APN Customer Engagements Pipeline Manager User Guide

January 2025

Version 17

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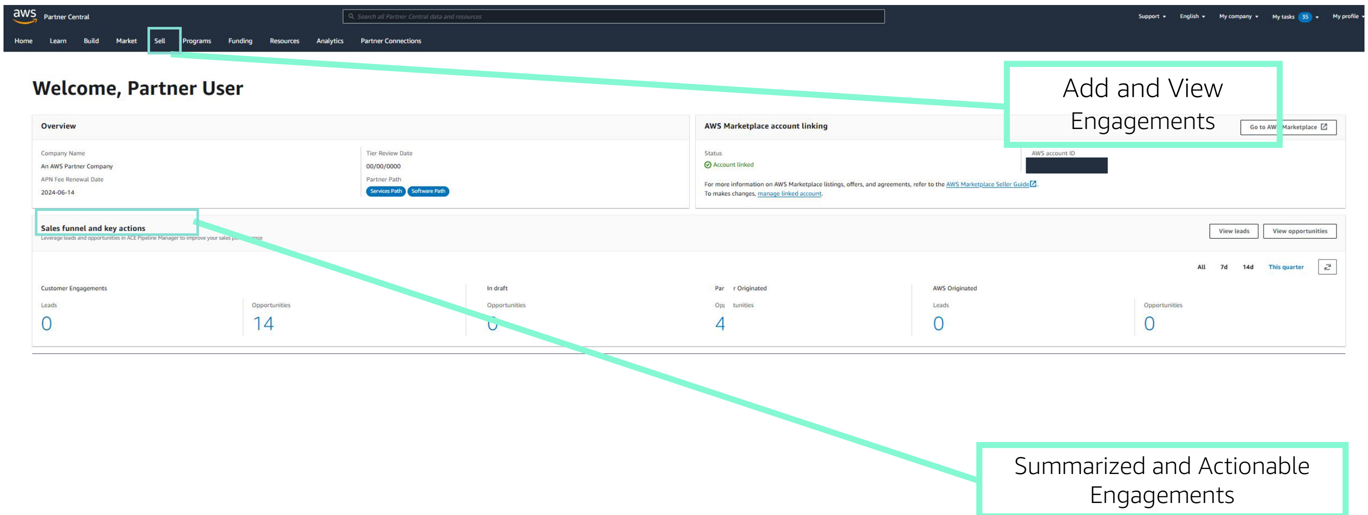
Introduction

The APN Customer Engagements Pipeline Manager is an exclusive benefit for participating AWS Partners in the APN Customer Engagements (ACE) Program. The ACE Pipeline Manager provides AWS Partners full service management of their pipeline of AWS customers, allowing for joint collaboration with AWS on those engagements. This guide walks through how to use the ACE Pipeline Manager and equips you with the necessary skills to drive successful customer engagements on AWS.

Getting Started

The ACE Pipeline Manager is located within APN Partner Central. The core features are located under 'Sell', which are discussed extensively in sections **Opportunities** and **Leads** in this guide. In this section, we will start by taking a tour of the different components of the overall ACE Pipeline Manager.



ACE Terms and Conditions

Prior to participation in the ACE Program, including access to the ACE Pipeline Manager, AWS Partners are required to accept the ACE Terms and Conditions. Only the Alliance Lead at your firm is able to accept the Terms and Conditions. The Alliance Lead is prompted to accept the Terms and Conditions the first time the ACE Pipeline Manager is attempted to be accessed.

Alliance Leads can accept the ACE T&Cs by following the steps below:

1. Login to APN Partner Central
2. Select 'Sell'
3. Carefully read through the Terms and Conditions that appear and select 'Accept'

If you're not the Alliance Lead of your firm and the ACE T&Cs haven't been accepted, you will receive the message below. Please reach out to your Alliance Lead with a reminder to accept the ACE T&Cs.

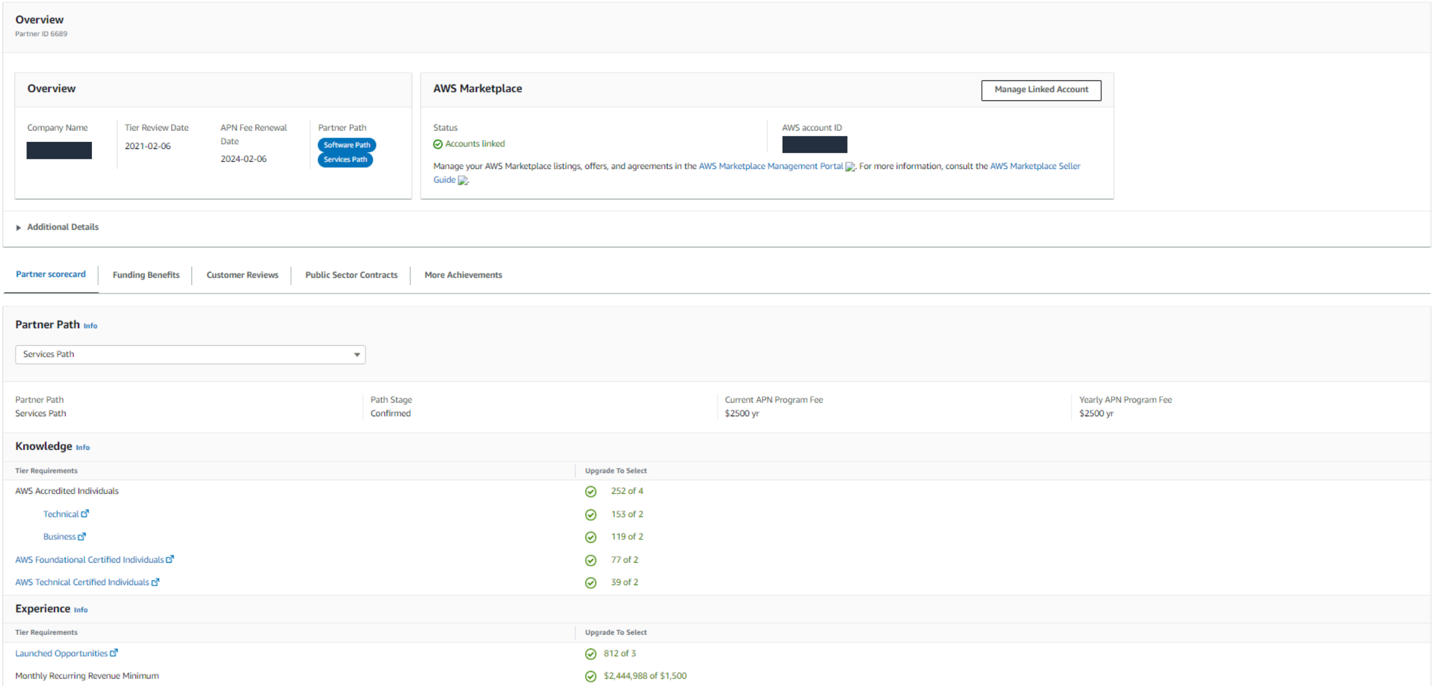
APN Customer Engagements Program Terms & Conditions

Thank you for attempting to use the APN Lead and Opportunity Management Tool. We've released new APN Customer Engagements Program Terms and Conditions and they must be accepted by the Alliance Lead in your firm before you're able to proceed. Please contact your alliance lead with a reminder to accept the terms and conditions Michael Kelly, mike@selectstar.io.

Alliance Leads can reference the ACE T&Cs after they have been accepted by following the steps below:

1. Log in to APN Partner Central
2. Select 'View Scorecard' in the AWS Partner Path section
3. Expand 'Additional Details' and click on 'ACE Program Terms Acceptance Date' link

Partner scorecard



Permissions

The ACE Pipeline Manager is permission-based. Upon acceptance of the ACE Terms and Conditions, only the Alliance lead will have access to the ACE Pipeline Manager and will need to enable permissions for other Partner Central users (Partner Users).

The Alliance Lead or an Alliance Team user can assign ACE User or ACE Manager permissions. Please note, it can take up to **one hour** for the permissions to fully activate after they are assigned.

• The **ACE User role** can be assigned to an unlimited number of users, and provides users access to view and manage opportunities submitted by themselves, and to leads and opportunities in which they are the owner.

• The **ACE Manager role** can be assigned to up to 20 users, and provides users access to view and manage opportunities submitted by any Partner user and access to all leads and opportunities shared by AWS

• **Available Users** are individuals in your firm with an active Partner Central Login (account). To enable new users to create a Partner Central Account, share this APN Partner Central Self Registration link.

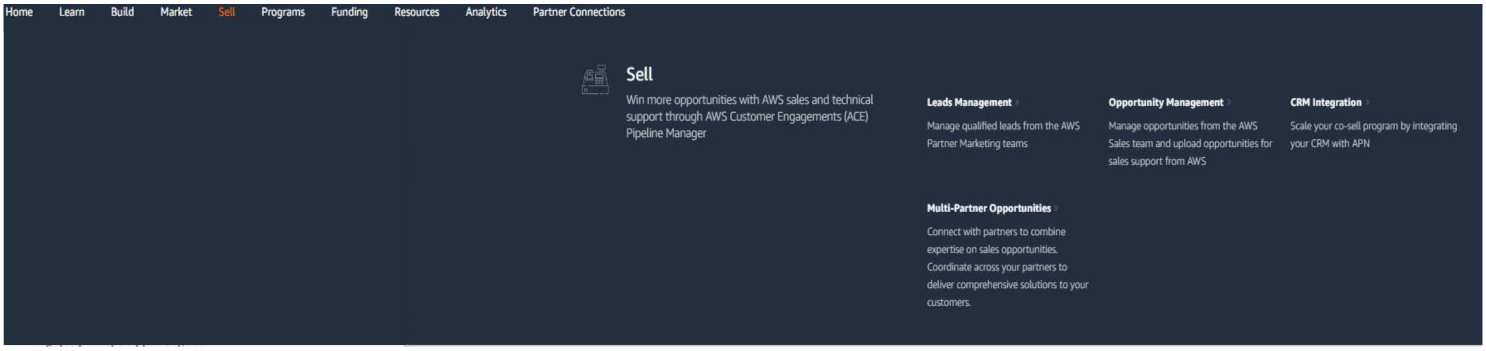
For more details refer to AWS Partner Central User Permissions Guide.

The Alliance Lead must follow the steps below to grant users permissions:

1. Navigate and login to APN Partner Central
2. Select ‘User Management’ from ‘My Company’ on top right
3. Scroll down to ‘Manage ACE Pipeline Manager Users’
4. Click ‘Manage ACE Pipeline Manager Users’ to open
5. Search and Select ‘Grant Access’ for the desired individual from the list of ‘Available Users’

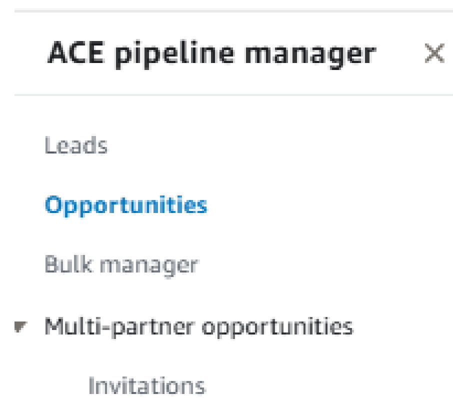
Sell Tab

Once the Terms and Conditions and Permissions are enabled, you're ready to use the ACE Pipeline Manager! To get started, in APN Partner Central, navigate to 'Sell'. This is where you can 'View Opportunities' and once you click on it you can add new and manage existing customer engagements in partnership with AWS.



Leads Tab

For ACE Eligible Partners, the Leads tab allows you to receive, accept, and manage AWS Lead Referral engagements shared from AWS. See section on Leads for more information.



Opportunities Tab

The Opportunities tab allows you to add new and manage existing opportunity engagements. For ACE-Eligible Partners, this is also where AWS Opportunity Referral engagements shared from AWS can be reviewed, accepted, and managed.

See section on Opportunities for more information.

Seller Analytics

The Seller Analytics tab allows you to view detailed statistics and relevant datapoints associated with your opportunity pipeline.

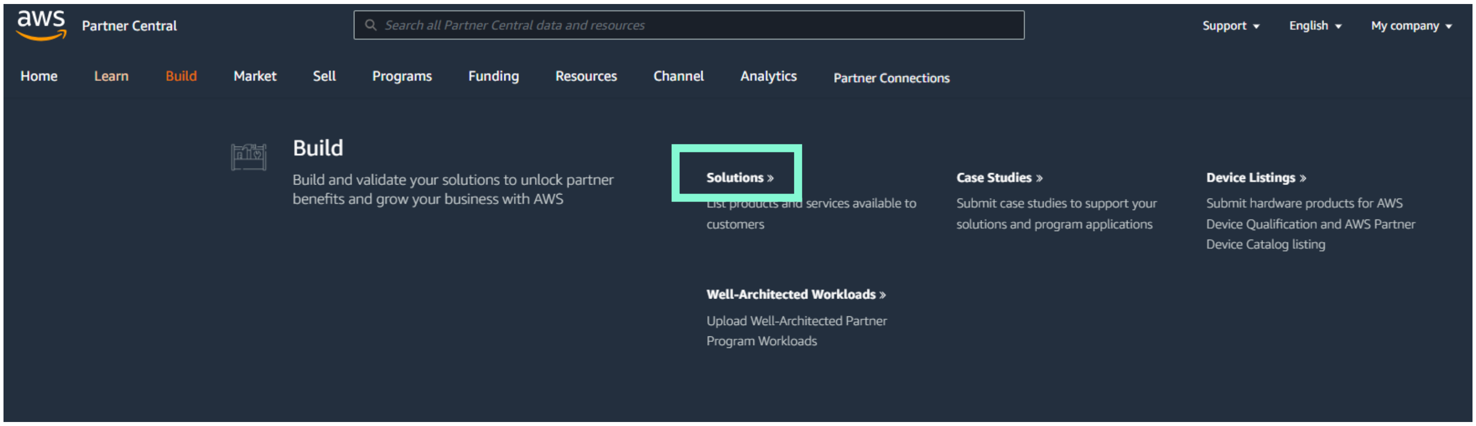
Multi-Partner Opportunities

Multi-Partner opportunities tab allows you to manage your collaboration opportunities. You can keep track of opportunity connection requests (inbound or outbound) and more.

See section on Partner Connections to learn more.

Build Tab – Partner Solutions

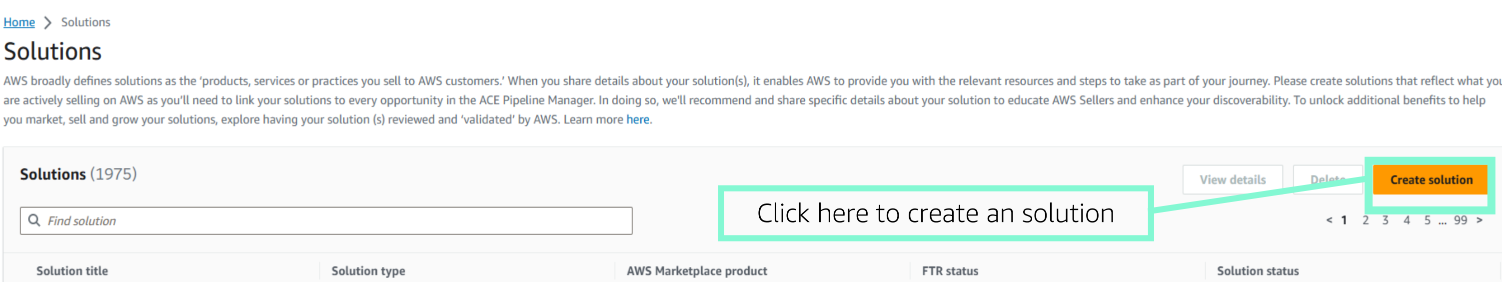
On the build tab you will be able to manage your Partner solutions.



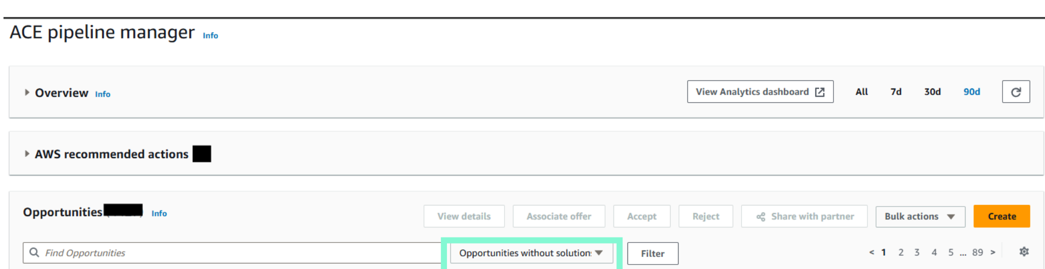
Partner Solutions

Solutions is what you intend to co-sell with AWS. After creating an solution, you will have to get the solution validated through Foundational Technical Review (FTR) to gain co-selling benefits and published to partner solutions finder (PSF). If you have an AWS Marketplace account linked, a second panel will show a list of AWS Marketplace products connected to the specific solution. When solutions are validated, they might be published to AWS's Partner Solution Finder. **Solutions Id is a requirement to move pipeline to 'Committed' or 'Launched' stage.**

For more details on the Solution creation process please refer to the solution creation steps.



Opportunity Updates and solutions



To find and update all open opportunities without a solution, follow steps

1. Go to the sell tab in Partner Central.
2. Select Opportunities sub tab.
3. Select the drop down arrow next to search box and select "Opportunities without solutions" view.
4. Either select the opportunities you wish to update individually with solutions or utilize "Bulk Update" function to add this information at scale.

Import Manager Tab

The Import Manager tab allows you to review all of your bulk imports. You can review the timestamp as well as which records were successful and unsuccessful with import.

See section on [Bulk Actions > Import Opportunities] for more information.

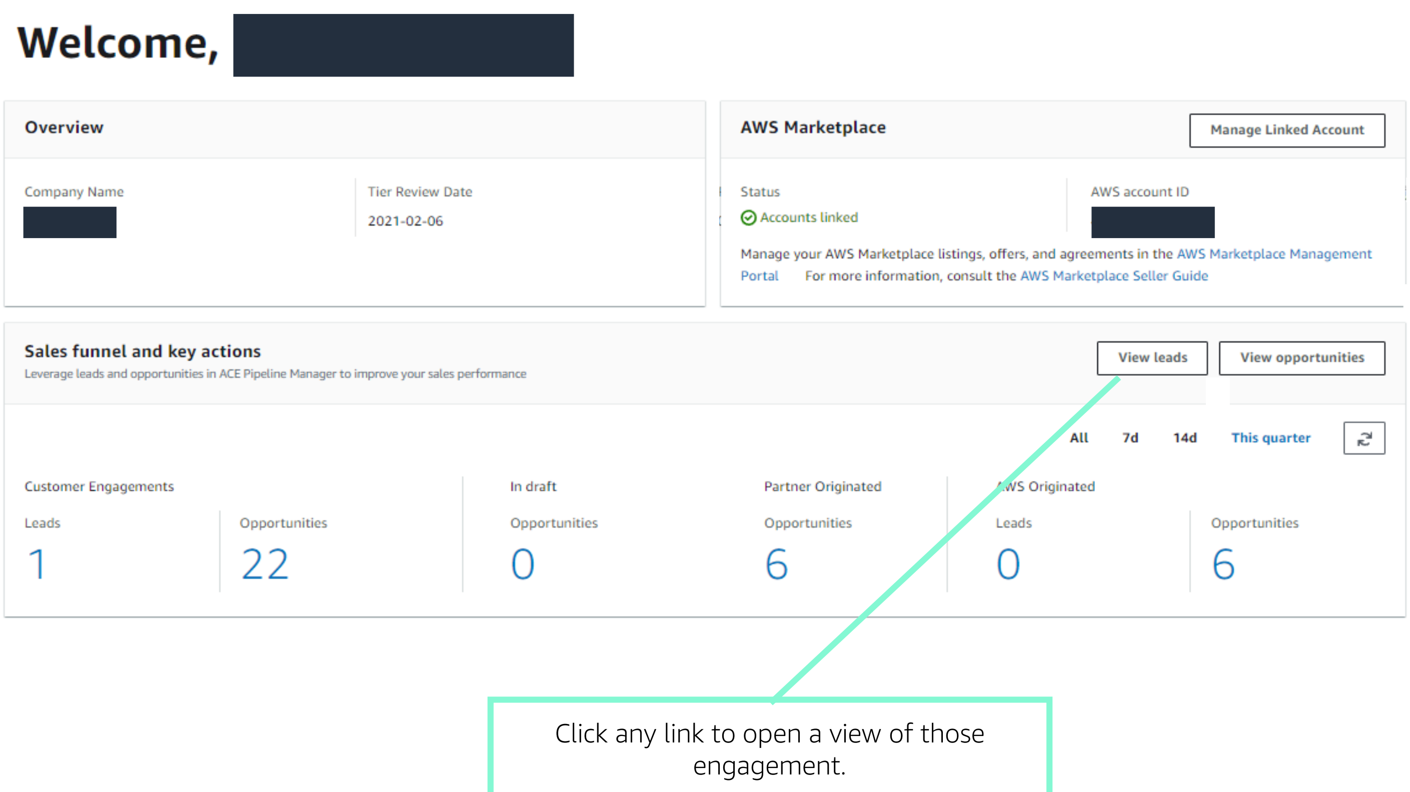
Sales Funnel and Key Actions

The Sales Funnel and Key Actions feature on the homepage provides a summary of your pipeline and highlights calls to actions that AWS recommends to help maximize your sales performance.

