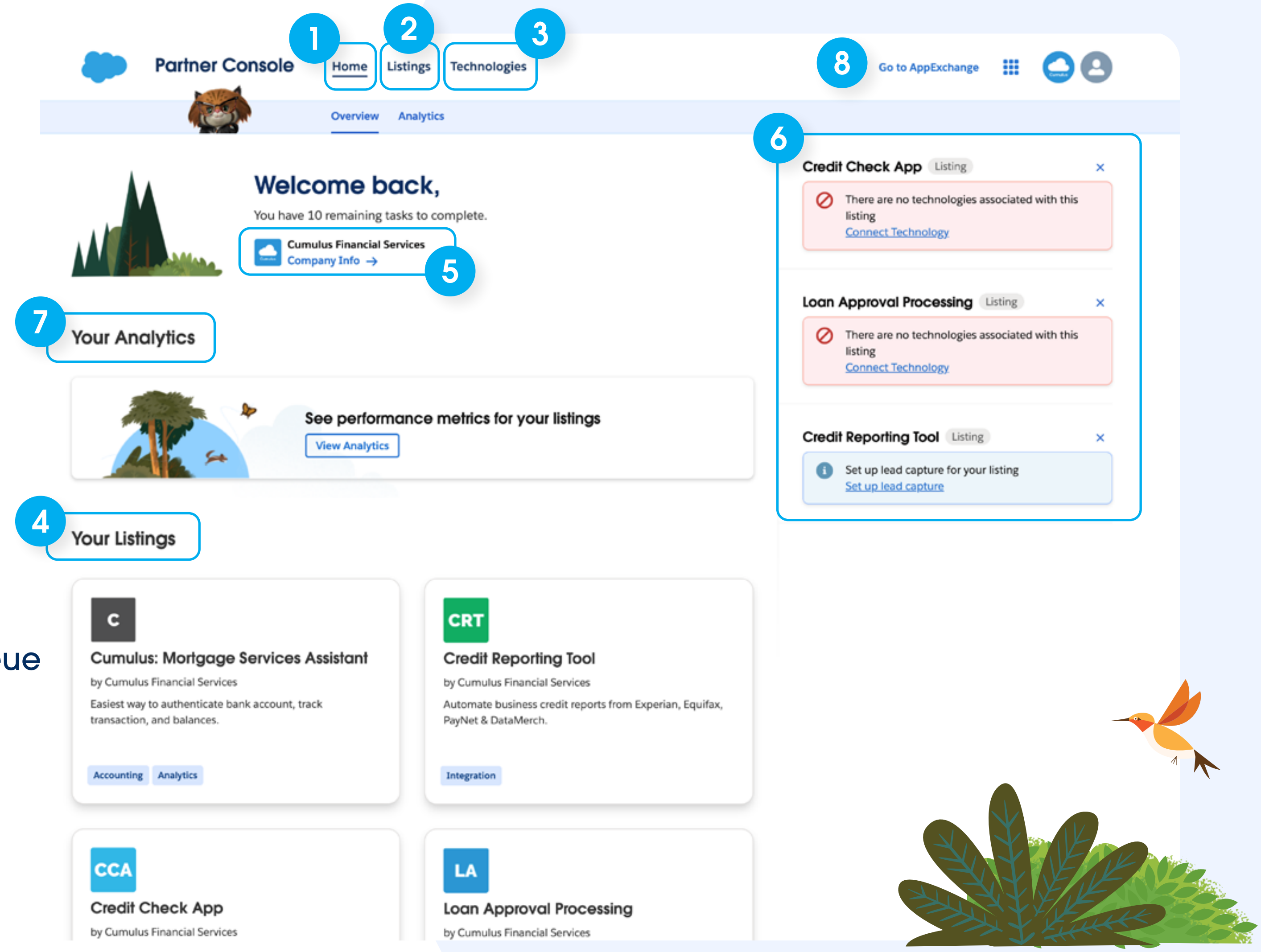
Within the Partner Console you can:

- Manage company information.
- View and take action on notifications served on the home page.
- View listing performance metrics.
- Create, remove, and manage AppExchange listings.
- Track progress on your listings.
- Submit for security review for Salesforce Platform packages, Marketing Cloud API solutions, and Salesforce Platform API solutions.
- Connect new packages, API solutions, Trial Templates, and orgs.

The Partner Console home page

In this diagram we cover the most important components you will find in the AppExchange Partner Console, what they are for and how to use them.

1. Home
2. Listings Tab
3. Technologies Tab
4. Your Listings
5. Company Info
6. Publisher Notification Queue
7. Marketplace Analytics
8. Utility Navigator



1 Home

Click here to go back to the Partner Console home page.

2 Listings tab

Navigate to the Listings home page where you can create, edit, or view all of your listings in one place.

3 Technologies tab

The Technologies tab is organized into two sub tabs; Solutions and Trial Templates. In this tab, partners are able to connect new solutions and start the process to publish them on AppExchange for customers to adopt.