All Customer Engagements summarizes and surfaces all engagements that you've shared with AWS, and engagements that have been shared by AWS.

Shared by AWS in the last 7 days summarizes and surfaces engagements received from AWS in the previous 7 calendar days.

Date of last provided update exceeds 2 weeks summarizes and surfaces engagements which haven't been updated within the recommended bi-weekly cadence.



List Views and Column Picker

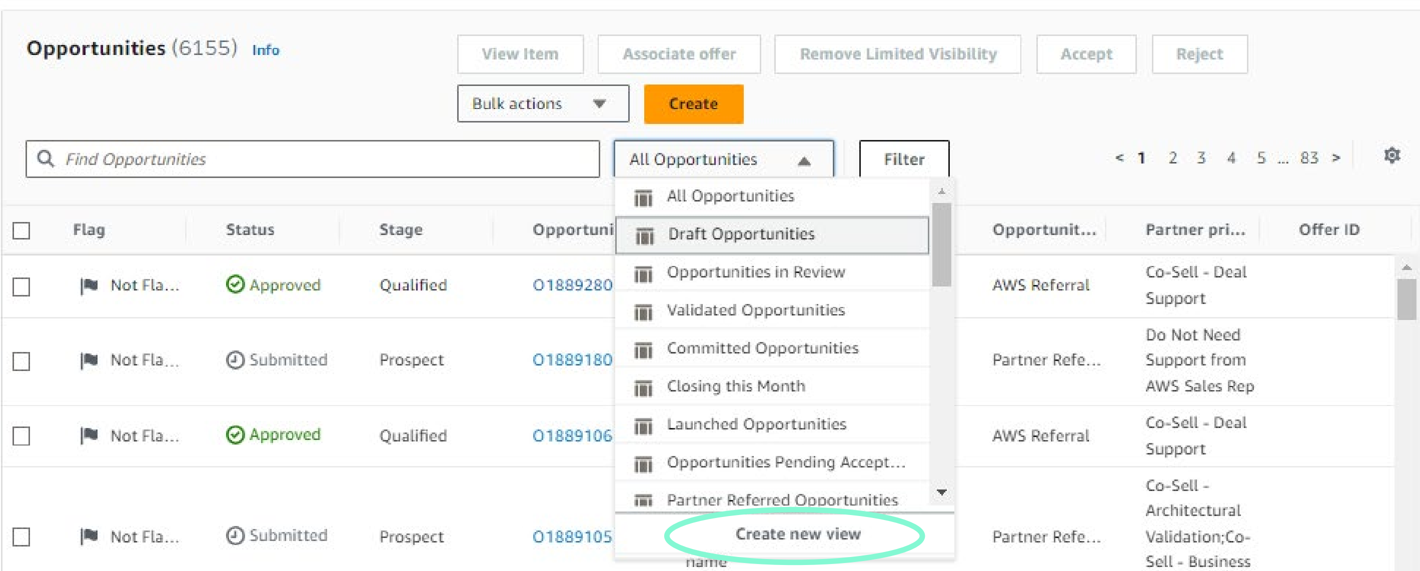
List Views

Upon login, the **Opportunities** tab will automatically display 'All Customer Engagements'. You can alternate views by clicking on the drop-down beneath the main tabs. For a full list of list view definitions, see section for **Opportunity List Views** in the glossary.

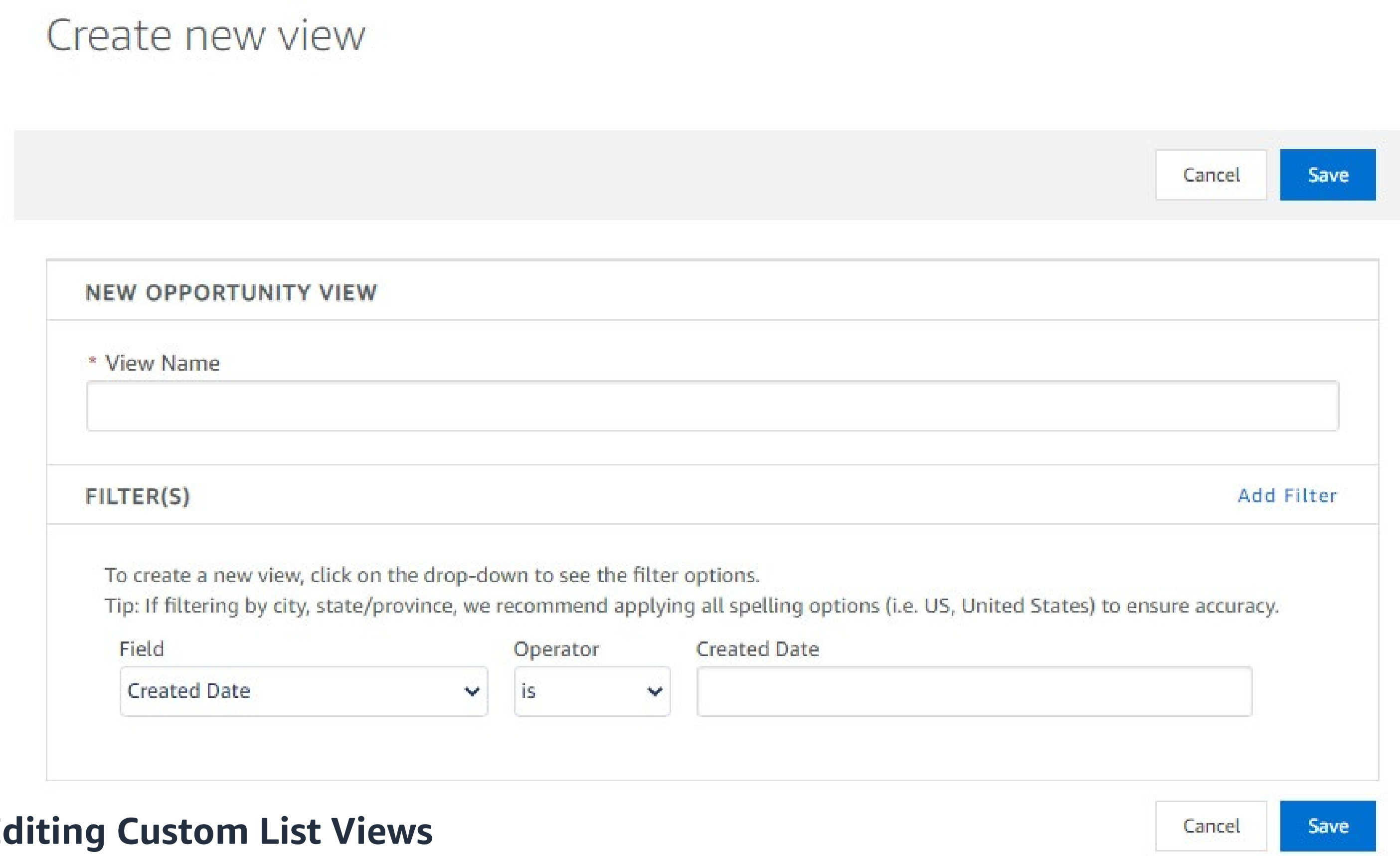
Creating Custom List Views

Partner Users have the ability to create custom list views for both Leads and Opportunities to keep their AWS pipeline organized.

1. Start on the tab you want to create a view for (e.g. Click on the ‘Opportunities’ tab if you want to create a custom list view for Opportunities and click on the ‘Leads’ tab if you want to create a custom list view for Leads).
2. Click on the arrow next to ‘All Customer Engagements’ to surface the drop-down menu
3. Click on ‘Create New View’.



4. Enter in the desired View Name and apply the appropriate filters and click ‘Save’. Note: AWS Partners can add more than one filter on a ‘custom view’.



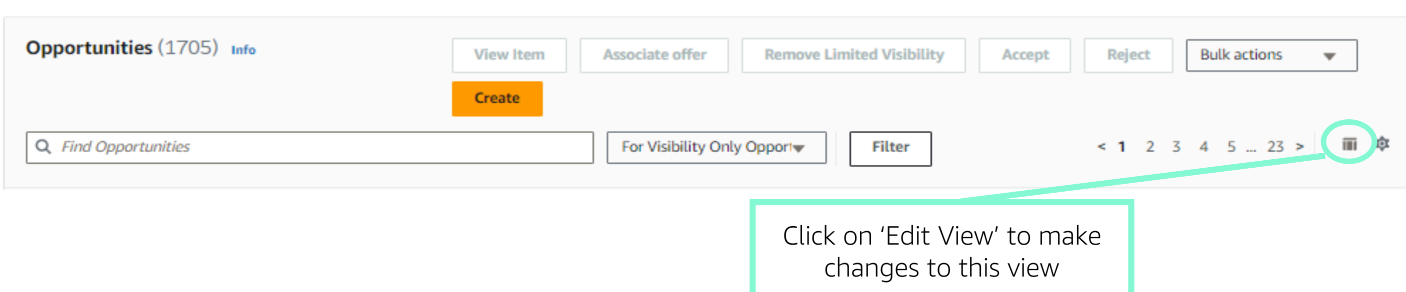
Editing Custom List Views

Partner users can make edits to any custom list view including changing the name as well as adding or removing columns. Start on the tab where you want to edit a view (ex. Click on the ‘opportunities’ tab if you want to edit a custom list view for opportunities and click on the ‘leads’ tab if you want to edit a custom list view for leads).

1. If you are already in your custom view, click on the down arrow to reveal options to Edit, Transfer, or Delete. If you are not in your custom view, click on the downward arrow and scroll to the desired view. Click on the vertical dots to the right of the desired view to display further options.

2. Click on either ‘Edit View’ option.

3. Make the desired updates to the view name and/or filters and click ‘Save’.



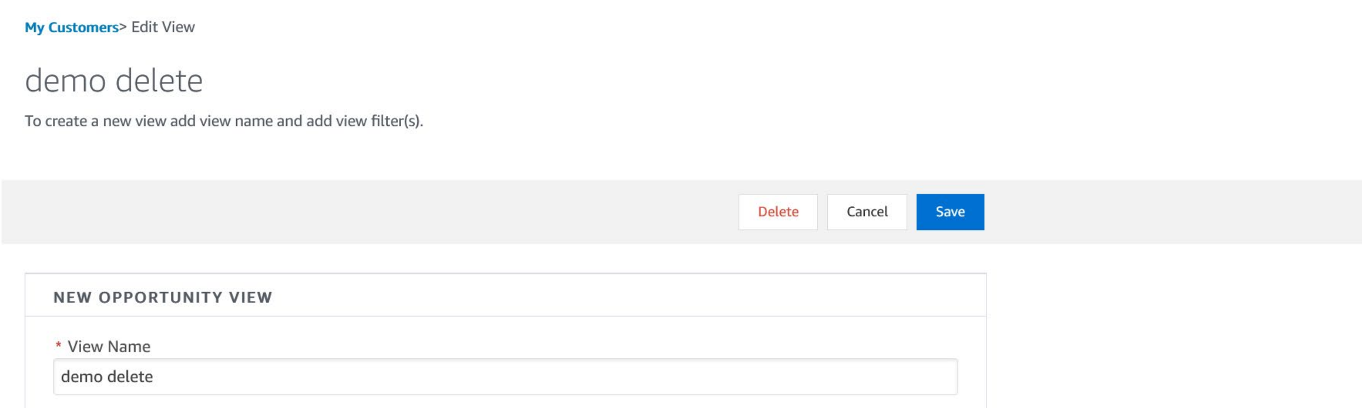
Deleting List Views

Partner Users can delete any custom list view. Start on the tab with the view you want to delete (e.g. Click on the ‘Opportunities’ tab if you want to delete a custom list view for Opportunities and click on the ‘Leads’ tab if you want to delete a custom list view for Leads).

1. If you are already in your custom view, click on the down arrow to reveal options to edit, transfer, or delete. If you are not in your custom view, click on the downward arrow and scroll to the desired view. Click on the vertical dots to the right of the desired view to display further options.

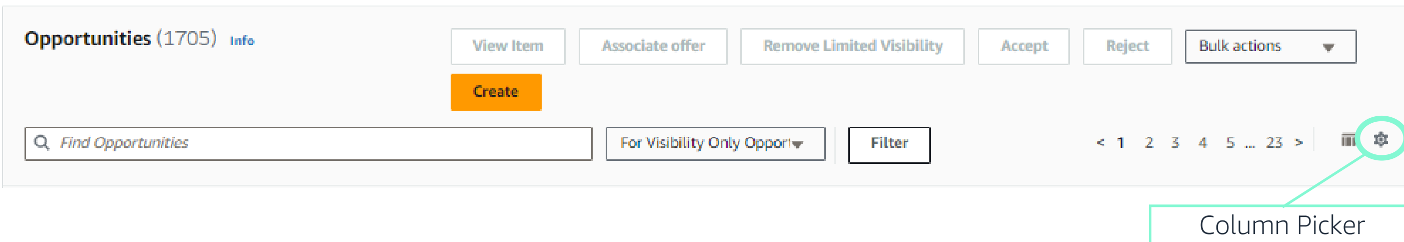
2. Click on either option to delete the view.

Note: Deleting the view will not delete the leads or opportunities. They will still appear in ‘All Customer Engagements’.



Column Picker

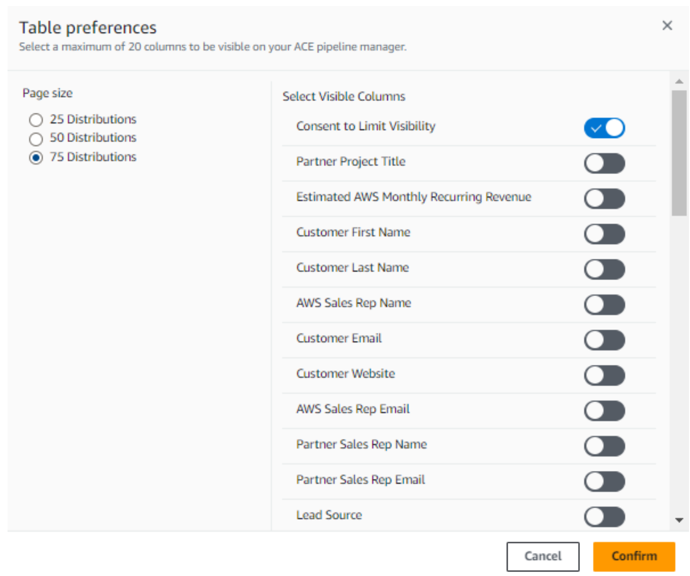
The Column Picker feature allows you to modify the columns that are displayed across all list views. See section for **Lead Definitions** for a complete list of definitions for each column option.



Once display columns are modified, they will remain intact across all list views aligned with their respective tabs (i.e. Opportunities tab, Leads tab) and upon every subsequent login to Partner Central.

To modify columns:

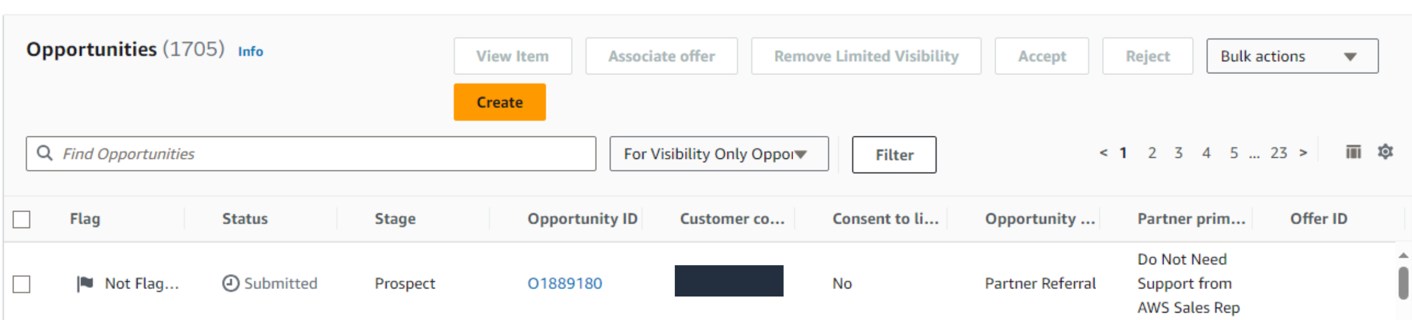
1. Hover over the icon that displays 'Select Columns'
2. Select or deselect available columns
3. Select 'Apply Changes'



Search

Leverage the search functionality to easily locate a specific record.

Note**:** To search through the entire list of opportunities, ensure you are in the view that shows 'All Customer Engagements.' Beginning a search in a specific list view will only pull results generated from that list view.



Opportunities

Opportunities can be added individually or by bulk import (see section for **Bulk Actions >** Import Opportunities). It is encouraged that Partners submit opportunities early in the sales cycle after the discovery phase is complete, once the opportunity is at a stage of 'Qualified,' or above.

Note**:** Only the Alliance Lead, Alliance Team and ACE Manager is able to see a complete view of opportunities. Individuals granted access to the ACE Pipeline Manager would see their own submitted opportunities.

Types of opportunities available

Co-Sell: for opportunities when the submitter requires support from an AWS Sales representative on the opportunity. Support types include: 1/ Architectural Validation, 2/ Business Presentation, 3/ Competitive Information, 4/ Pricing Assistance, 5/ Technical Consultation, 6/ Total Cost of Ownership Evaluation, 7/ Deal Support, 8/ Support for Public Tender or RFx.

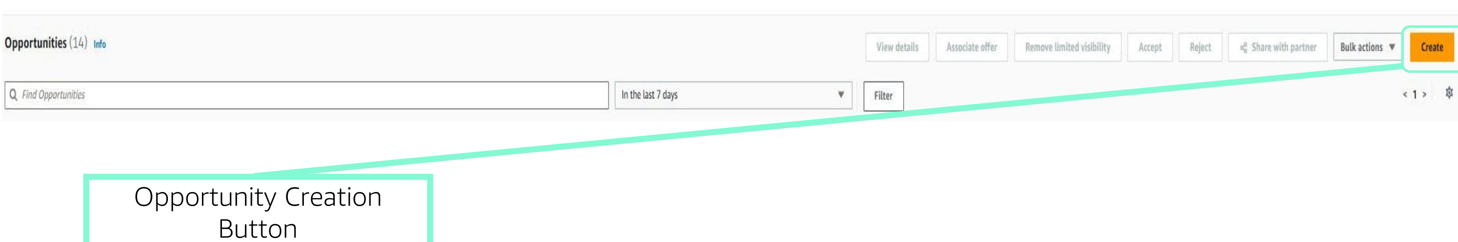
For Visibility Only: for opportunities where there is no support required from an AWS Sales representative there is an option to submit this opportunity type. In case this option is selected, there will be no support provided by AWS Sales and the opportunity will be solely managed by the submitter. It is possible to request Co-selling support on these opportunities at any stage during their lifecycle

National Security: For opportunities associated with National Security and Intelligence Community end-customers across the world. For United States end customer, the complete list of National Security end customers can be found on this page.

More information on how to submit each opportunity type will be provided in the next pages.

Create new opportunity

1. To submit an individual opportunity, click on the 'Create' button on the right.



2. Fill out the core fields (see next page).

Step 1: Customer Details

Customer details

Customer DUNS - *Optional* Info

Customer data universal number system, 9 characters

Enter

For example: 123456789

Customer Company Name

Enter

Industry Vertical

Government

Classified National Security Information Info

Indicate whether this opportunity contains classified National Security Information.

- ( ) Yes: This opportunity contains classified national security information.
- (•) No: This opportunity does not contain classified national security information.

Customer Website

Enter

For example: www.index.com

Country

Enter Country

Postal Code

Enter postal code

City - *Optional*

Enter

Address - *Optional*

Enter

Tip: if you have the customer's DUNS ID you can provide it here

Note: When Industry Vertical is 'Government', you will need to identify if the opportunity contains classified National Security information (see next section for more details)

Note: We need the customer website and zip code in order to align this opportunity correctly with our internal stakeholders.

Step 2: Project Details

Project details

Partner primary need from AWS

- (selected) Co-Sell with AWS
  Share the opportunity with AWS to receive deal assistance and support.
- Do Not Need Support from AWS Sales Rep
  Share this opportunity with AWS for visibility only, you will not receive deal assistance and support.

Tip: If '**Co-Sell with AWS**' is selected, the APN Partner will be prompted to specify the need from AWS for co-sell.

Partner specific needs from AWS for Co-sell Info

- [ ] Co-Sell - Architectural Validation
- [ ] Co-Sell - Business Presentation
- [ ] Co-Sell - Competitive Information
- [ ] Co-Sell - Pricing Assistance
- [ ] Co-Sell - Technical Consultation
- [ ] Co-Sell - Total Cost of Ownership Evaluation
- [ ] Co-Sell - Deal Support
- [ ] Co-Sell - Support for Public Tender / RFx

Tip: request support for multiple items if you need it

Tip: for request on Public Tenders or RFX select this option (e.g., request for proposal, information, etc.)

Opportunity Type

- Net New Business
  This opportunity is based on a new contract or agreement with this new customer/ logo for your company.
- (selected) Expansion
  This opportunity is based on an existing contract with this end customer which may include new line of business, partner product, or additional customer instances.
- Flat Renewal
  This opportunity is based on an existing contract with this end customer where no expansion will take place.

Tip: For existing contracts between the end customer and the Partner select 'Expansion' where there is a potential for incremental revenue and 'Flat Renewal' when no expansion in revenue will take place

Parent Opportunity ID - *Optional* Info

The original opportunity that this opportunity is renewing from.

Search

Note: When 'Expansion' or 'Flat Renewal' is selected you will have the option to provide the Parent Opportunity ID for this renewal.

Partner Project Title

Enter

Sales Activities Info

What sales activities have happened with the end-customer?

Choose

Customer Business Problem Info

Provide a clear description of the customer's business problem/pain point you are trying to address.

Minimum 20 characters.

Solution Offered Info

Choose the partner solution you offered to the end-customer. If other, describe your solution.

Search

AWS Products - *Optional*

Choose one or more AWS products that will be utilized to solve the customer's business problem. Adding products enables AWS to connect you with the right support on this opportunity

Choose

Next Step - *Optional*

Enter the next steps for this opportunity.

Enter

Next steps can have up to 255 characters.

Use Case

Choose

Delivery Model

Indicate one or more of the most applicable deployment or consumption model for your solution or service.

Choose

Estimated AWS Monthly Recurring Revenue Info

Enter

Need help estimating monthly recurring AWS services consumption? Click here for the AWS Pricing Calculator to help you create a cost estimate for your opportunity. Once complete, please include link to the AWS Pricing Calculator estimate in 'Additional Comments'.

Target Close Date Today

APN Programs - *Optional*

Choose

Tip: Should include a clear description regarding pain points, customer need,

Tip: Tag any of your active solutions and AWS Products to opportunities (for more details on solutions see Partner solutions section). You can tag up to 10 Partner solutions. It is a **requirement** to move to 'Committed' or 'Launched' stage.

AWS Training Partners (ATP): Select 'Training' Use Case when submitting training opportunities, and use AWS revenue resulting from AWS Training kits to fill in Estimated AWS Monthly Recurring Revenue.'

Tip: Should reflect the most applicable deployment or consumption model. Select the pick-list option(s) and use the arrows to add or remove.

Estimated AWS MRR helps you inform AWS Sellers about the expected monthly usage of AWS. Your estimate of AWS MRR should approximate the monthly service fees to AWS at standard catalog pricing at 3 months post-launch.. Also, find below additional guidance on certain opportunity types.

-For AWS-based multi-tenant SaaS, you may enter $1.
-For AWS Training Partners (ATP), AWS revenue resulting from AWS Training kits should be entered as MRR.
-For AWS ProServe, enter the AWS ProServe contract value.
-In order to reflect the reselling of an ISV solution through Channel Partner Private Offers (CPPO), input $1 if you are the Channel Partner or the listing fee if you are the ISV.
-For Well Architected Framework Review (WAFR) enter $1 at time of submission.
-For Well Architected Framework Review (WAFR) on remediation opportunities enter the estimate of the new service.
-For Cost Optimization enter $1 at time of submission.
-For Marketplace Private Offers (MPPO), enter the listing fee.

Tip: Should always be a future date. Previously 'Launched' or 'Closed Won' opportunities should not be submitted

Opportunity marketing details

Opportunity source

Indicate whether this opportunity was sourced from a marketing activity.

- ○ Yes: Sourced from marketing activity.
- ◉ No: Not sourced from marketing activity.

Note: If 'Yes: Sourced from marketing activity' is selected, 4 additional questions will pop up for the partner to fill to clarify: the marketing campaign, the marketing activity use-case, the marketing activity channel and whether marketing development funds were used.

3. Review your entered information, make any necessary edits, and to submit click 'Save & Submit' on the bottom right.

4. A message will appear confirming your submission was successful.

If the **submission was not successful**, you will receive an error message if it is due to one of the following reasons. You are able to edit the opportunity and resubmit:

- Estimated AWS Monthly Recurring Revenue cannot be blank or 0
- Target Close Date should be a future date
- Submitted a duplicate opportunity within 120 days
- Customer Business Problem must have minimum of 20 characters
- Solution offered represents a partner solution, which can be a software product or a consulting practice, created and delivered by AWS Partners. To look up solutions click on the "Solution Offered" field or start by typing the solution ID or first two characters of the solution title. OR

Type "Other" in the "Solution Offered" search box and provide a description in the "Other Solution Offered" field. You can add up to **10 solutions** to an opportunity. You cannot select a defined solution and "other" at the same time.

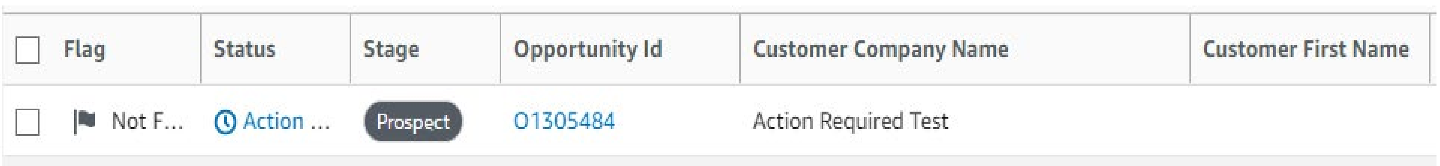
- If Solution Offered is 'Other', Other Solution Offered field cannot be blank
- Customer website should be a valid domain
- Submitting Partner cannot be end customer
- Closed Lost Reason is required when closing the opportunity
- State is required when Country is United States
- Postal Code is required for every Country that uses this system
- Select from the predefined Partner Primary Need from AWS options
- If Partner Primary Need from AWS is 'Co-Sell with AWS', Partner specific needs from AWS for Co-Sell cannot be blank

AWS Opportunity Review Process

The SLA for initial review after submission is **5 business days**. If a submission is under secondary review (Incomplete, Forecast Conflict) or is a bulk import, the SLA for review can be extended.

An opportunity can be placed into a secondary review process if it does not fully meet validation criteria. The Partner (ACE User) opportunity owner and Alliance lead (along with Alliance Team and ACE Manager) will be notified via email and in ACE Pipeline Manager when additional information is needed from the Partner in the secondary review process.

Partner users are able see opportunities that require action and review the ‘APN Review Reason’ codes in ACE Pipeline Manager.



Opportunity Details - Project Description, MRR, Target Close Date

APN Review Reason codes:

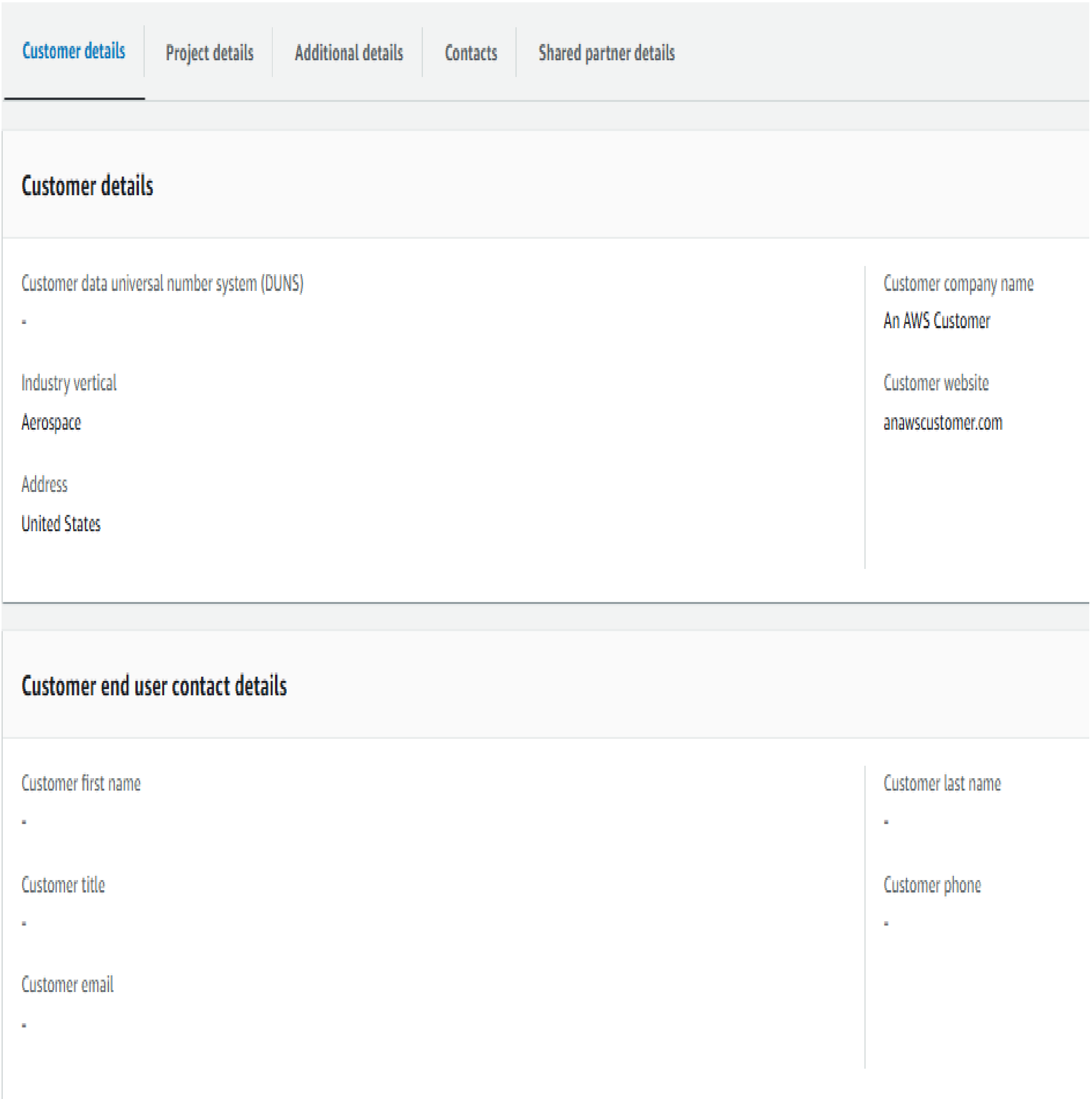
- Clarify Solution: needs clarification around the customer pain point/business need and/or proposed solution.
- Clarify Revenue: needs clarification around net-new AWS consumption/spend.
- Other: AWS will provide specific information needed to validate in the notification.

When an opportunity requires action while in the secondary review process, Partner users are able to update opportunities directly within ACE Pipeline Manager. Note: Partners can also sort by rejection reason.

1. Sort by the ‘Status’ column to view all opportunities with status ‘Action Required’.
2. Access the opportunity details
3. Click on ‘Edit’ in the top right to access all opportunity details, or on each specific section to access specific details
4. Make the required changes and click on ‘Save’ in the bottom right corner

5. Click ‘Submit’ at the top of the page to push the updates to AWS. Note that clicking ‘Save’ will save the changes in your Pipeline Manager without sending them to AWS

Note: Partners have 5 business days to provide updates on opportunities placed in the secondary review process. You will receive an email reminder at 3 days if updates have not been received.


Customer details
Project details
Additional details
Contacts
Shared partner details
Customer details
Customer data universal number system (DUNS)
-
Industry vertical
Aerospace
Address
United States
Customer company name
An AWS Customer
Customer website
anawscustomer.com
Customer end user contact details
Customer first name
-
Customer title
-
Customer email
-
Customer last name
-
Customer phone
-

Customer details | Project details | Additional details | Contacts | Shared partner details

Details

Partner primary need from AWS
Do Not Need Support from AWS Sales Rep

Partner project title
Opportunity Test One

Customer business problem **Info**
customer initiated Free trial on 3/15/23 and are looking for a solution to scan data they are ingesting into Amazon S3 for malware and are testing our solution to validate that we will meet their requirements and need serverless. This opportunity include

AWS products
-

Delivery model **Info**
-

Target close date
2025-01-31

Consent to limit visibility **Info**
No

Opportunity type
Net New Business

Sales activities
-

Solutions offered
-

Use case
-

Estimated AWS monthly recurring revenue **Info**
5000

APN programs
-

Opportunity marketing details

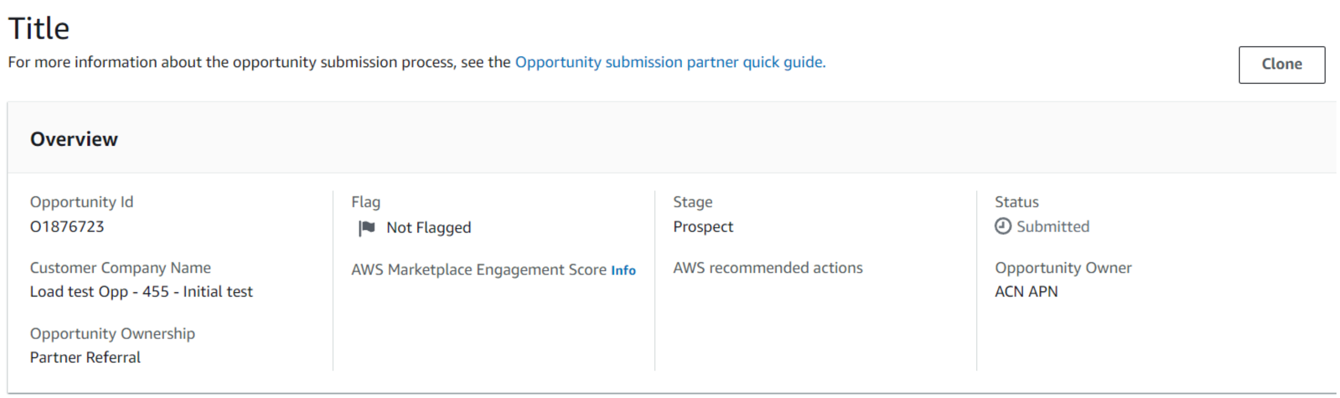
Opportunity source **Info**
No: Not sourced from marketing activity.

Cloning Opportunities

Partner Users can clone opportunities to reduce manual entry points required for opportunity submission.

1. Open the opportunity you want to clone by clicking the customer name.
2. Click on the 'Clone' button in the upper-right corner of the page.
3. Make any changes to editable fields and save or submit the opportunity.

Note: Opportunities with a status of 'Draft' cannot be cloned.



Accept Opportunities

ACE eligible AWS Partners are able to receive AWS Opportunity Referrals from AWS. These opportunities are generated by AWS where consent was captured to allow for an AWS Partner to assist with their proposed solution or workload. The Alliance Lead has visibility to all Opportunities that are shared. For detailed information please view our FAQs here.

Note: AWS Partners have limited information prior to accepting an opportunity. Accepting the opportunity will unlock further information pertaining to the customer. It is expected that opportunities are accepted within 5 business days or they will be removed from your view.

The following fields are visible prior to accepting an opportunity:

Customer company fields shared:

- End User (Company Name), End User Website, Country, Postal Code, Industry Vertical

Opportunity fields shared:

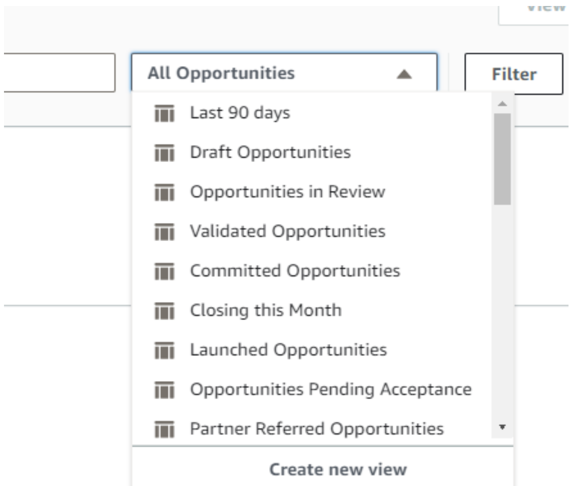
- Opportunity Type, Use Case, Created Date, Partner Project Title, Customer Business Problem, Next Step, Delivery Model, Monthly Recurring Revenue, Target Close Date, Lead Source, Opportunity Ownership

AWS contact fields shared:

- Name and email of AWS Sales Rep, AWS Account Owner, Partner Success Manager/ISV Success Manager, and Partner Development Manager/ Partner Development Representative, WWPS PDM

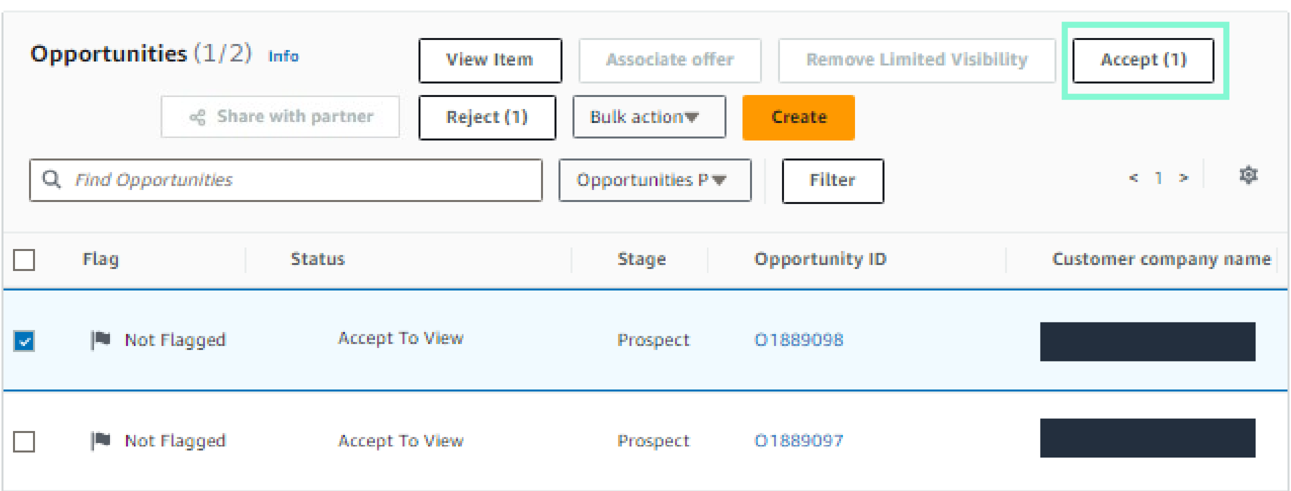
To accept an opportunity, follow the steps below:

1. From the Opportunities Tab, click ‘All Opportunities’ and navigate to 'Opportunities Pending Acceptance’

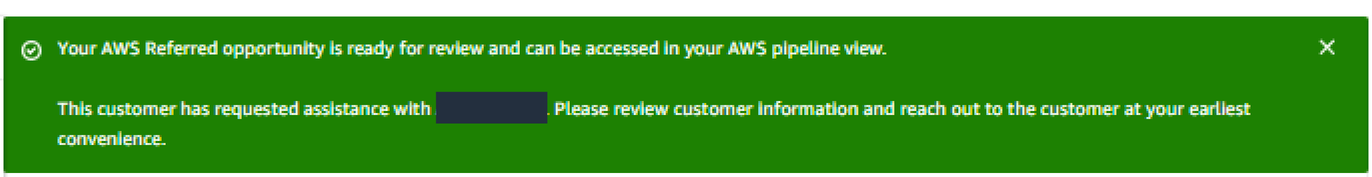


2. Click on the Opportunity ID to view all opportunity details visible prior to acceptance.

3. To accept the opportunity from the ACE Pipeline Manager select the opportunity you want to accept and then click on 'Accept’. You will be able to accept multiple opportunities

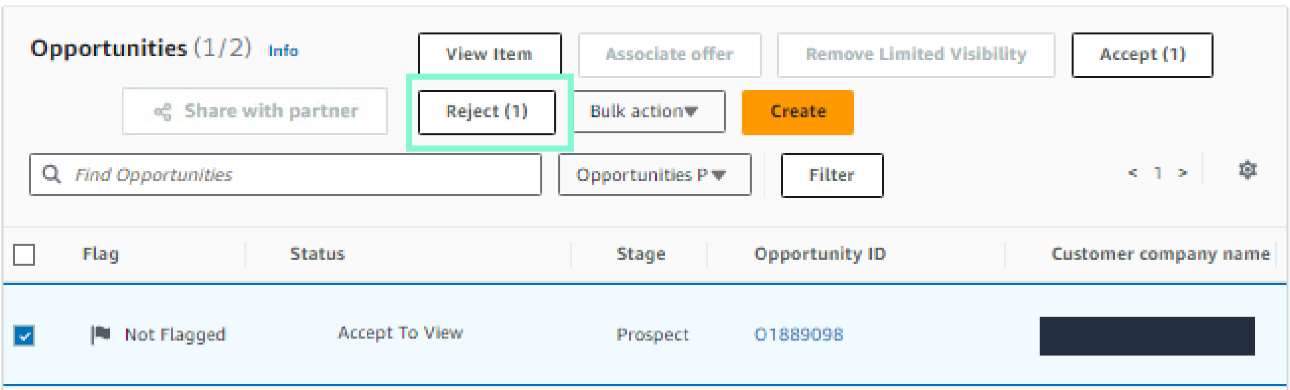


4. Once an opportunity has been ‘Accepted’, a confirmation will display.

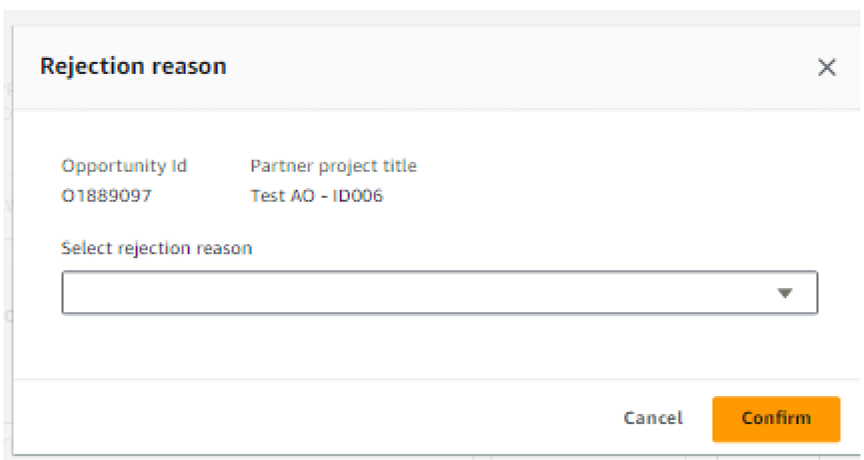


Reject Opportunities

1. From the ACE Pipeline Manager select the opportunity you want to 'Reject'. You may also click on the Opportunity ID to view the full information associated to this opportunity.