4 Your Listings

Preview of your four most recently modified AppExchange listings via a collection of publishing cards. Each publishing card displays your external facing listing title, brief description, small logo, and categories. Click into each card to jump directly to the Listing Builder to edit that particular listing. You can also click on "View All Listings" to see both published listings and those that are still in progress.

5 Company Info

Clicking here takes you to a page containing your company's key brand details and contact information. Use this section to input/edit your company details, logo, description and other basic company information that will be on your listing.

6 Publisher Notification Queue

This is your "to-do list" in the Partner Console. In the Publisher Notification Queue, you will find a consolidated list of business notifications that need your attention for your listing, technologies, security review, and more. The types of notifications that will appear, according to your activity, fall into four categories: Informative, Warning, Error, and Success.

Informative: Helpful suggestions on how you can improve your listing.

- *Example:* You don't have a lead capture org set up for your listing.

Warning: An alert that signals an existing issue or a challenge you could encounter in the future. If you have a warning notification, you may not be able to proceed with publishing your listing.

- *Example:* You don't have a technology associated with your listing or your technology still requires a security review.

Success: A message confirming an action has been completed.

- *Example:* Your listing is live or you have successfully passed security review.

Error: The completion of a task has failed.

- *Example:* A security review has failed and you will need to resubmit.

These notification types help you identify what exactly needs to be done to complete an outstanding task or what needs your review.

7 Marketplace Analytics

The Marketplace Analytics dashboard uses metrics, trends, and visualizations to show how customers find and interact with your AppExchange listing. On the Partner Console home page, you'll see an Analytics' sub-tab, which takes you to the dashboard.

8 Utility Navigator

The Utility Navigator gives you easy access to the Partner Community, Trailhead, Trailblazer Community, ISV Dev Center, Events, and Salesforce Help.

The Partner Community: Your one-stop shop for education, enablement, and engagement. Learn how to plan, design, build, sell, and market your apps or services, collaborate with other partners, discover new features, products, and programs.

Trailhead: Follow a guided learning path with fun interactive tutorials and earn badges.

The Trailblazer Community: Connect and get answers from a passionate community of experts.

ISV Dev Center: The AppExchange Developer Center is a modern, curated information hub designed to help partners build solutions faster using the latest Salesforce technology.

Events: View and register for upcoming Salesforce events, in-person or virtually.

Salesforce Help: Search documents, videos, resources, and log a case for help.

SECTION 2

Link your solution to the Partner Console

In this section, you will learn how to use the Technologies tab to manage your solutions and trial templates, submit each solution for security review and register the package with License Management App (LMA) in your Partner Business Org (PBO).

Navigate to the Technologies tab in the Partner Console to connect your packaging org. Then you'll see all the solutions and trial templates available in that org, within the technologies section.

What is the Technologies tab and how do you use it?

The Technologies tab is organized into two sections; solutions and Trial Templates.

Solutions:
This is the one stop for partners to see all packages, API solutions, trials, and orgs. Partners can connect new solutions and start the process to publish it on AppExchange for customers to adopt. When linking a new solution you are given the option to link a packaged solution, an API solution, a trial template, and an org. Depending on what you select you will follow different instructions but all of them will end up listed on the Technologies tab. It is also the place where you can submit to register the package with License Management App (LMA) in your Partner Business Org (PBO). Please note, package registration is required for listings that use AppExchange Checkout to manage customer payments.

To learn more about Checkout go to the listing builder steps under the **'Publish your AppExchange Listing'** section in the guide.

When linking a packaged solution or trial template, you are immediately led to connect to the org where it lives, connect to the org where your solution or trial template lives in order to then submit for security review and publishing it on AppExchange. Please note, API solutions require manual entry to the link where the live app exists. For instance, B2C Commerce ISV Partner will provide a code repository link for their B2C Commerce cartridge or headless integration.

Trial Templates:

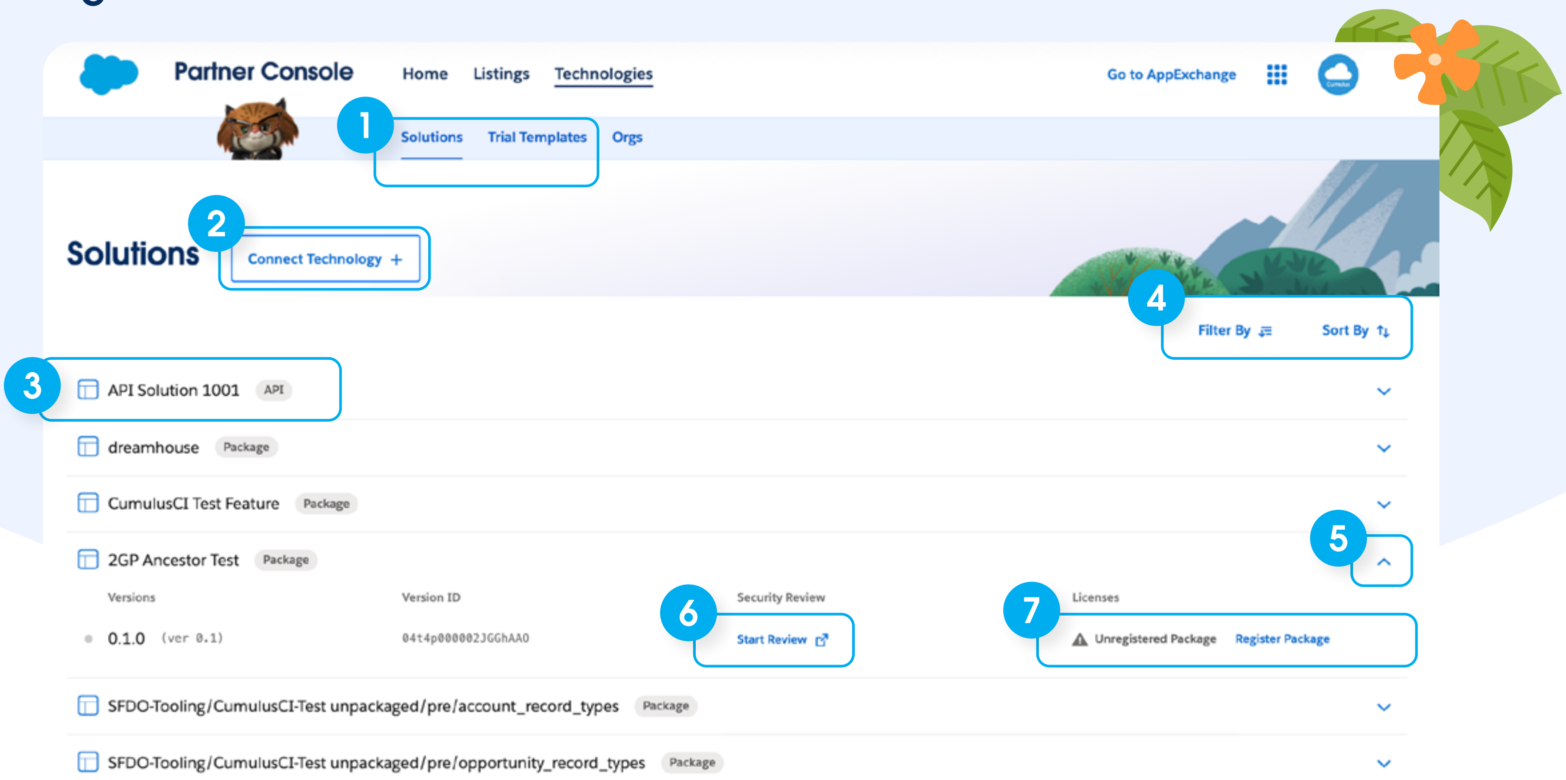
As mentioned above, the Technologies tab has a section for trial templates. Trial templates are used to create trial orgs which interested customers can use to test your solution.

When customers visit your listing, they can start a free trial with your offering pre-installed. To link a trial template to your solution, go through the Solutions tab or through the Trials tab. We encourage you to offer trials for your solutions and use it to drive leads to your pipeline.

To link your trial templates to the Partner Console, connect your org after selecting ‘Trial Templates’. Once you click on “connect your org” you will be prompted to sign in to the org where your trial template lives. Once your org is linked, you will see a list of trial templates associated with that org in the Trial Templates tab.

Now that we know what the solutions and trial templates tabs do, let’s go through the step by step on linking two solution types; Packaged solution, and API solution.

The Technologies tab



1. Sections under the Technologies tab - Solutions, Trial Templates and Orgs.

2. Click Connect Technology to connect solutions, trial templates, and orgs to the Partner Console.

3. Name and type of solution (i.e: API Solution 1001, API).

4. Drop downs to filter and sort solutions by type and security review status. You can also sort solutions by creation date or name.

5. Dropdown arrow to open the versions under that solution.

6. Click on 'Start Review' for the version you are ready to submit for security review.

7. License registration for managed packages and configuring default license behavior.

Please note that you can also create API solutions, link Quip apps and B2C Commerce Cartridges. Once solutions are created or linked via the Technologies tab, you can link them to their listing type in the Listing Builder.

How to link a Salesforce package to the Partner Console

1. Navigate to the Technologies tab in the Partner Console.

2. Click "Connect Technology +".

3. From the following solutions, select Packaged Solution.

- ***Packaged Solution***
- API
- Trial Template

4. From the following solutions, select the Packaged solution.

- ***Salesforce Platform Package***
- Quip *(provide the link to wherever the quip live app exists)*
- B2C Commerce Cartridge *(provide the URL for your B2C Commerce Cartridge)*

5. Click "Connect your org".

6. Log into your org.

7. Once connected, the solutions in that org will show up under the solutions sub tab under the Technologies tab.

8. Navigate to the Solutions tab.

9. Click on the package or the dropdown on the right end of the package row to open all versions of that package.

10. Click "Start Review" for the package version you are ready to submit for review.

- The "Start Review" step will only appear for solution types that require a security review. Refer to the **Security Requirements** for detail about what solution types require a security review.