2. Click on 'Reject' in the ACE Pipeline Manager or inside the Opportunity details
3. You will need to select a rejection reason. In case you are rejecting multiple opportunities you will need to indicate a rejection reason for each opportunity.
4. Click on 'Confirm'.



5. The rejected opportunity will disappear from your pipeline.

Opportunity Updates

AWS Partners are expected to update validated opportunities with new sales activities on a bi-weekly basis through the end of the opportunity lifecycle: Launched or Closed/Lost. Updates can span from expected Revenue to Target Launch Date, but at minimum, next steps should be updated. **All partners require to add a solution ID to an opportunity in order to progress it to 'Committed' or 'Launched' stage.**

For Service Path, setting an opportunity to 'Launched' require an AWS Account ID.

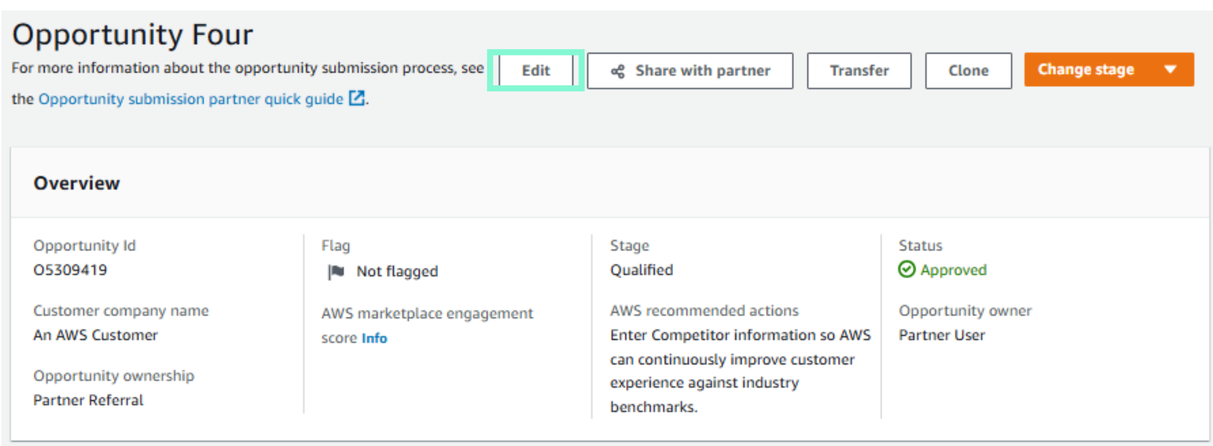
Note: APN Partner Central supports 3 languages (English, Japanese, Chinese). If you enter a 'Target Launch Date' in the future, but are receiving an error that says "Target Launch Date: Invalid date", please update the Partner user's language to one of the supported languages, and update the language setting in Partner Central. To do so:

In Partner Central go to 'My Profile' > Edit > Select one of the supported languages > Save

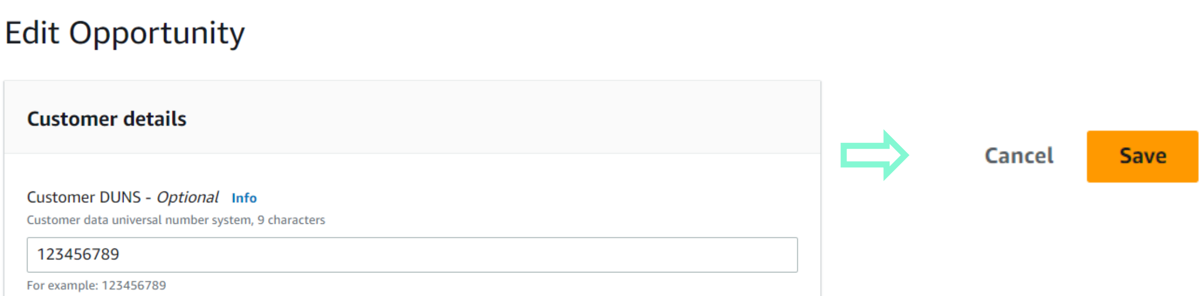
Validated opportunities are identified as Status 'Approved'. They can be updated individually or in bulk. For updating in bulk, please see section **Bulk Actions >** Update Opportunities.

To update an active opportunity individually:

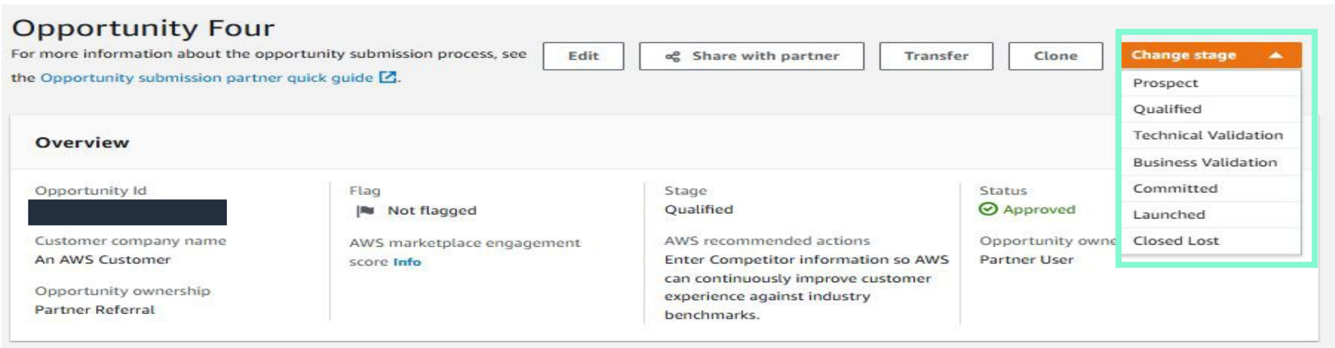
1. Navigate to view 'Validated Opportunities'.
2. Select the validated opportunity you want to update and click on 'Edit' on the top right corner.



3. Make any necessary updates and click 'Save' on the bottom right corner.

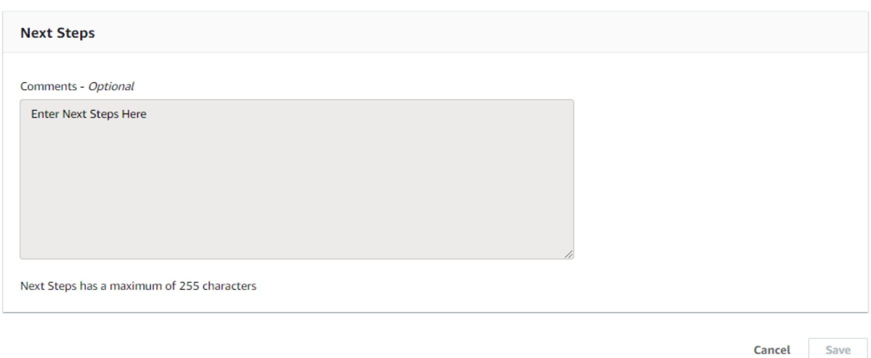


4. You can select ‘Change Stage’ to update the opportunity stage from the drop down menu.



5. To add Next Steps, go to the ’Next Steps’ tab and select ’Add’.

6. Enter the information desired and click ’Save’.



7. The updated information will display with a timestamp and ’Created by’ the name of the user who made the edits.

AWS Stage Visibility

When an opportunity has reached its terminal stage (Launched or Closed/Lost), the following actions need to be taken by the Partner:

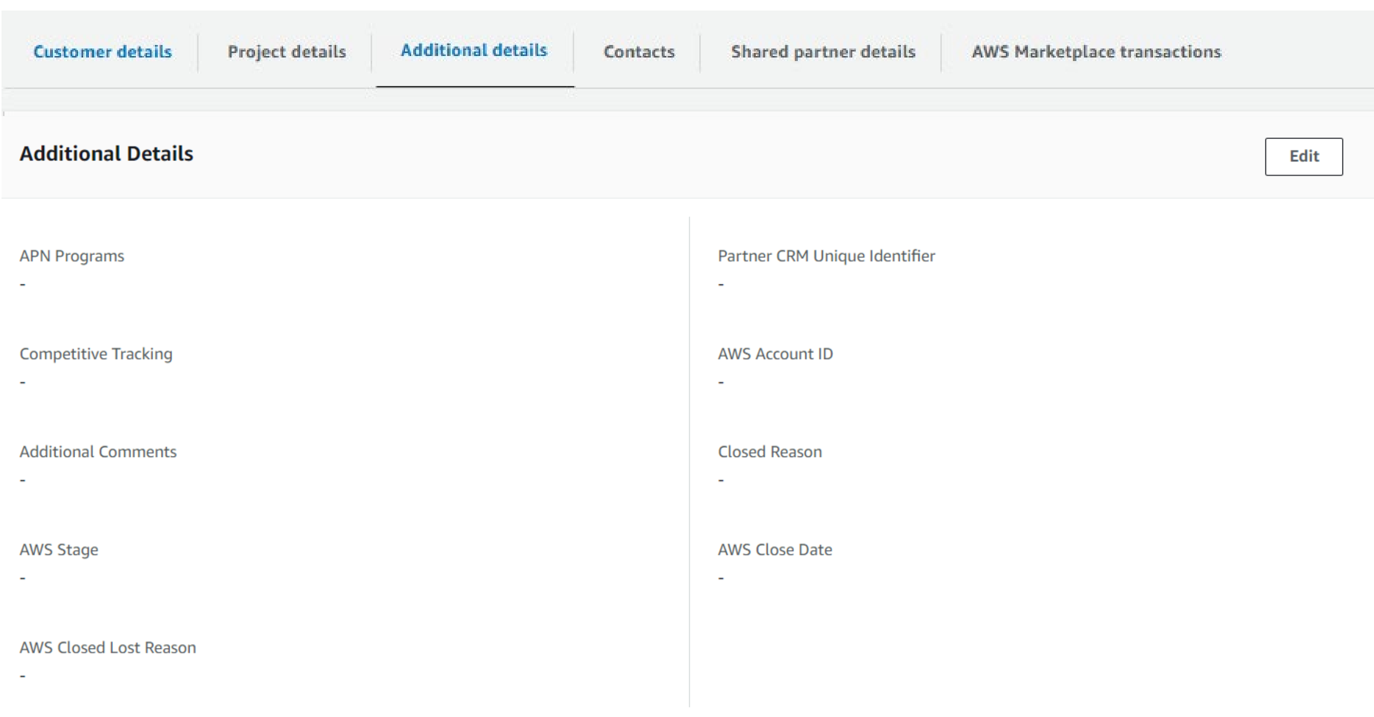
1. Update the Close Date
2. Add AWS Account ID (if applicable)
3. Update the Stage

If the AWS Seller updates the opportunity to a terminal stage in their CRM, the Partner will see (3) new fields added to the opportunity in ACE Pipeline Manager:

1. AWS Stage
2. AWS Close Date
3. AWS Closed/Lost Reason

The Partner-provided ‘Stage’ and ‘Target Close Date’ will not be updated or overwritten so that the Partner has visibility on updates from AWS and is still able to update and manage the opportunity. (Note: this applies to both Partner Referrals and AWS Referrals).

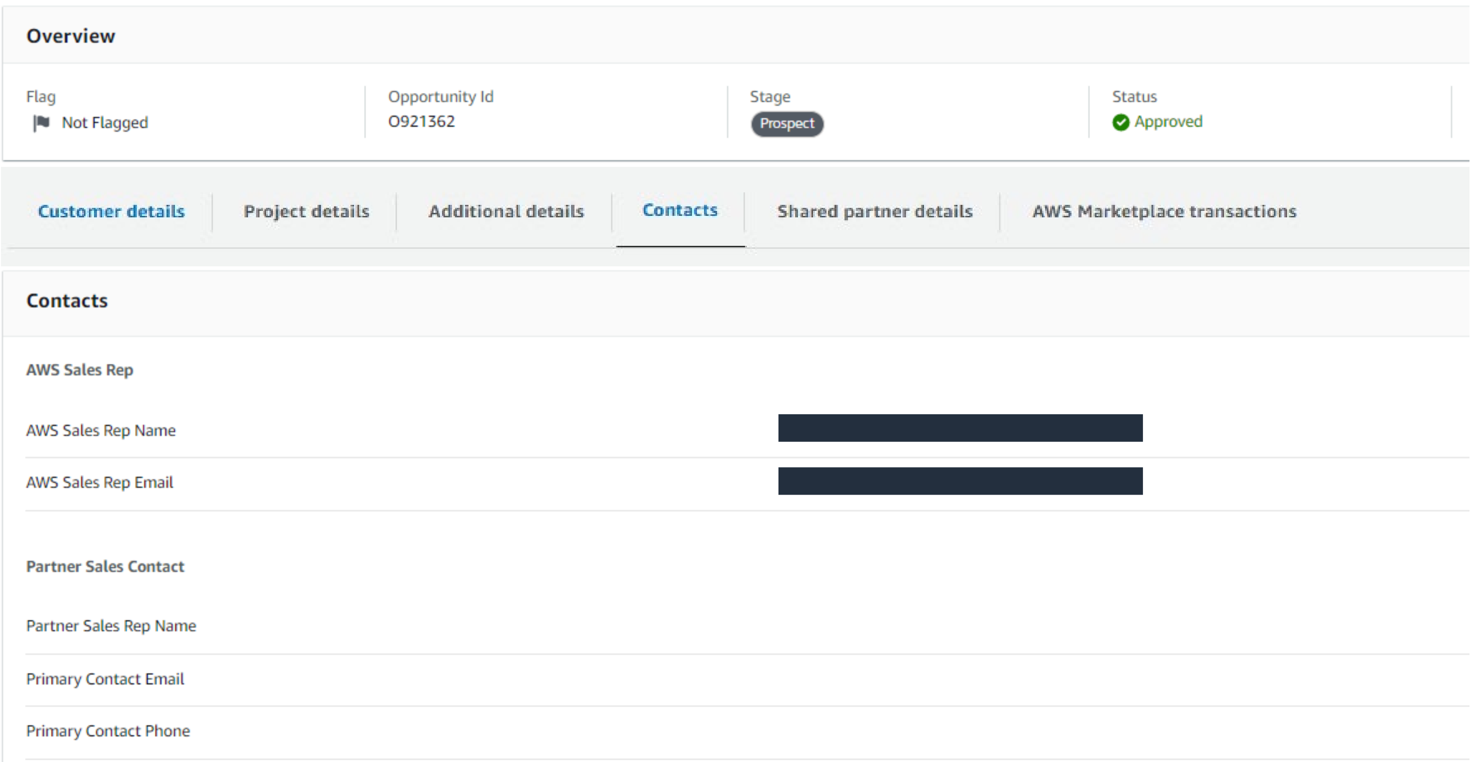
These (3) new fields are visible in the ‘Update’ section of a shared opportunity, under ‘Additional Details’ (see next page).



Opportunity Contacts

The ACE Pipeline Manager provides users with the ability to stay organized by surfacing the AWS contacts aligned to each validated opportunity. Follow the steps below to understand where to access this information.

1. Navigate to a validated opportunity. A validated opportunity will show a status of ‘Approved’.
2. Click into the opportunity by clicking on ‘Update’ or the ‘Customer Company Name’.
3. Click on ‘Contacts’.



Contact Roles

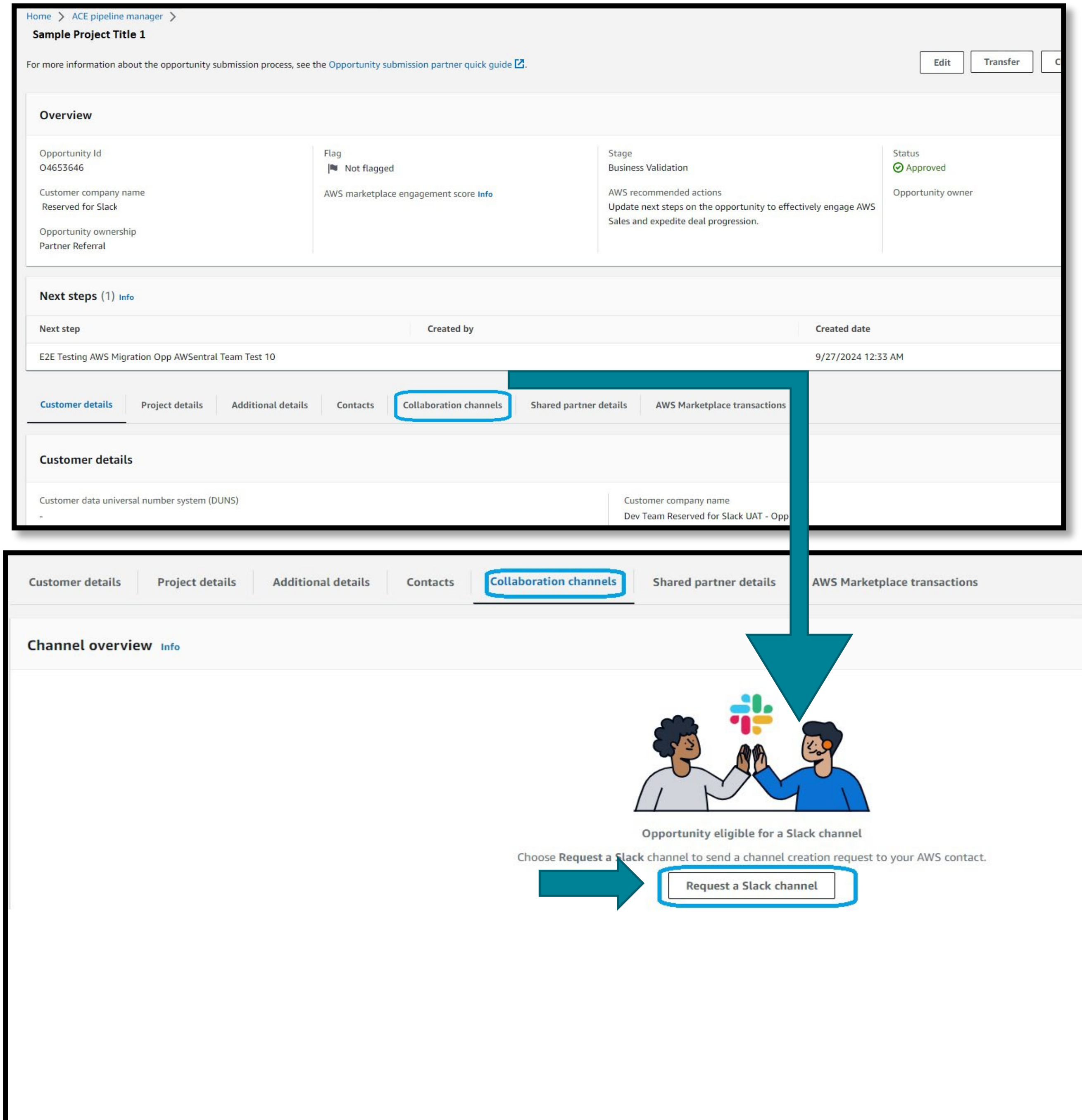
Leverage the chart on the following page to understand what contacts are surfaced from the 'Contacts' section of the opportunity, and their respective roles.

Contact Name	Role
AWS Sales Rep	The primary contact from the AWS Sales organization on this opportunity.
Partner Sales Contact	The primary contact from your organization for this opportunity. AWS sales team may reach out to this contact regarding the opportunity.
AWS Account Manager	The AWS account manager for the customer on this opportunity.
Partner Development Manager	Your go-to AWS person. PDMs help Partners through their APN journey and is your key resource.
WWPS Partner Development Manager	Your go-to AWS person if you are working on a Public Sector opportunity. Worldwide Public Sector PDMs help Partners in their APN Journey for Public sector competencies.
AWS Partner Success Manager (PSM)	PSMs are in the field connecting AWS Sales teams directly to the vast community of AWS Partners. They are experts on Partner solutions and help drive Partner go to market strategies for Sales teams.
AWS ISV Success Manager (ISM)	ISMs help ISVs co-sell with AWS (e.g. sales pipeline review, sales enablement activities, lead generation and management to ensure no lead gets left behind).

Request Channel Connection with AWS Secure Connect App on Slack

The ACE Pipeline Manager provides users with the ability to request instant connection with their AWS Opportunity Team within ‘Collaboration Channels’ tab within an Opportunity Record . To check if your opportunity is eligible for Slack channel. Opportunities from ACE Eligible partners with NDA that are high dollar from open (Qualified to Committed) co-sell projects are eligible for Collaboration.

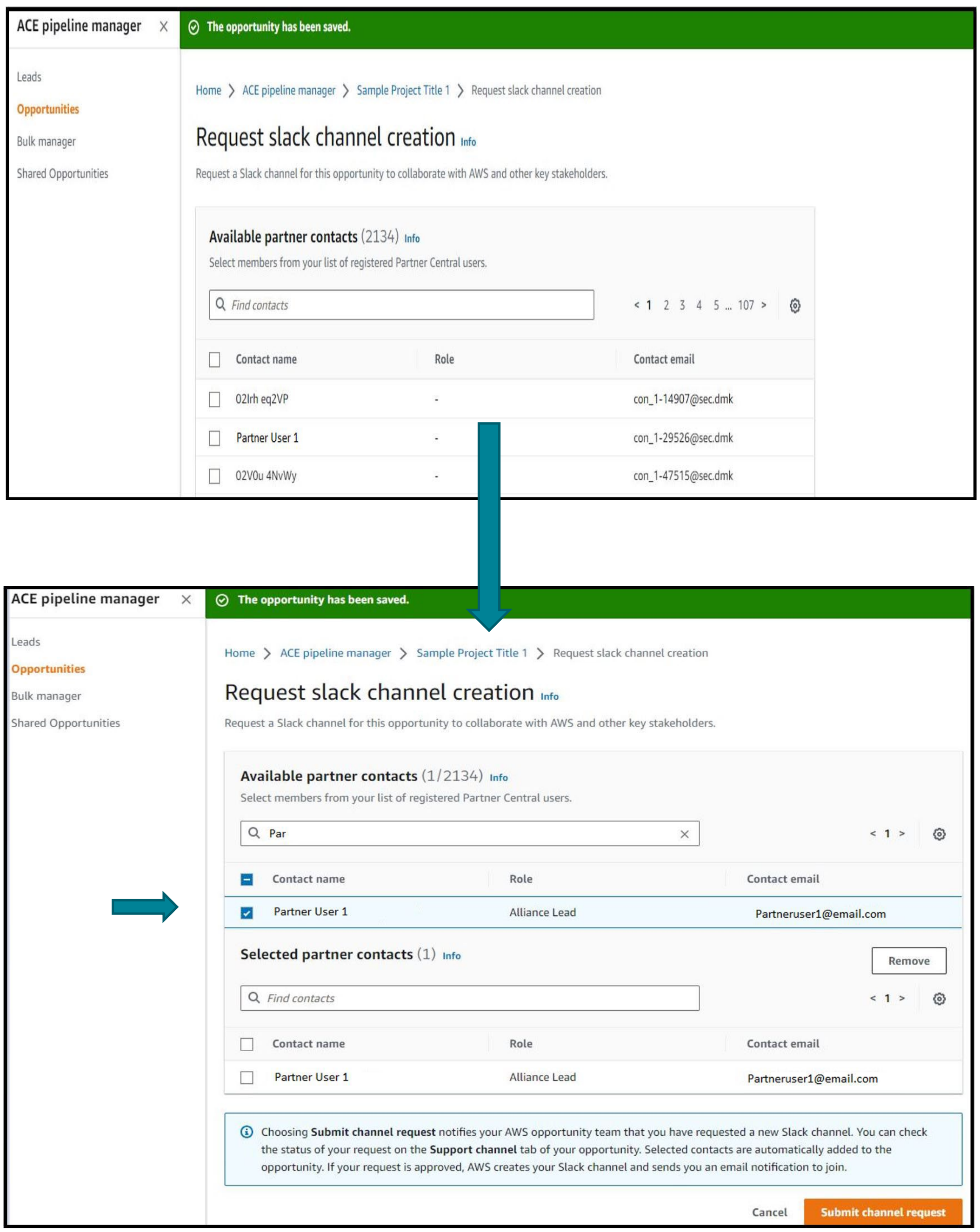
1. Navigate to a validated opportunity. A validated opportunity will show a status of ‘Approved’.
2. Click into the opportunity by clicking on ‘Update’ or the ‘Customer Company Name’.
3. Click on ‘Collaboration Channels’.



Request Channel Connection with AWS Secure Connect App on Slack

Continuation on channel setup instructions

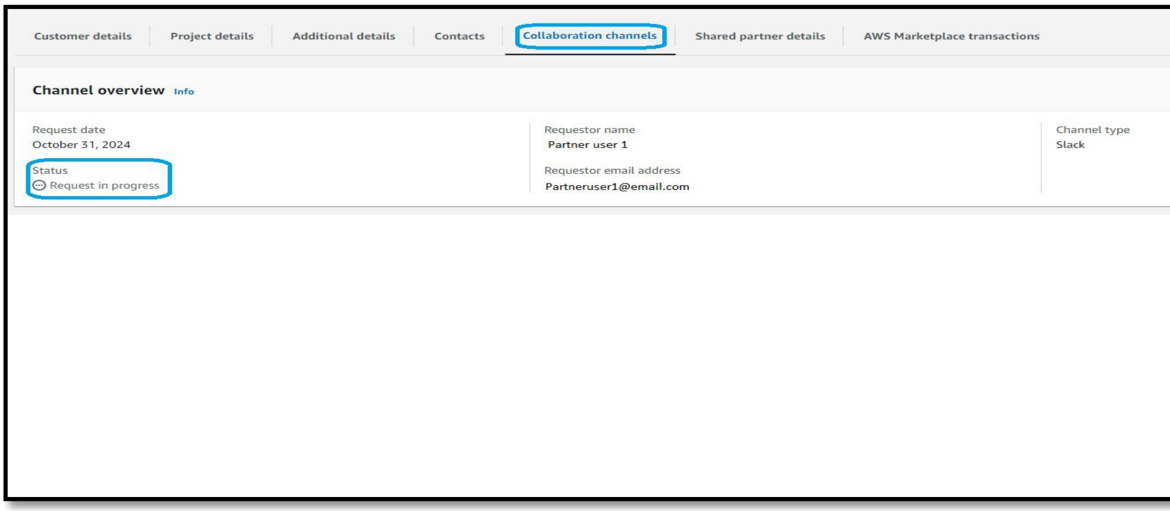
4. Once you are in the ‘Collaboration Channels’ tab select ‘Request slack channel creation’
5. Search for additional users within your organization you want to be included on the slack channel
   - ! Note: Only Partner Users that are associated with the Opportunity can be added to the channel



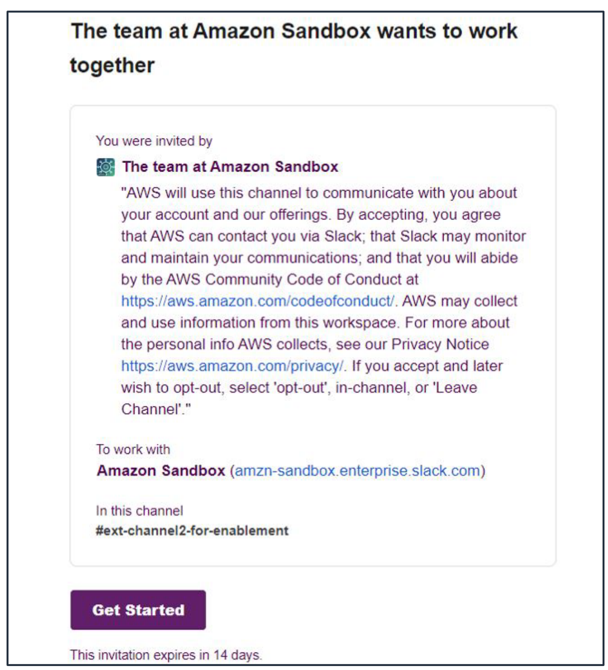
Channel Connection Setup with AWS Secure Connect App on Slack

Continuation on channel setup instructions

6. After selecting additional users to be added to the channel, you will get prompted back on the original page with a status tracker on your Slack request
7. Once approved, status will change in the 'Channel overview' and an email will be sent from Slack or an notification in Slack directly (if you have it installed)



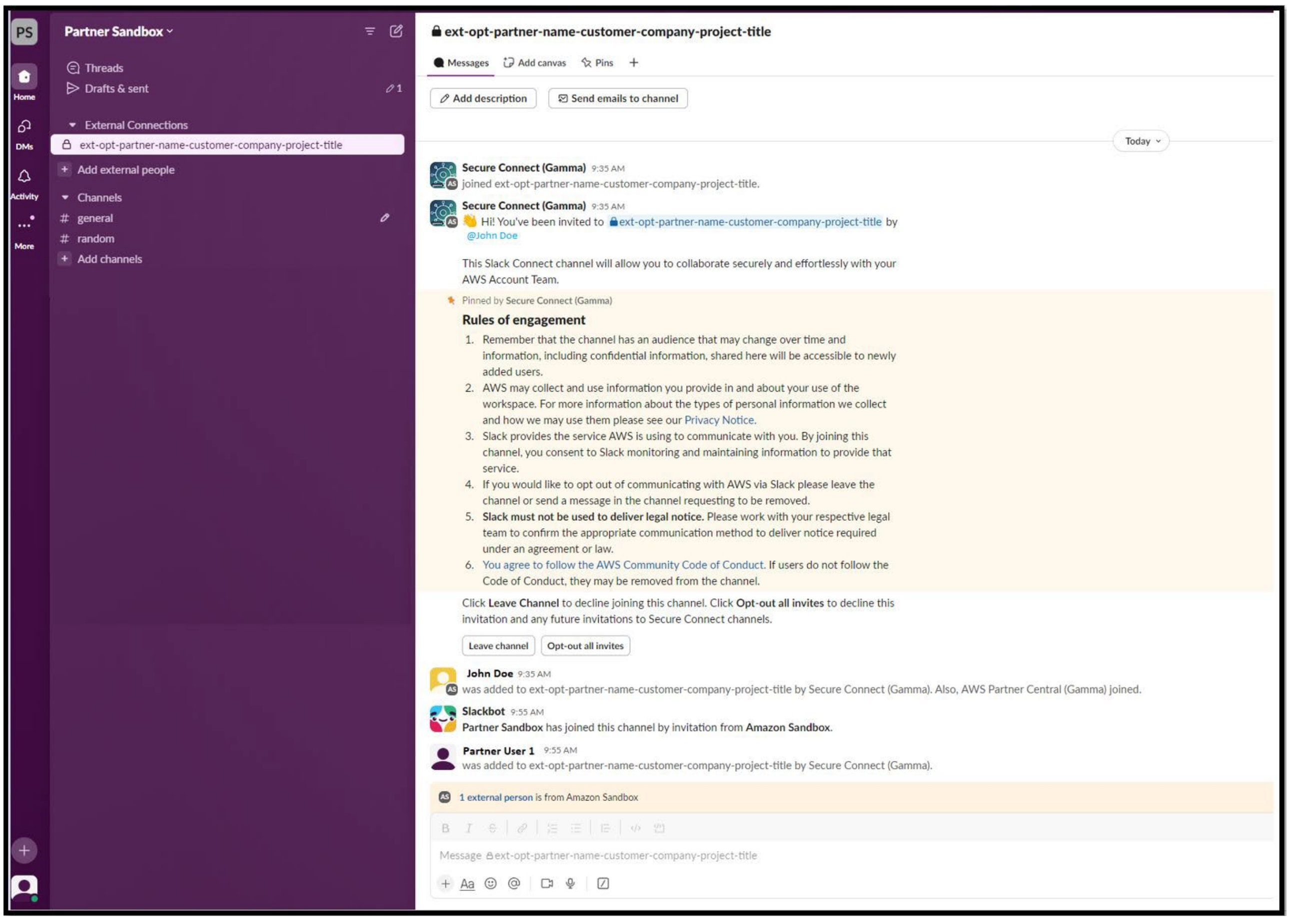
- ❑ Email will come from Slack with the following message. If you do not have a Slack license you can install the free version .
- ❑ You will have 14 days to accept the invite before it expires.



Channel Connection Setup with AWS Secure Connect App on Slack

Continuation on channel setup instructions

8. Navigate into your Slack App to see channel creation
9. Within the channel you will see AWS Opportunity Team members you can start exchanging updates

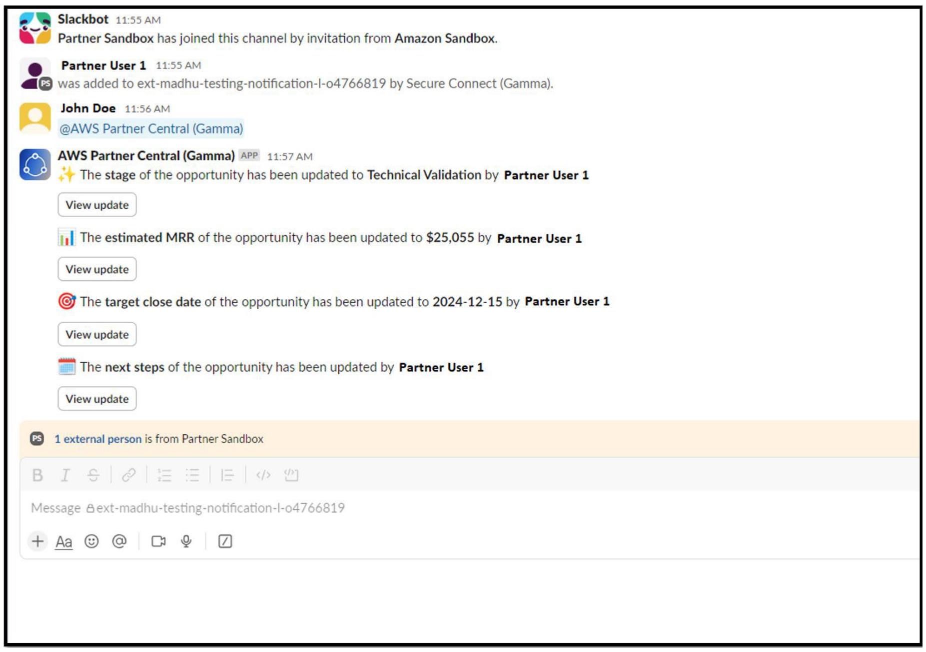


Notifications on Opportunity Channels AWS Secure Connect App on Slack

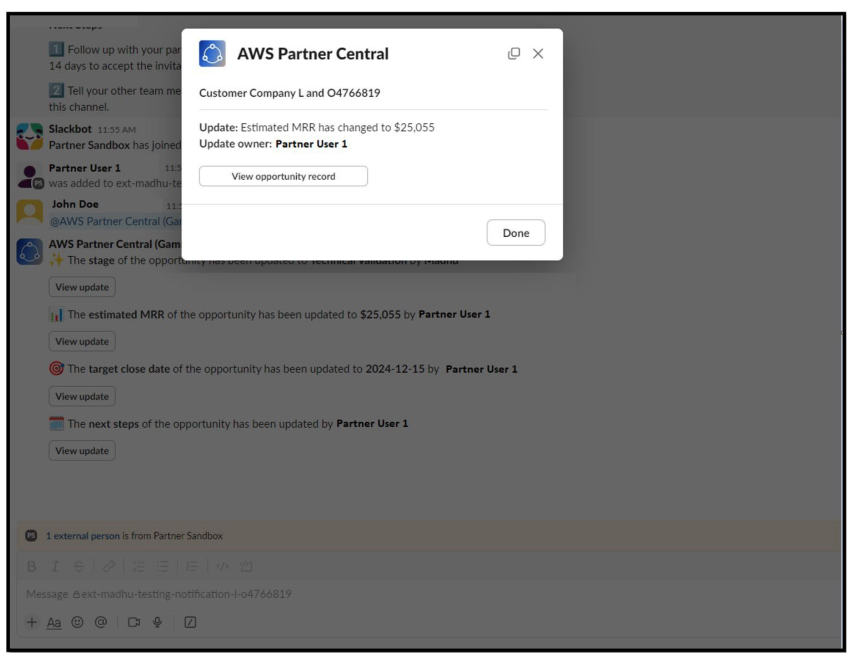
Continuation on channel features

10. Opportunity Channels can show updates on pipeline progression in ACE, when a change happens a notification will appear in the chat that you can view with more information

11. Notifications will only reflect updates in 1/Change of Stage, 2/ Change of 'Estimated AWS monthly recurring revenue (Estimated MRR)', 3/ Target close date change, and 4/ next steps updated by either AWS or Partner



You can click on each notification to see more details on the change.

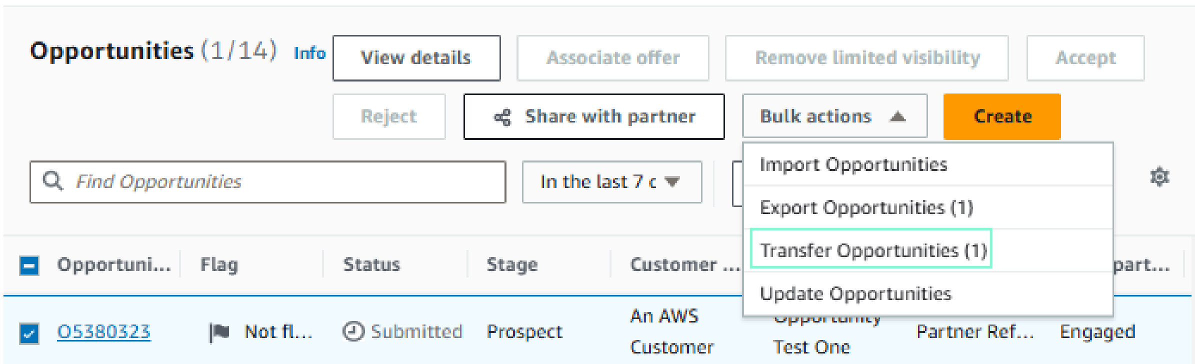


Opportunity Transfer

Partner Users have the capability to transfer ownership of opportunities within their ACE Pipeline Manager to another active user within their partner organization (Alliance Lead, Alliance Team, ACE Manager, ACE User).

To transfer a **single opportunity**, from the Opportunities tab in the ACE Pipeline Manager:

1. Select the single opportunity you want to transfer.
2. Click on ‘Bulk Actions’ > ‘Transfer Opportunities’.



3. Type in the name of the new Opportunity Owner to search and click ‘Transfer’.

Note: Opportunities can only be transferred to users with permissions to the ACE Pipeline Manager. See section on Permissions for further information.

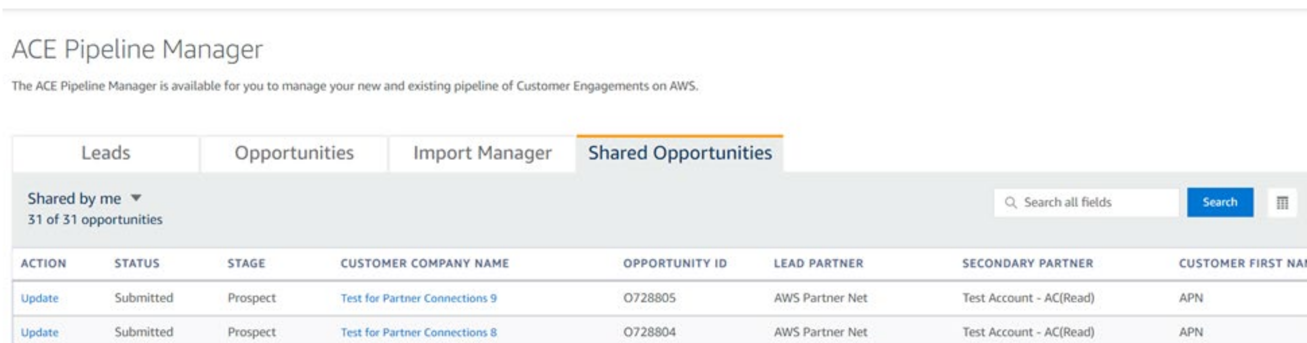
To transfer **multiple opportunities** in bulk, please refer to the Transfer Lead and Opportunity Ownership section.