11. Follow the steps to submit for security review (steps documented on the '**Managing the security review process**' of the guide).

How to add an API solution to the Partner Console

1. Navigate to the Technologies tab in the Partner Console.

2. Click "Connect Technology +".

3. From the following, select API.

- Packaged Solution
- ***API***
- Trial Template

4. Select from the options below:

- Salesforce Platform API
- Marketing Cloud API
- Headless Integration for B2C Commerce

5. Insert the the API name/link.

6. Navigate to the Solutions tab to find the linked solution.

7. Click on the API solution

8. Click "Start Review" to start the process to publish your app

- The "Start Review" step will only appear for solution types that require a security review. Refer to the **Security Requirements** for detail about what solution types require a security review.

9. Follow the steps to submit for security review (steps documented on the '**Managing the security review process**' of the guide)

SECTION 3

Manage the security review process

If your solution is subject to security review, you must pass the review before it can be listed on AppExchange. Only Salesforce Platform packages, Marketing Cloud API solutions, and Salesforce Platform API solutions are subject to an initial security review. If the review team identifies vulnerabilities, you have access to personalized technical guidance to help identify vulnerabilities. While the solution is listed on AppExchange, it may be periodically re-reviewed to check that it still helps protect against security vulnerabilities.

Common security threats that we test for:

- SOQL and SQL injection
- Cross-site scripting
- Non Secure authentication and access control protocols
- Vulnerabilities specific to the Salesforce platform, like record-sharing violations

Security review wizard overview

You must use the security review wizard to specify your solution details and submit it for security review.

How to use the security review wizard

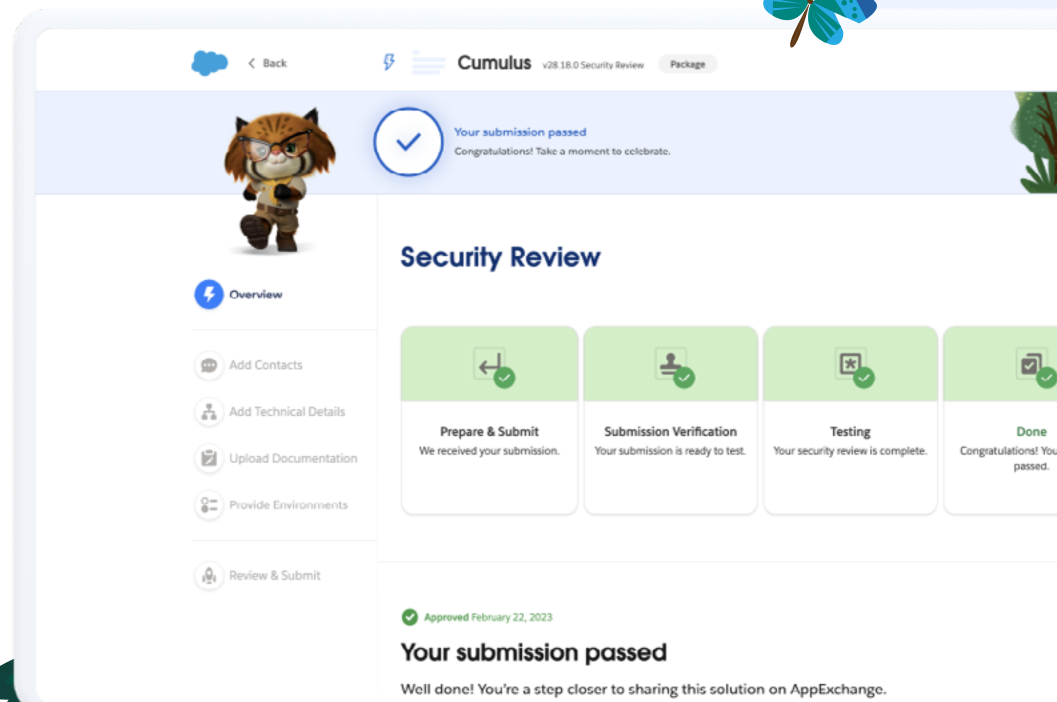
The security review wizard allows partners to upload documentation like preliminary security scans with Checkmarx, ZAP, Chimera, or usage documentation to share with the Salesforce AppExchange product security team for review. Additionally, partners will use the wizard to provide credentials to relevant test environments that pertain to the solution.

Security review wizard benefits:

1. A dynamic security review submission flow that scales with each solution type on AppExchange.
2. Secure and simplified security review payment model to give partners a more effective and scalable fee structure, especially for 1GP and 2GP packages.
3. Status tracking on the Security Review overview page in the Partner Console. Partners can see a contextual status indicator, review failure reports, and view communications with the review team.
4. New versions of approved packages no longer need to be submitted for auto-approvals. You can immediately associate the new version to your listing.

If your solution is subject to security review, follow the steps below to submit your app for review:

1. Navigate to the Technologies tab in the Partner Console.
2. Click “Connect Technology +”.
3. Follow the steps documented on the section “[Link your Solution to the Partner Console]” on page 8 to select and link to the org where your solution lives.
4. Once you connect your solution to the Partner Console, navigate to the Solutions tab.
5. Find the list of your technologies and click “Start Review” for the technology you are ready to submit for security review.
6. Provide details about your solution. Before you can submit for review, you have to fill out all required fields. This section requires all of the basic information about your solution such as technology details, security scan reports, and test environments.
7. Once you’ve completed filling out the security review details, scroll to the bottom and click “submit your security review” and your solution will now be added to the queue to be reviewed by the ops team before being passed on to the ProdSec team.
8. Once your submission is reviewed and ready, you can check your status in the Partner Console.
9. If any action is required after submission, you will receive an e-mail notification. From there, you can review latest updates and details about the status of your submission in the Partner Console.
    - If they return your submission, you will have to make the necessary changes to re-submit and wait to hear back from the ops team. Then, after validating your submission for security review your solution will be sent to the ProdSec team. This entire process can take two to four weeks.
10. The ProdSec team reaches back to either pass or fail your solution’s review.
    - If your app fails the review, you will be provided with the reason why and a list of what to do to fix it before re-submitting.
    - If your app passes, you will see a green check mark that says “Completed - congratulations, your security review has passed”.
11. Once your solution passes security review you can head to the Listings tab and fill out all the details of your listing to publish it on AppExchange.



SECTION 4

Register managed packages

Register a managed package version with License Management Application (LMA) in your Partner Business Org (PBO) from the Partner Console. Package registration is required for listing your solution with the AppExchange Checkout payment management method.

Package registration steps:

Managed package registration is done on a per-version basis. In order to register a managed package version with your License Management Org, take the following steps:

1. Navigate to the desired managed package to be registered under 'Solutions'.
2. Select the version that you'd like to register and click on 'Register Package'.
3. Enter the username, password and security token. This is required to validate that you can authenticate into the org and also that the org contains the License Management App. This information is not stored in the Partner Console.
4. Once you click on 'Register', the credentials are validated and the package is registered with an 'active' and 'site-wide' license configuration as default. The default behavior will get applied when package is installed via AppExchange.
5. Next, you can change the default license configuration by changing the following parameters:
   - (i) License Status - This can be set as Free Trial or Active. If Free Trial is selected, you should enter the length of trial (in days).
   - (ii) License Type - This can be set to Site-wide or Per Seat. If it's set to 'per seat', you should enter number of seats included with the license.

Please note: Although you will configure default license behavior when registering the package, these settings will not take effect if you choose to collect payment before installation when you setup Checkout during listing creation. For payment collection before installation, the trial length will be managed by Stripe, and user count will be based on customer's selection at checkout.