Old experience Partner Connections

This experience is only for Distribution – Reseller relationship it will be deprecated in 2025

Sharing Opportunities for Distributors and Distribution Sellers

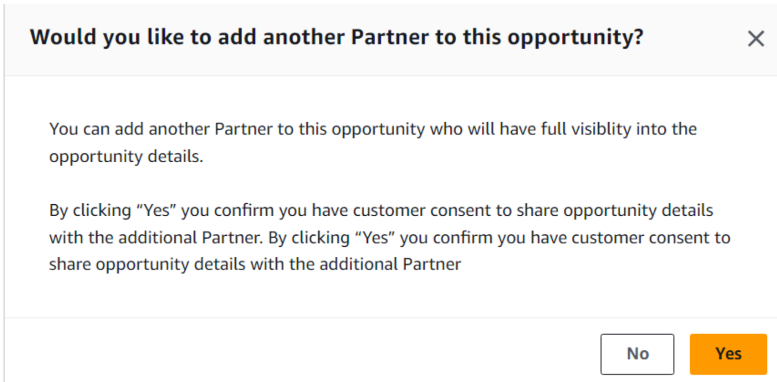
When an active Distributor/Distribution Partner agreement is in place, the Partner submitting the opportunity (Lead Partner) is able to add one or more ‘Secondary Partners’ upon submission or to an active opportunity.



Note: A Lead Partner is defined as the Partner submitting the opportunity. A secondary Partner is defined as the Partner receiving the opportunity. Distributors and Distribution sellers can view shared opportunities from the ‘Shared Opportunities’ Tab in Pipeline Manager:

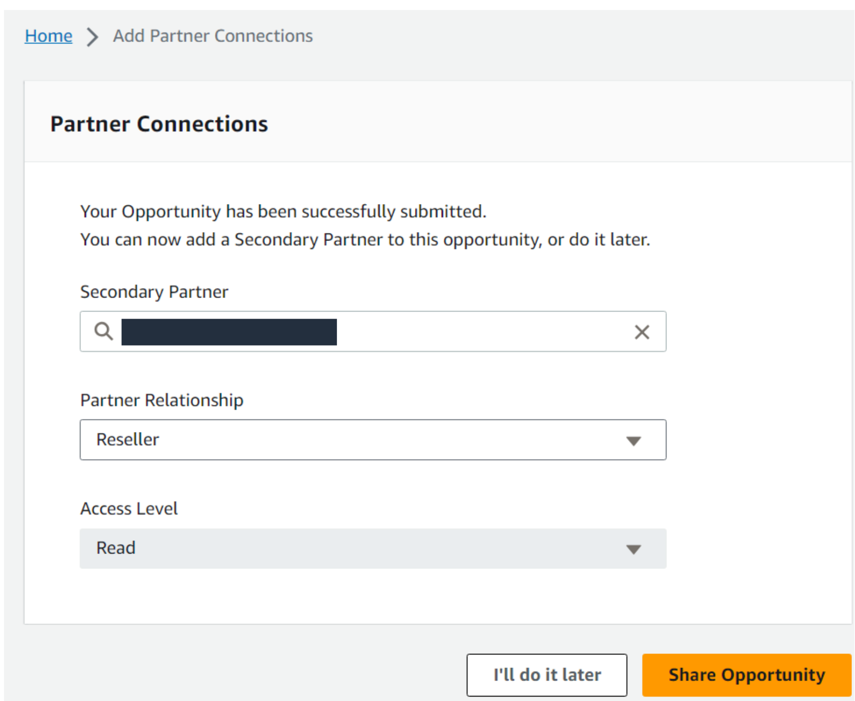
How to add a Partner Connection during opportunity submission

1. After completing all information on the opportunity, click on 'Submit'
2. You will see the following banner asking if you want to add another Partner to the opportunity. Click on 'Yes' to add the Partner after creation.



Note: this option will only be visible to AWS Distributor Program Partners

3. Search for the Secondary Partner you want to attach to the opportunity and indicate the type of relationship. Then click 'Share Opportunity'



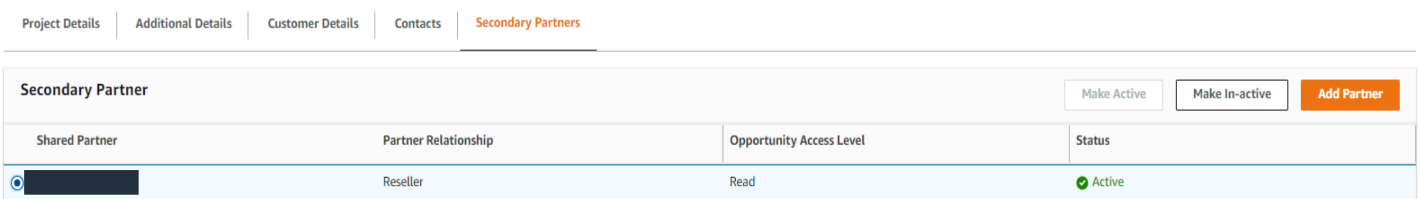
Note: currently, secondary Partners have read access only, and 'Access Level' is a locked field. Begin typing in the Partner name or domain name in the 'Secondary Partner' field. The field will auto-populate when an existing Partner relationship matches the entered keywords:

How to add a Partner Connection to an existing active opportunity

If you selected 'No' or 'I'll do it later' at the time of opportunity submission, and the opportunity is still active (is not Stage = 'Closed/Lost' or 'Launched' or Status = 'Draft' or 'Rejected'), you can still add a secondary Partner. Follow these steps to add a Partner to an existing opportunity:

1. Open the opportunity within Pipeline Manager, 'Opportunities' tab by clicking on 'Update' to open the opportunity:

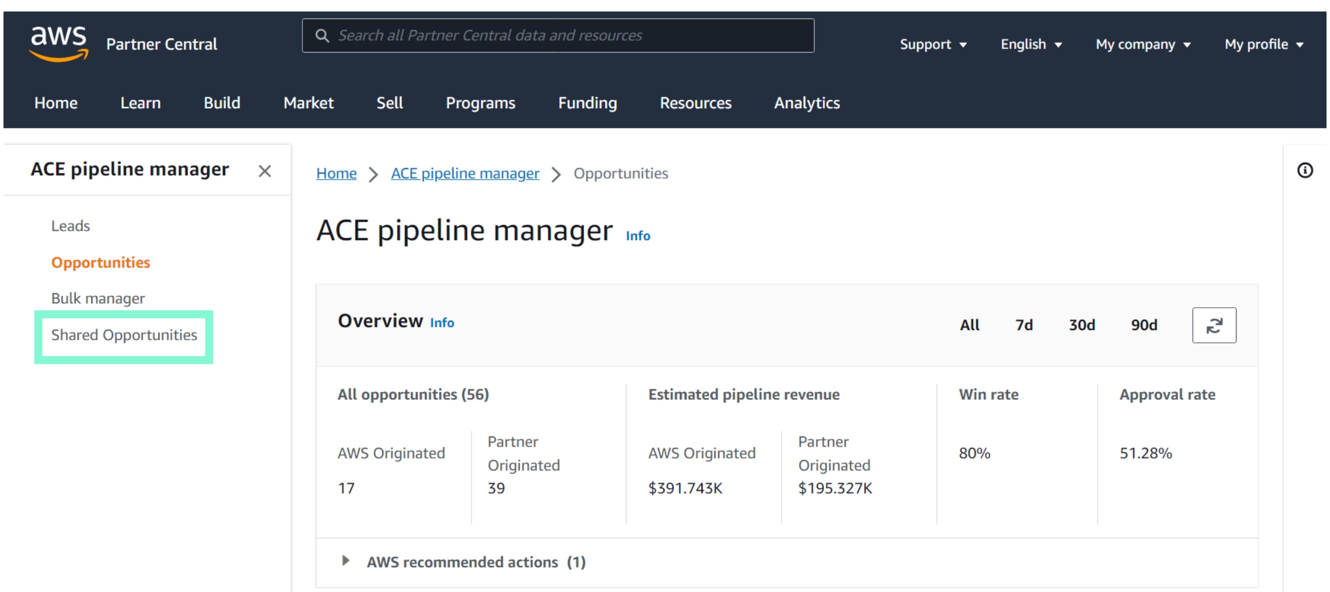
2. Once in the opportunity screen, click on the tab that says 'Secondary Partners.' You should not see a Partner shared on the opportunity at this point. Click 'Add Partner' in the right corner:



3. Follow step 3 from the previous section to complete the opportunity share. ***Note: currently, secondary Partners have read access only, and 'Access Level' is a locked field.***

Shared Opportunities Tab

To view your opportunities with secondary Partner involvement, navigate to the 'Shared Opportunities' tab in ACE Pipeline Manager. The default list views are 'Shared by me' and 'Shared with me.' The 'Shared by me' view is where a Lead Partner can see the opportunities they have shared with secondary Partner(s). The 'Shared with me' view allows the secondary Partner(s) to see the opportunities a Lead Partner has shared with them:



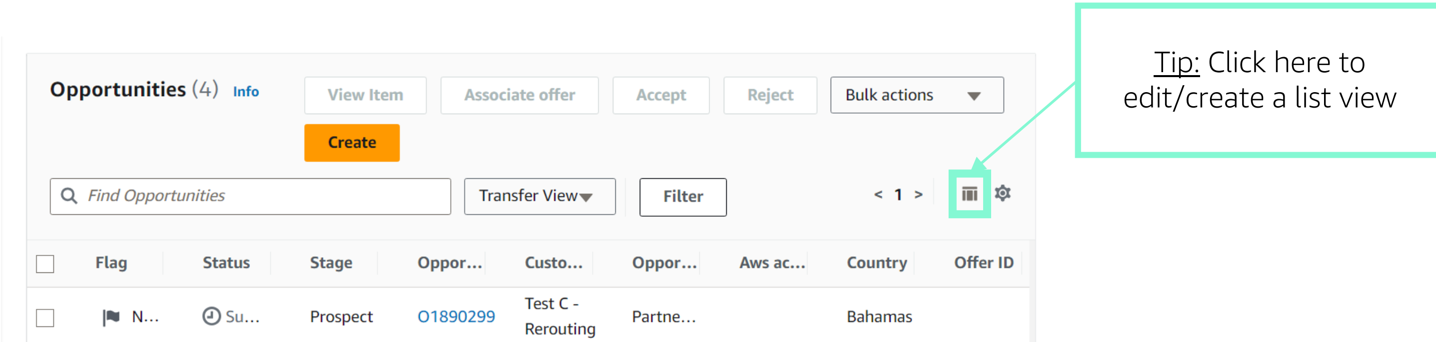
Custom List Views

In addition to the default views ‘Shared by me’ and ‘Shared with me’, custom list views can also be configured.

To create a custom list view, move toward the left side of the navigation bar and click on the downward facing arrow next to ‘Shared by me’ that says ‘Create new view’.

Enter a name for your custom view (required). You can add optional filters to organize your pipeline.

To change the display columns of your custom list view, click on the table icon on the right side of the screen. Use the checkbox selector to add the fields that you want to add to your custom view:

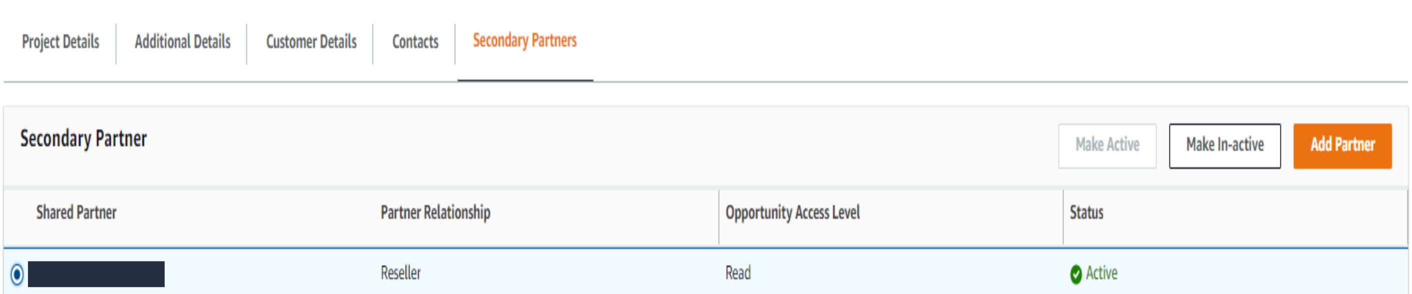


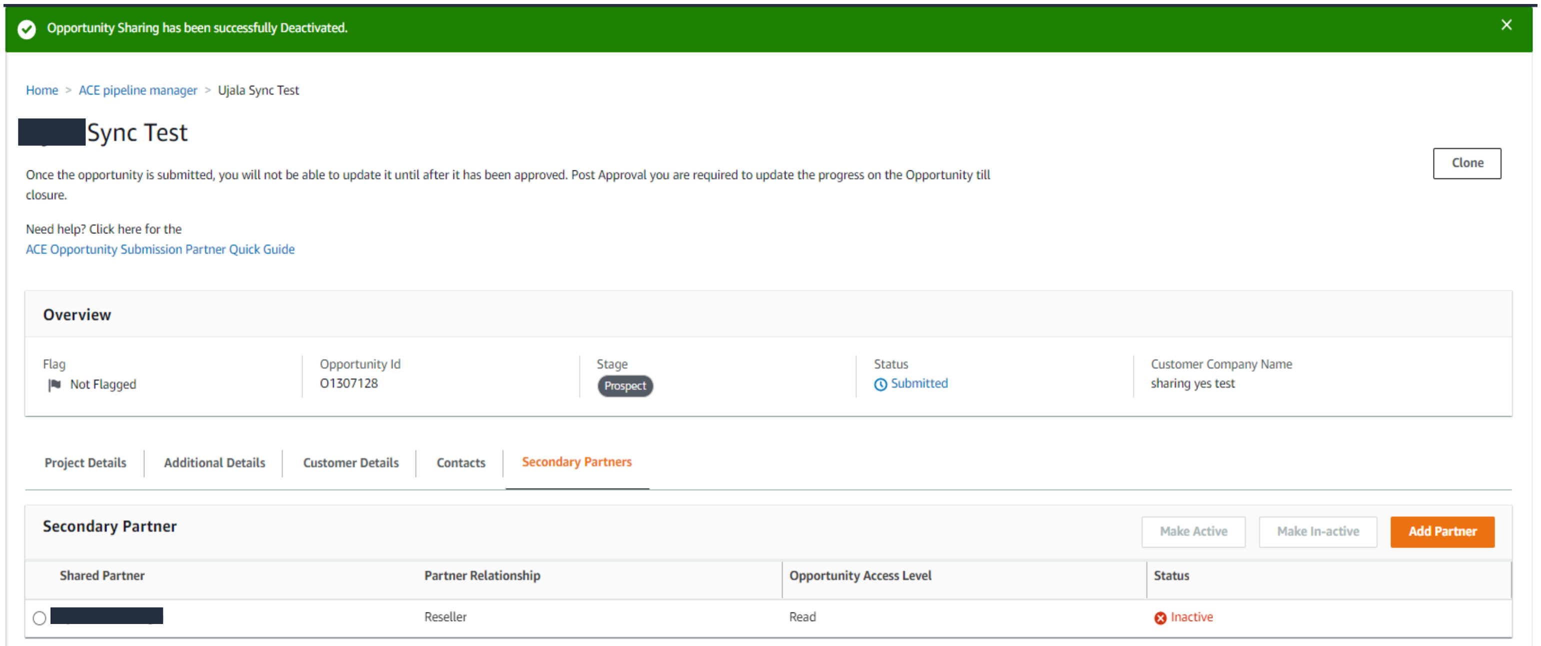
How to replace/remove existing Partner Connections from an opportunity

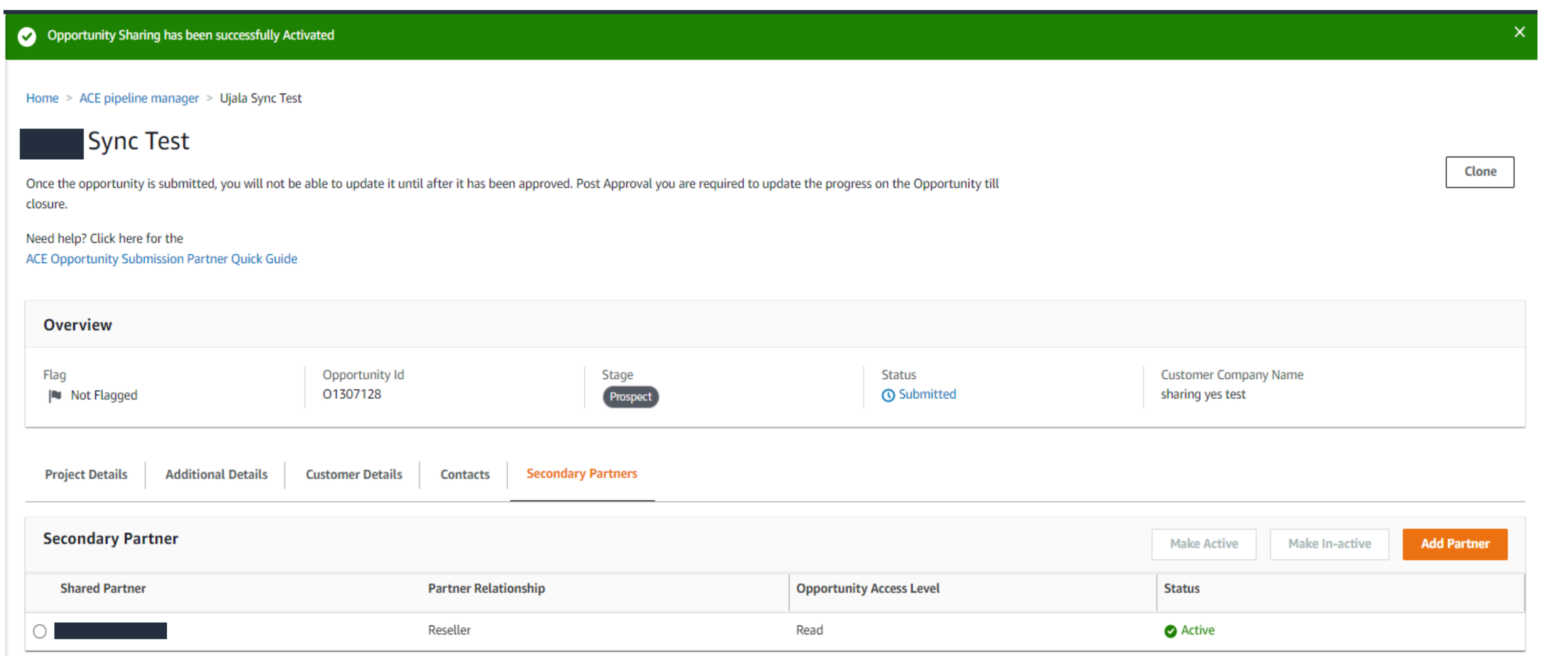
If you are the Primary Partner, you can edit the secondary Partner(s) involvement on an opportunity, provided the opportunity is still valid (not in Stage = ‘Closed-Lost’ or ‘Launched’ or Status = ‘Draft’ or ‘Rejected’). Multiple Partners can be added to an opportunity, but only one can be made active. In theory, you could add all your existing relationships as Secondary Partners on the opportunity, and make all of them inactive until the secondary Partner participation is confirmed:

1. To remove a Partner connection navigate to the ‘Shared Opportunities’ tab and click ‘Update’ on the opportunity from the list view ‘Shared by me’ (or a custom view you have created to organize your pipeline):

Navigate to the ‘Shared Opportunities tab and click ‘**Make Inactive’** to remove the Partner:







Even if you have added multiple Partners to an opportunity, only one can be activated at a time. To replace one secondary Partner with another of your relationships, click 'Make In-active' next to the name of the Partner you would like replaced.

Then, click '**Make Active'** for the secondary Partner you would like to involve on the opportunity.

Once the change has been made, the Active partner will appear at the top of the 'Shared Partner' list and a success message will appear.

How to associate a Marketplace Private Offer to an opportunity?

Marketplace Private offers can be associated to any opportunity where the Status is Approved and the opportunity is not Closed/Lost.

To associate a Marketplace Private Offer to an opportunity, the first step is linking your AWS Marketplace seller account with your AWS Partner Central account.