SECTION 5

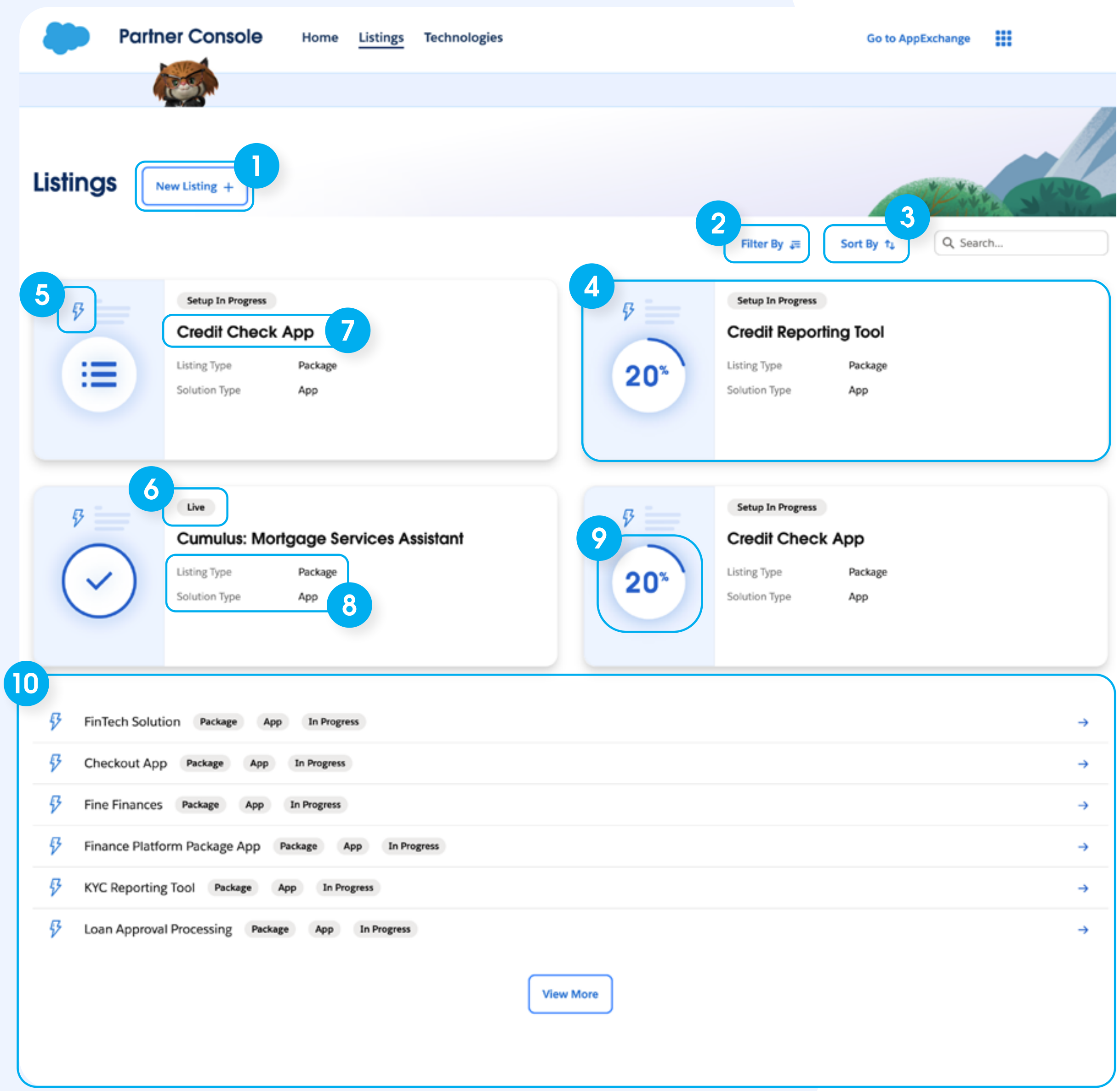
Publish your AppExchange listing

An AppExchange listing is the best way to find and close new business. As today's consumers shop online by reading reviews, product details, and looking at photos, your customers are browsing AppExchange in the same way. They're interested in making a well-informed decision and look at your listing to provide them with answers to their questions.

What is the Listing Builder?

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, APIs, and/or consulting services. To get to the Listing Builder, head to the "Listings" tab via the top navigation bar on the Partner Console home page. There, you'll see one or more of your company's listings to manage (or none if you haven't created a listing yet). The primary view of the Listing Builder page gives you a snapshot of your progress until your listing(s) is ready to be published. If you have several listings, you can filter your view by product type and published status as well as sort them by name, ascending/descending order, date created, and date modified. In this section, we will provide an overview of Listing Builder's features and functionality, and step-by-step instructions on how to create a new listing.

The Listings tab



1. **New Listing**: Click here to begin drafting a new listing for a solution or service.
2. **Filter By:** Narrow down your view by listing type or publishing status.
3. **Sort by:** Re-order your view by sorting your listings by date created or date modified.
4. **Publishing card:** Each publishing card represents each listing from your company with an overview of your listing details and it's progress to completion.
5. **Icon:** Indicates the listing type.
6. **Badges:** Labels that indicate key properties of a listing such as listing type, live or unpublished, and more.
7. **Title:** This text reflects the title customers see on your listing when they visit it on AppExchange.
8. **Metadata:** Information that provides details about the listing such as listing type (For example: The Salesforce Platfrom) and listing type (Application, API, consultant, etc).
9. **Progress:** How far along your listing is from being 100% complete.
10. **Listing list view:** A single file view of all of your company's listings.

How to publish an AppExchange listing:

Step-by-step instructions

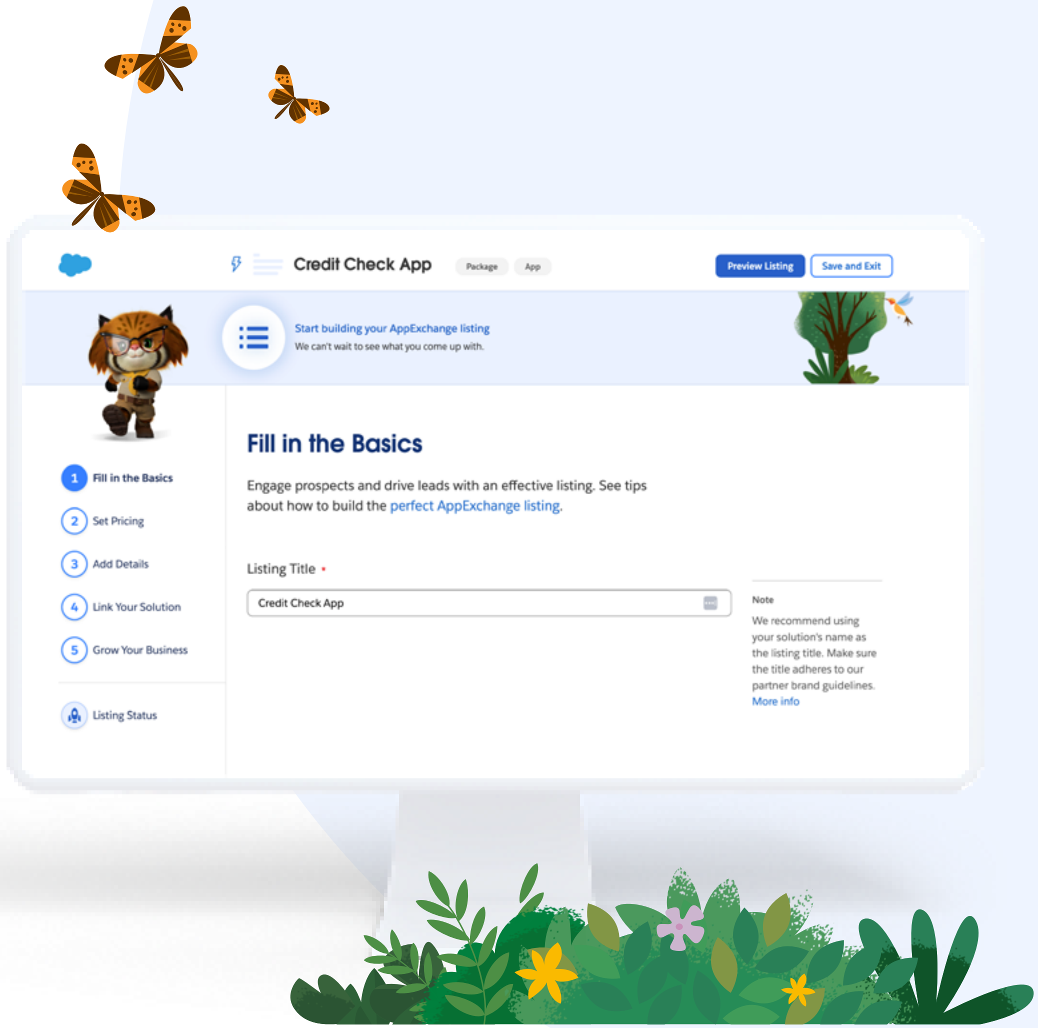
As previously mentioned, your AppExchange listing is your storefront, so it's important to provide as much detail as possible to educate your customers so you can generate leads faster. That's why we've made the AppExchange listing process easy. Guided prompts simplify the listing process, making your experience more intuitive. This allows you to know what to do next and identify what is needed in the future so you can publish your app quickly. Let's get started.

Create a listing

To create a new listing, start by clicking on the "Listings" tab in the top navigation bar of the Partner Console.

From there, click on "New Listing" to open the Listing Builder and begin a new listing draft. 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. Then, 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. After you've selected the listing type, you'll be guided through five steps to complete upon publishing:

1. Fill in the Basics
2. Set Pricing (Not applicable to Consultant listing types)
3. Add Details
4. Link Your Solution (Not applicable to Consultant listing types)
5. Grow Your Business



Once you are in the Listing Builder, there are a few things to note:

- You can navigate through the steps in any order you desire.
- Listing(s) can be built over time and can be saved in a draft state through the use of “Save and Exit”.
- Use the “Back” and “Next” buttons to navigate between steps. However, please note that clicking “Next” does not automatically save your progress.
- You can preview your listing at any time using the “Preview Listing” option.
- Contextual help text is available throughout the Listing Builder and will help guide you through each step.
- Once all required fields in a step are 100% complete, the step indicator will change from the step number to a checkmark. When all five steps are complete, you can publish your listing.
- You must receive both security approval and listing approval before being able to go live on AppExchange.

1 Fill in the basics

This section requires all of the basic details about your company and solution/services.

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 communicate with an active and relevant contact.

2 Set pricing

Sharing pricing on your listing helps you be transparent with customers and shares features of your app that they might not be aware of. The pricing section of the Listing Builder consists of two subsections: **Price Your Solution and Get Approved**. This section only applies to Package and API listing types. If you select "Consultant" when choosing a listing type, this step will not appear.

Pricing your solution

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:

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".

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: Customers 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.

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 (if you 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 also 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 setup 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.

Limitations

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.

Required Services and Products

For Paid Add-On Required partners, fill out this section to describe the products or services that customers must purchase to use your solution.

For example, the customer must purchase consulting services and your external app.

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 offer 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 contracting process.

An executed Partner Application Distribution Agreement outlining revenue share is required to publish your listing.

While this process can take about 30 days, you can always track your listing progress under "Get Approved". See below for next steps once your listing is approved:

- **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 and may proceed to publishing after signing.

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.

Making changes to submitted or approved listings

While you are awaiting approval, 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:

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

3 Add Details

After sharing your basic company information and pricing details, it's time to think about the messaging and visuals you'll be sharing with your customers on your listing.

Describe your solution

SEO Title: Rather than worrying about SEO in your listing title, we've provided a separate field where you can input a search-friendly version for a better customer discovery experience. We recommending including keywords that identify the business problems your solution/services solves as well as related keywords. The more that the search terms align with your listing text, the higher its keyword relevance. Title, tagline, and brief description text are weighted more heavily than other listing text.

Tagline: This is your chance to include a catchy one-liner that encapsulates the benefit of your solution/services. Keep it concise and to the point.