Linking your AWS Partner Central account to an AWS Marketplace account

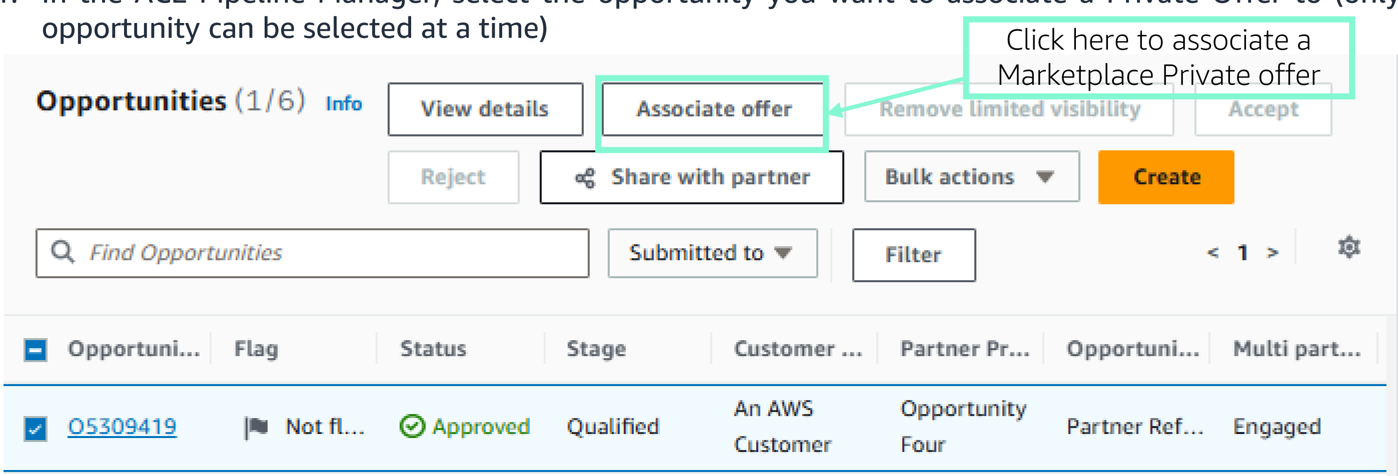
1. Sign in to AWS Partner Central as a user with the Alliance Lead or Cloud Admin role.
2. In the AWS Marketplace section of the AWS Partner Central homepage, choose Link Account.
3. On the AWS Marketplace page, choose Link Account.
4. Choose IAM user.
5. Enter the AWS Account ID for the AWS Marketplace account.
6. Choose Next.
7. Sign in to AWS Marketplace.
8. Choose Allow to acknowledge that you authorize the connection between your AWS Partner Central and AWS Marketplace accounts and users.

For more information refer to the **AWS Partner Central and Marketplace account linking guide**

Note: only the Alliance Lead or Cloud Admin User can associate both accounts

Associating a Marketplace Private Offer

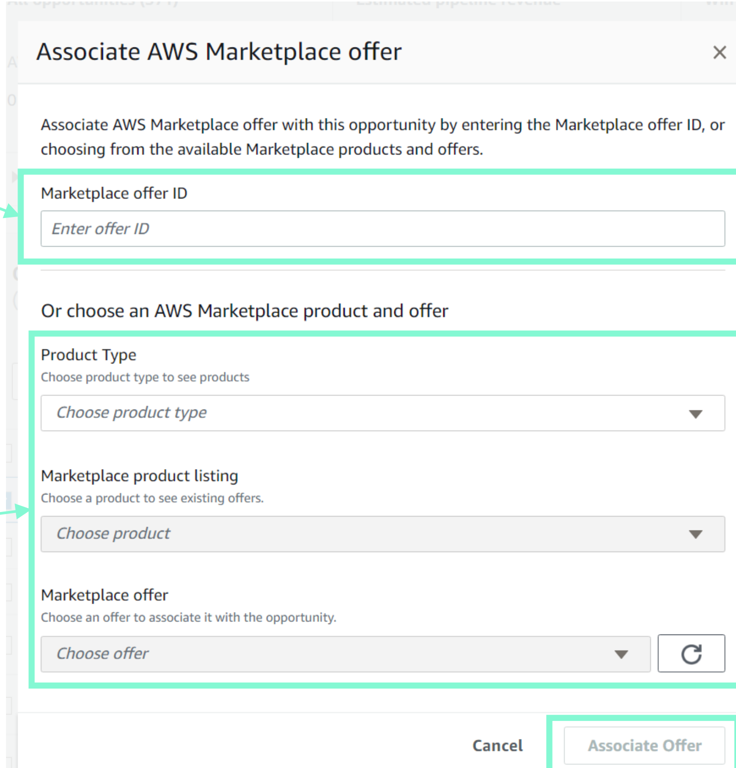
1. In the ACE Pipeline Manager, select the opportunity you want to associate a Private Offer to (only 1 opportunity can be selected at a time)



Note: alternatively you can access the opportunity details, select the 'AWS Marketplace transactions' tab and associate an AWS Marketplace Private offer from there

2. **If you have the Marketplace Private Offer ID**, input the ID in the 'Marketplace offer ID' field

Input Marketplace offer ID



3. If you **do not** have the Marketplace Private Offer ID:
    1. Select the Product Type for the AWS Marketplace Listing
    2. Select the Marketplace product listing
    3. Select the Marketplace Offer you want to associate

Select Marketplace Offer

4. Click on Associate Offer

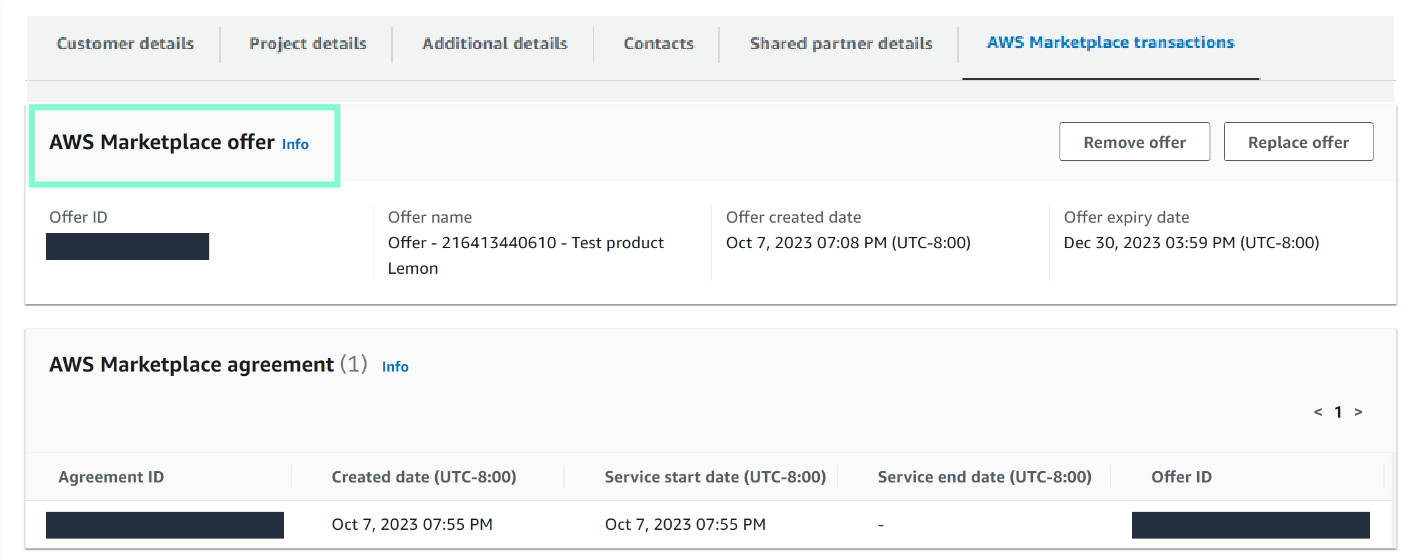
Notes:

- Each Marketplace Offer can be associated to only 1 opportunity.
- Only Marketplace Offers that are not expired or which have an Agreement ID will be displayed

Launching an Opportunity with a Marketplace Offer

To launch an opportunity with a Marketplace Offer attached you will need to make sure that there is an agreement associated with that opportunity. You can see that information on the opportunity details inside the AWS Marketplace transactions section.

For opportunities where the Private Offer has expired and there is no agreement you will only be able to mark them as Closed/Lost.



Partner Connections

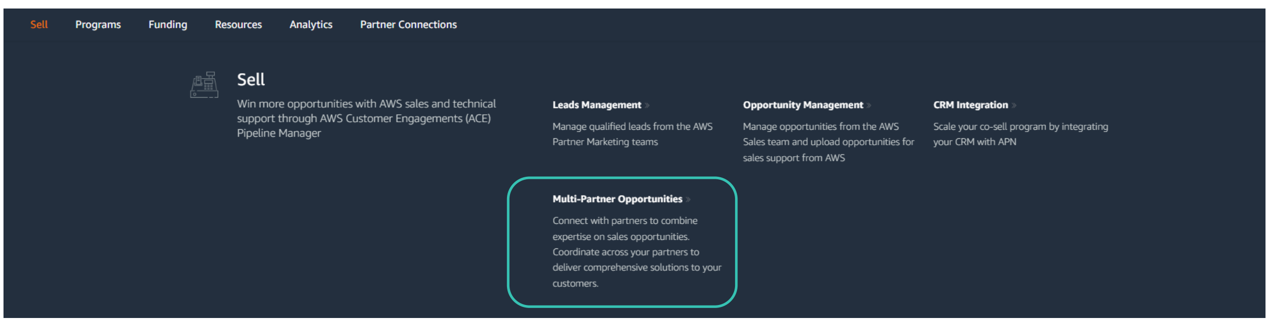
Multi-partner opportunities – Through secure collaboration and joint sales with AWS and other AWS Partners, partners can now seamless manage pipeline across the both AWS and other collaborating partners on open pipeline. Leveraging Partner Connection, you can now add or remove partners from shared opportunities. You can have up to 10 partners associated to a given opportunity. Although visibility of shared opportunity is across all the partners and AWS, each partner will be responsible to manage their pipeline progression. This feature is available for both AWS Originated and Partner Originated opportunities, for partners that have completed account linking between AWS Partner Central and AWS account, mapped and associated AWS Partner Central Users with AWS IAM roles, and have signed ACE Terms and Conditions.

AI- Recommendation for Partner Collaborations on Opportunities – Through AI-Recommendation features, partners will get a recommended list of partners that could be good fit for collaborating on a given opportunity. These partner profiles will be filtered based on the opportunity and account specific information allowing you connect with new ACE-Eligible partners.

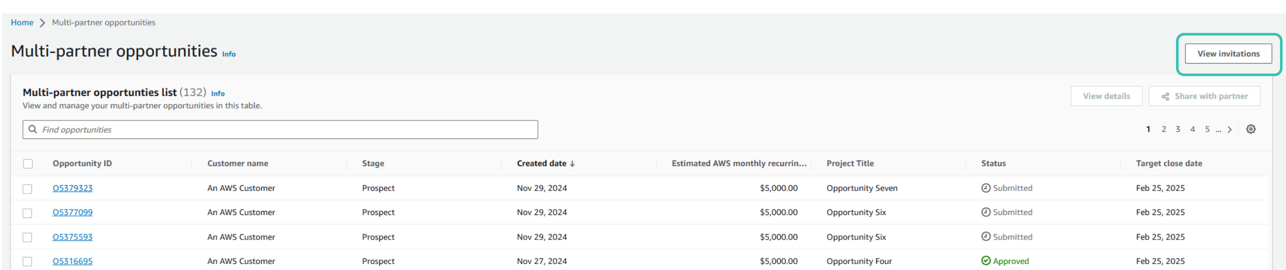
To learn more about Partner Connections account base feature check out Guide for more.

Multi-partner opportunities dashboard

In order to manage opportunities with multiple partners associated, a new tab on your **Sell** head is visible.



Within this page, you will be able to review general information about multi-partner opportunities your organization is involved up until now. 'Multi-partner opportunities list' dashboard will show you pending acceptance opportunities. To review opportunities that are awaiting your acceptance, go to 'view invitations' tab.



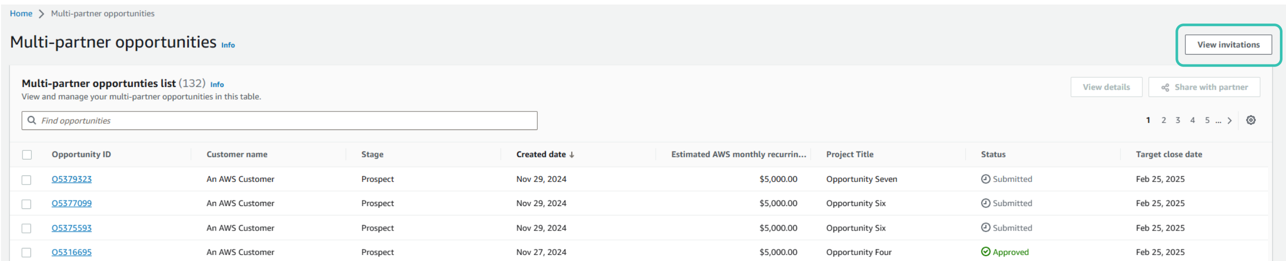
When you click on a particular opportunity ID, you will be taken to the said opportunity where you can update information using the 'edit' button on the top right corner of each tab as you are usually able to do. Additionally, a new feature will appear – 'share with partner' – that will allow you to share this opportunity with another partner.

Partner originated opportunities (Partner Referrals) can be shared from 'submitted' validation status.

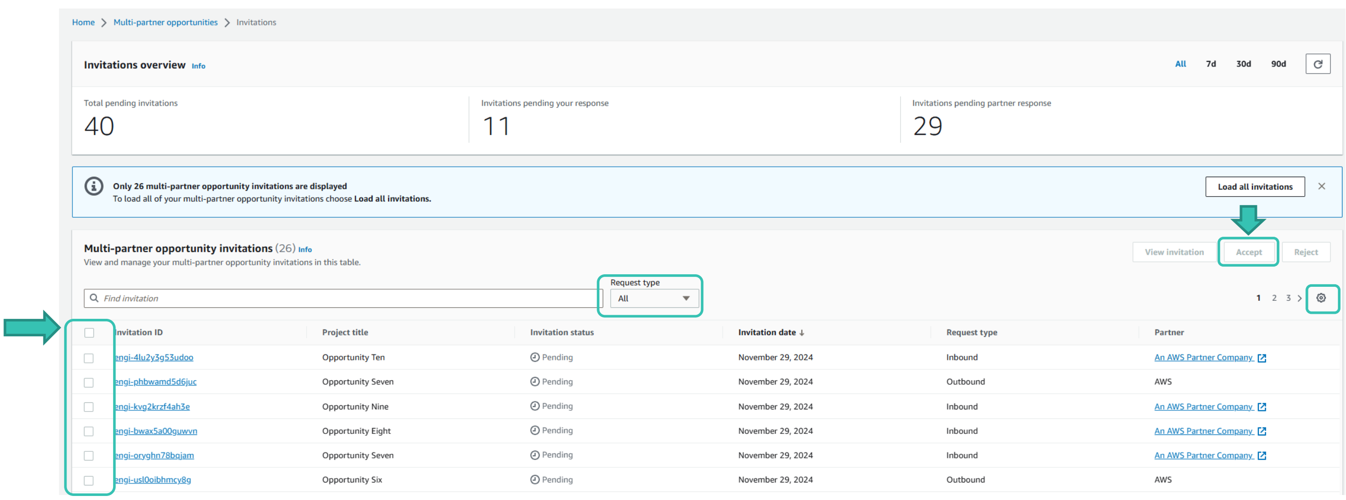
Partner Connections – Invitations Manager

Navigating through invitations of partner connections requests on opportunities. Follow these steps:

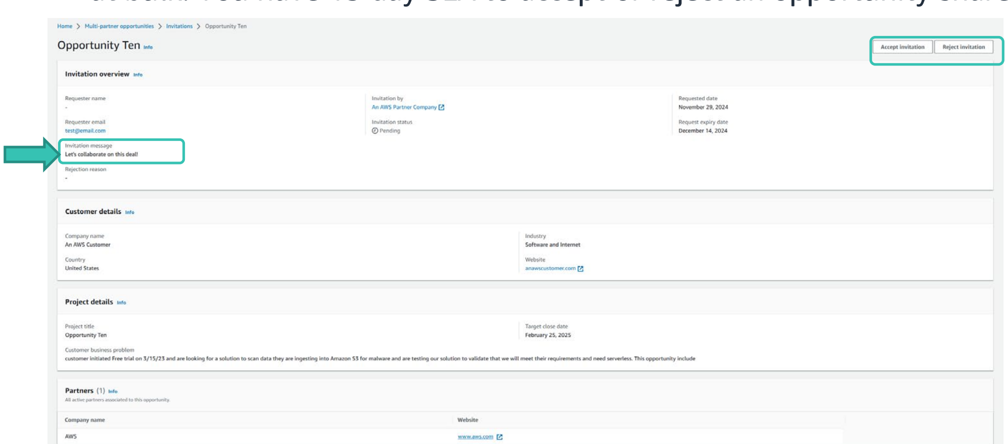
1. Navigate to Multi-Partner Opportunity tab



2. Click on ‘View invitations’



3. Review different request with ‘view invitation’ or clicking on the Invitation ID. Using the ‘gear’ symbol on the top right corner, you can calibrate your filter views to find the a specific invitation list. Using the checkmark option, you also have the option to select multiple or all invitations and accept/reject them at bulk. You have 15 day SLA to accept or reject an opportunity shared.



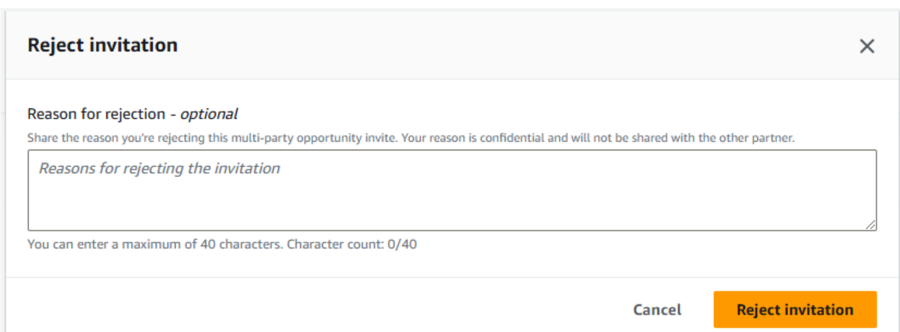
Note: Make sure to check partner’s invitation message to learn more about the opportunity.

Partner Connections – Invitations Manager

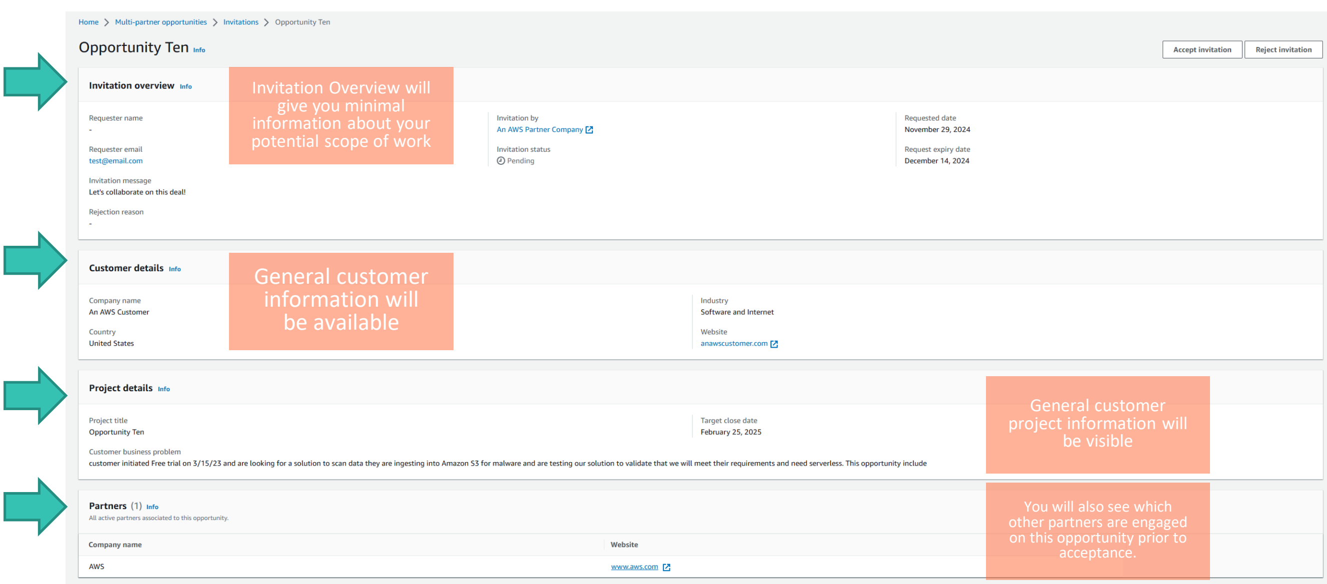
There are different invitations status that you should know in your invitations manager dashboard:

- ❑ Accepted – your organization has accepted the shared opportunity invitation
- ❑ Rejected – your organization has rejected the shared opportunity invitation
- ❑ Pending – the shared opportunity is awaiting your acceptance or rejection
- ❑ Withdrawn – the opportunity invitation has been withdrawn by the sharing partner

Rejections – when you are rejecting an invitation you will be prompted to provide an optional reason. In order to ensure AWS learns from your connection experience, we advise partners to provide reasons why you are rejecting a connection request.