Full description: Expand on the brief description by diving into the business and technical details of your solution/services.

Highlights: Emphasize your solution's main features and benefits by adding up to nine highlights.

Terms and conditions: Share any terms and conditions that your customers must agree to. These apply in addition to the Salesforce Terms & Conditions.

Include visuals

Adding visuals to your listing is just as important as the text. It brings your solution to life and can tell a story that words cannot. Before adding logos and visuals, please review our partner brand guidelines. Also make sure to preview your listing before you publish to ensure that all visuals render correctly.

Small logo: Upload a high resolution static image in JPG or PNG format, 128 x 128 pixels.

Large logo: Upload a high resolution static image in JPG or PNG format, 448 x 328 pixels. Keep this image simple. When a customer views an image, they should understand what they're looking at right away. Avoid photos, wordiness, and complexity.

Allow marketing use: Salesforce sometimes uses marketing campaigns to promote AppExchange and its partners. By selecting "yes," we may include your solution's logo in future marketing materials.

Screenshots and videos: Customers are more likely to interact with listings that have visuals, so ensure you are using all of the space provided to your advantage. Upload your screenshots in JPG or PNG format, at 1500x1000 pixels, under 1 MB.

The images and videos that you upload will be placed in a carousel view where customers can click through your selected media. Once you upload the images and videos, you may select in which order they will appear.

The carousel is the very first element of the listing that people notice because it is the largest and most visual section of an AppExchange listing. This is an important area to focus on when optimizing your listing, because it is what customers interact with the most. The carousel is designed to help you tell the story of your product or services. Ensure your screenshots are placed in an order that helps the customer understand what it is that you do and the value of your product or services.

Because 50% of our ISV listing audience are not admins or have install permissions, it is important to conclude the carousel with an image driving the customer to watch a demo or learn more.

Demo video: By including a link to your demo video, customers will see a "Watch Demo" call-to-action button on your listing. Once they click on it, they will be prompted to share their information with you before being directed to your demo video. By configuring lead collection for this listing (see Step 5: Grow Your Business), Salesforce will send you a lead after a prospective customer watches the demo video. When sharing your demo video, please make sure you are directing customers to YouTube, Vimeo or any other video platform for the best viewing experience. You can see an example video here to refer to as a best practice.

Customer resources: Share up to 15 resources that help customers understand your solution and its features. Upload or link to customization guides, case studies, customer testimonials, and more. When naming your resources, keep search-engine friendliness in mind. Use keyword-rich titles and file names.

4 Link your solution

In this step, you must link the solution that you added in the technologies section. For solutions that are pending security review, a warning will be displayed because the listing cannot be published until security review is complete for the solution linked to the listing. Add a solution to your listing so that your customers can access it easily. 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 you for install instructions
- 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.

5 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.

Please note that 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.

Congrats! 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.

SECTION 6

FAQ & Resources

Marketing

Once my AppExchange listing is published, what can I do to start driving leads?

Check out the **ISV Go-to-Market Guide** to help you maximize your audience reach and help get the word out about the launch of your app.

Where can I find the AppExchange Marketing Program's (AMP) storefront to apply for co-marketing opportunities?

You can find the storefront by finding the "AMP" tab on the main menu of the Partner Community (**click here**). Please note: Only users with "Manage Listings" permissions can apply for promotions. If you don't have access, connect with the Partner Community admin at your company to request "Manage Listings" permissions.

Technical support

How do I get support if I run into a problem with the Partner Console?

The best way to access support is to log a case in the Partner Community. To log a case, click the "?" icon in the top right corner of the Partner Community. Then select "Log a Case for Help." For more information, **click here**.

Business support

Am I able to change the category or industry on my AppExchange listing?

Yes. You can create multiple listings for the same application in the Partner Console when it aligns with multiple industries or categories.

How does popularity ranking work on AppExchange?

Search ranking is based on an algorithm that takes into account the title, description, and other details from the listing entered by the partner in relation to the search term. Therefore, partners have control over search ranking, similar to Google, by adjusting and testing the details in their listings for best results.

Does the Partner Console support A/B testing listing messaging and creative?

The Partner Console does not support A/B testing of messaging and creative elements.

In the event of an acquisition, what is the process to merge or consolidate accounts on Partner Community?

Please log a case for support. For more information on how to log a case, **click here**.

Technical Resources

How to log a support case

The ISVForce Guide

- Learn to plan, build, distribute, market, sell, and support solutions that run on the Salesforce platform

Business Resources

The ISV Onboarding Guide

- Learn how to start your journey as an ISV partner and succesfully deploy your solution on AppExchange.

ISV Partner Hub

- Get a single view of the latest tech and business updates they need to be successful. This page is updated monthly, so make sure to bookmark it and keep checking back to access our top news and events.

ISV Benefits page or Consulting Partners Benefits page

- Check out a summary of all your benefits

AppExchange Marketing Program

- Take advantage of these turnkey paid co-marketing opportunities to help boost awareness and generate demand through the Salesforce ecosystem