Invitations information overview

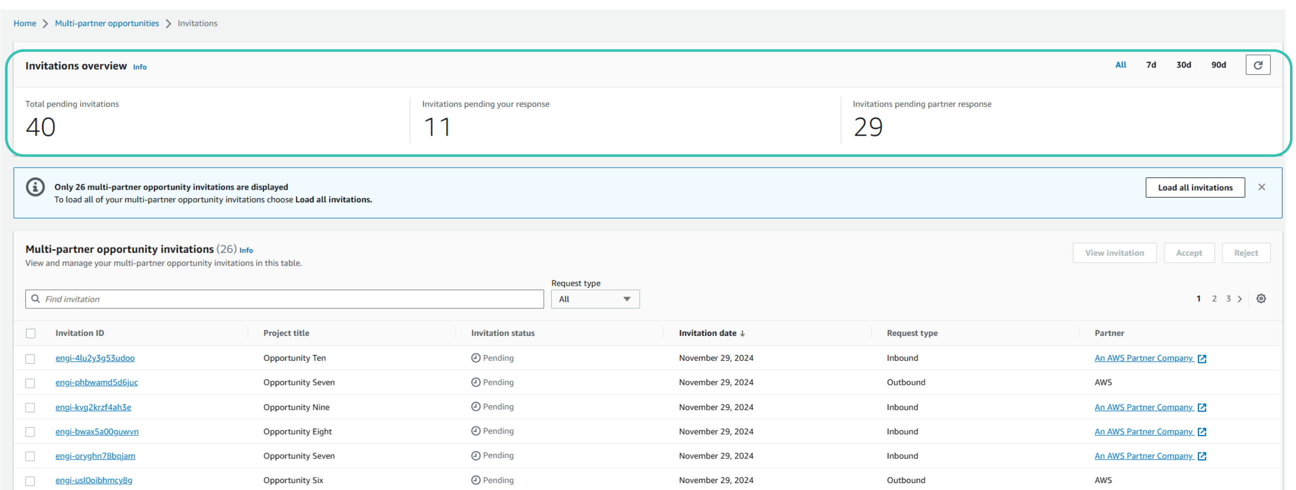


Partner Connections – Invitations Manager

Invitations Overview Dashboard – In order to help you gain insights into your organization's multi-partner collaborations, we have build a set of metrics you can keep track on how many connection requests are sent or received. Below is a summary of each metric's meaning:

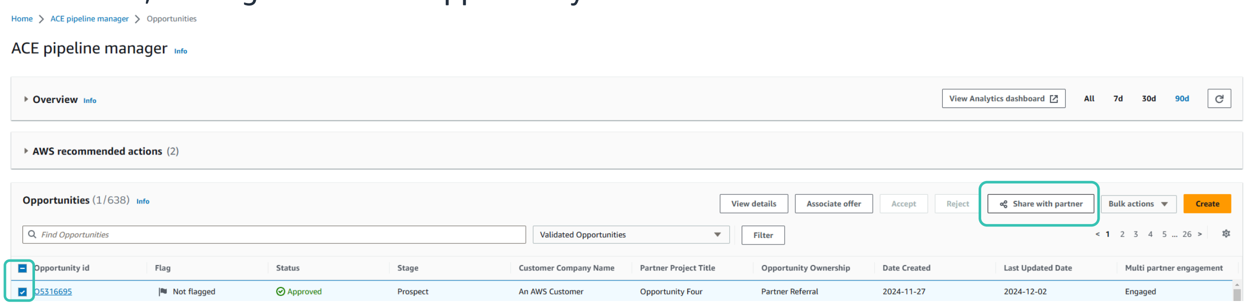
- ❑ Total pending invitations – included opportunities you've shared or received from other AWS Partners
- ❑ Multi-partner opportunities invitations sent **[Outbound]** – opportunities you've successfully shared with other partners
- ❑ Multi-partner opportunities invitations received **[Inbound]** – opportunities other AWS Partners have successfully shared with your organization.
- ❑ Timeline Snapshots – you can view dashboard snapshots
  - ❑ All – all the time
  - ❑ 7d – last seven days
  - ❑ 30d – last thirty days
  - ❑ 90d – last ninety days

Note: Metric values may vary slightly across Partner Central due to differences in system architectures and refresh rates.



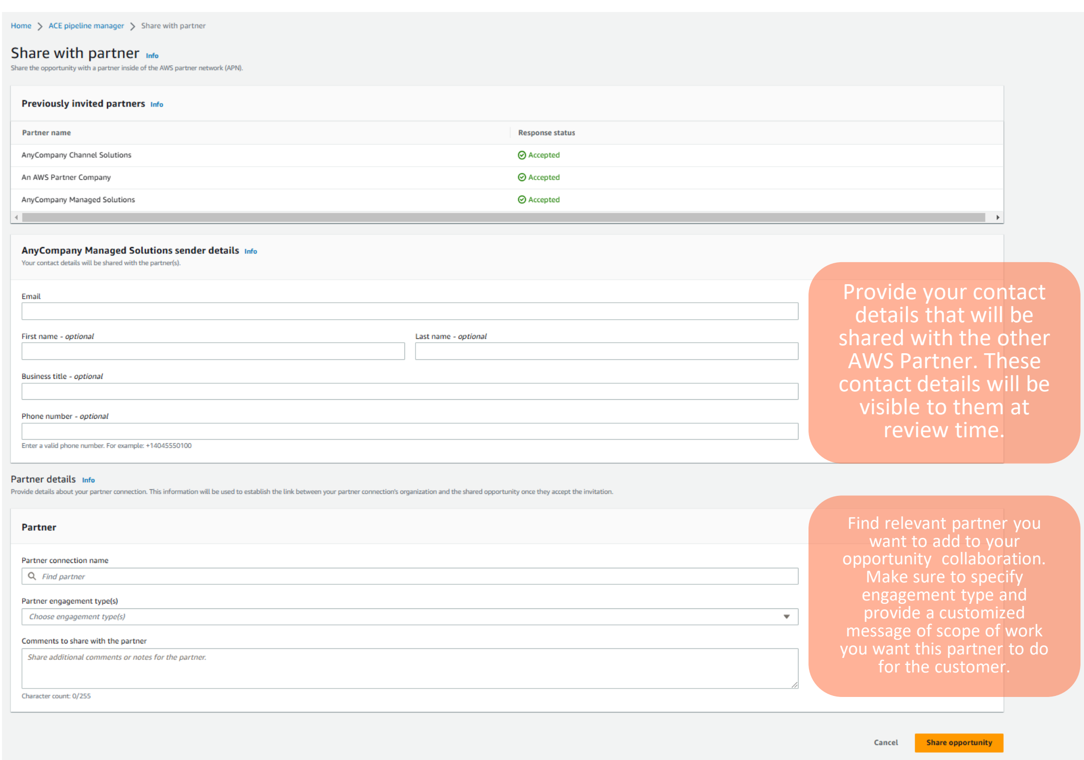
Partner Connections – ACE Pipeline Manager

You can share opportunities with partners not only through the Multi-partner opportunity dashboard, but also through the ACE Pipeline Manager. Checkmark the opportunity you wish to share and the grayed out 'share with partner' button will be ready. To ensure information is accurate, sharing is done one opportunity at the time.



Sharing an opportunity

After you select 'share with partner' either in ACE Pipeline manager, on a opportunity directly, or in the multi-partner opportunity tab. A sharing page will appear where you are to complete information that will be shared with another partner. To ensure you keep track on all partners that are already engaged, a 'previously invited partners' tab will appear on the top of the page where you can monitor which partners are engaged, pending, or rejected your connections for this opportunity.



Note: In custom message you should provide different set of information so that the other partner knows their role in this project. Some best practices on sharing:

1. State the purpose of the collaboration
2. Explain its importance to the customer
3. Highlight how partners can benefit of this joint collaboration
4. Indicate opportunity timing of completion or highlight an important milestone/deadline that requires their assistance

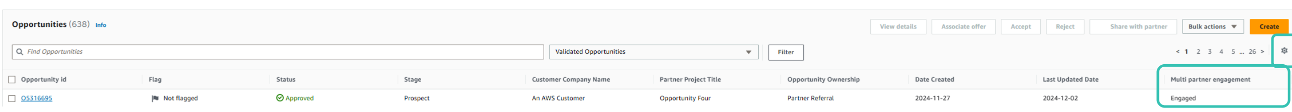
Important: You should ensure that any opportunity sharing done has relevant consent obtained prior to sharing (customer and other partners).

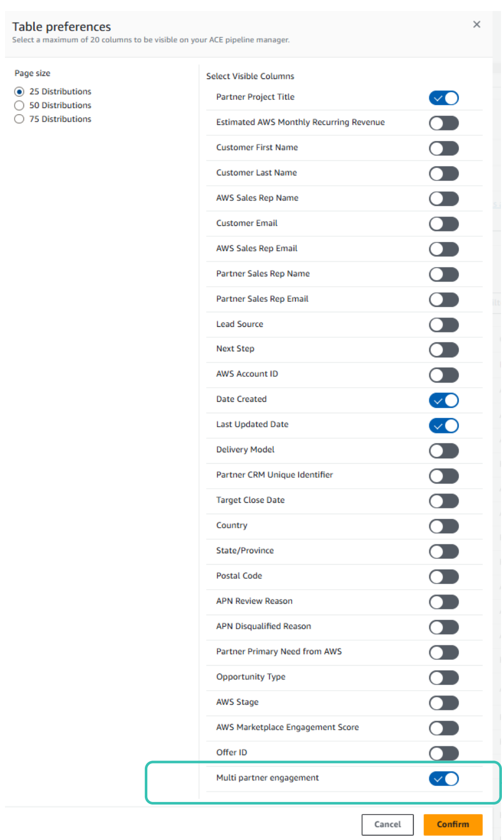
Partner Connections – Sharing Opportunities

Once the invite has been sent to the other AWS Partner, a green banner will appear on your ACE Pipeline Manager dashboard indicating the sharing status and link to ‘view invitation’ you shared.

Custom View new feature

In the ACE Pipeline Manager you will now have a new custom view display that you can keep track of – Multi-partner engagements. If this field has ‘Engaged’ status that would mean that this is a multi-partner opportunity.





Note: To ensure that this display appears, check your display settings using the ‘gear’ symbol on the top right corner.

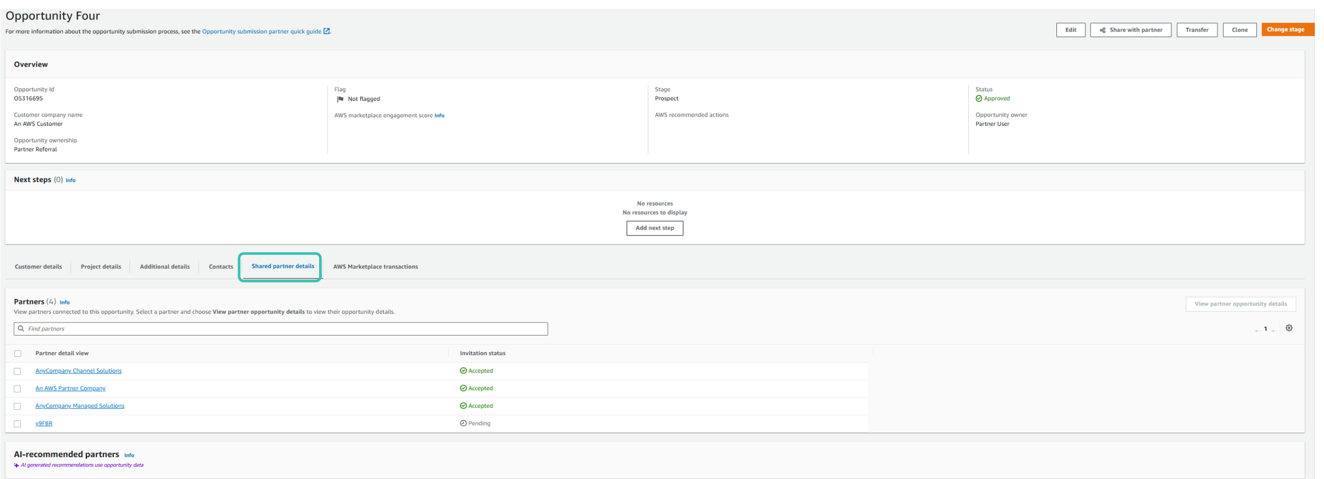
Partner Connections – Opportunity Management

Managing multi-partner opportunities

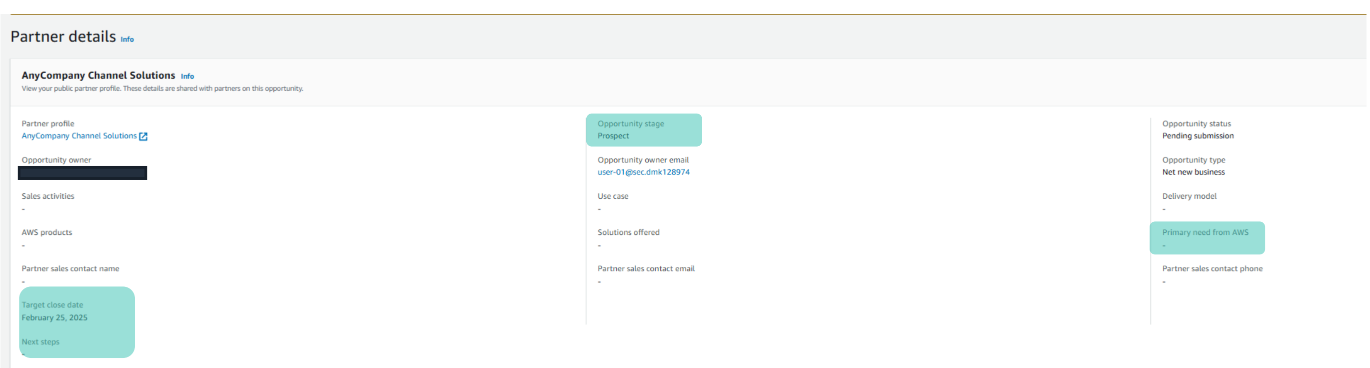
On the opportunity page a new tab will appear for opportunities with collaborating partners – '**Shared partner details**'. Make sure to review the AWS Partners who have been engaged with the opportunity in order to keep track of pipeline progression across the board. You will observe that AWS is listed as an engaged partner on your opportunities. This is because AWS collaborates with you on these projects on different levels of engagement.

Only opportunities that are for National Security or Limited Visibility **do not have** 'share with partner' option.

To view a snapshot of the opportunity status shared by other AWS Partners, select a specific AWS Partner and choose **'View partner details.'**



View partner updates



In partner details, you will see how the other partner is progressing in terms of 'stage', 'target close date' , their primary need from AWS, any 'next steps' they are communicating on this opportunity. Products and solutions will also be visible. As you can see their updates, these partners will see your updates as well.

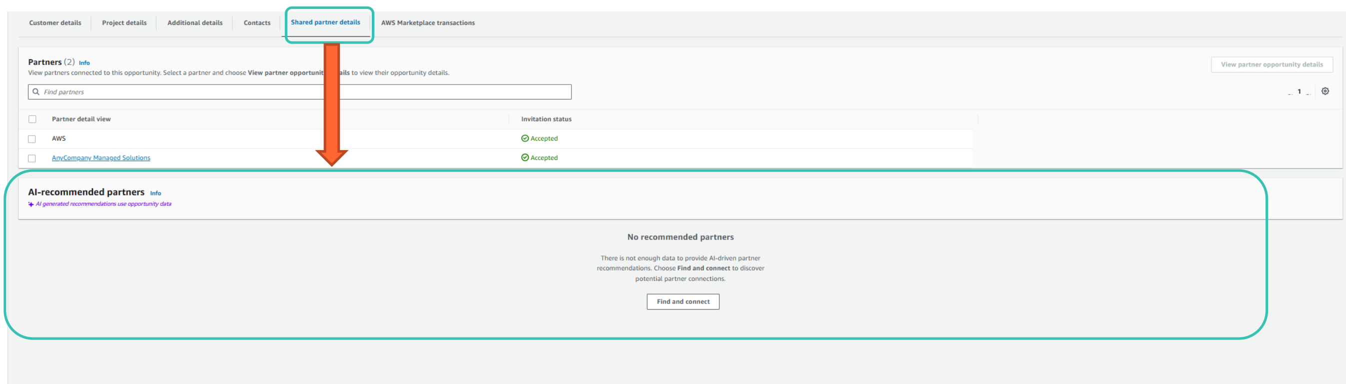
Partner connections – AI Recommended partners

AI – Recommendation on Opportunities

On any given open opportunity (i.e. Prospect – Committed) in the ‘shared partner details’ tab on an opportunity you will see the ‘AI-recommended partners’ sub-tab. Excluding Limited Visibility and National Security Opportunities.

Recommended connections suggest connections with ACE-eligible partners that compliment your solutions and expertise. These recommendations are generated by an AI model that analyzes your Partner Central profile, including your solutions, products, and use cases, to identify suitable matches.

These recommended connections are designated to help you discover and connect with partners you may not have previously considered. By expanding your network , you can explore new collaboration opportunities.



If no matches are found, the recommendation engine will take you to the master Partner Connections directory of partners in ‘Find and connect’ tab. You can calibrate a filter relevant to this opportunity to establish a connection request with other AWS Partner.

Leads

The Leads tab allows you to accept, manage, and report back updates on lead engagements shared by AWS and convert those lead engagements to opportunities.

The Alliance Lead maintains sole ownership, edit access, and visibility to lead information. In circumstances where lead ownership is assigned to a non-Alliance Lead, only the selected non-Alliance Lead and Alliance Lead will have visibility and edit access of leads.

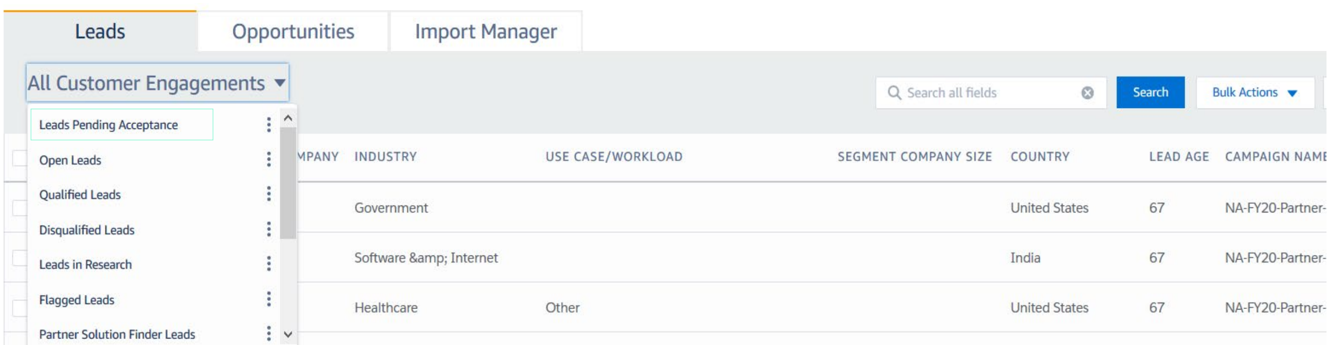
Note: AWS Partner Solutions Finder (PSF) Leads are only visible to the Alliance Lead and they will receive an automated notice each time a lead is generated through their PSF listing.

Accept Leads

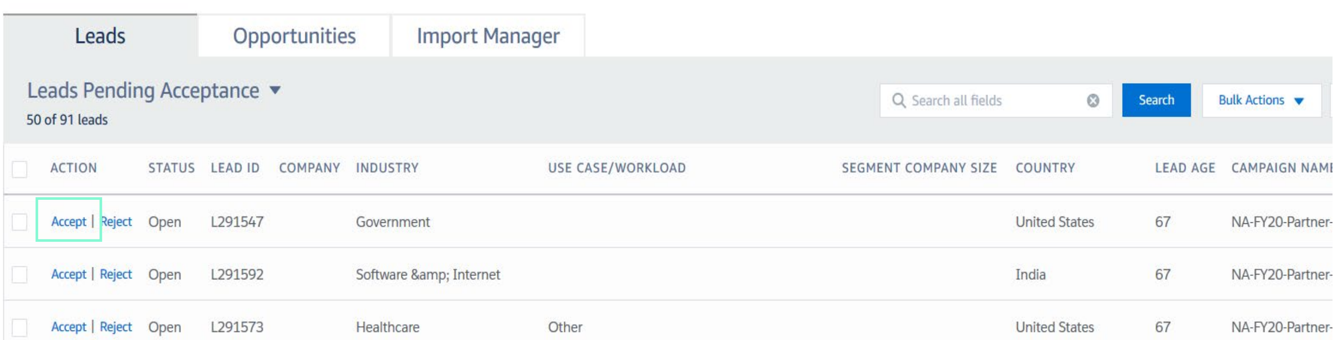
AWS Partners have the option to either 'Accept' or 'Reject' incoming lead engagements. Any new lead that is surfaced to you will need to be 'Accepted' before the entire lead detail, including contact information, is made visible. Rejected leads will automatically be removed from the Leads tab.

To accept a lead, follow the steps below:

1. From the Leads Tab, click ’All Customer Engagements’ and navigate to 'Leads Pending Acceptance’.



2. Hover over and select 'Accept' next to any desired lead.



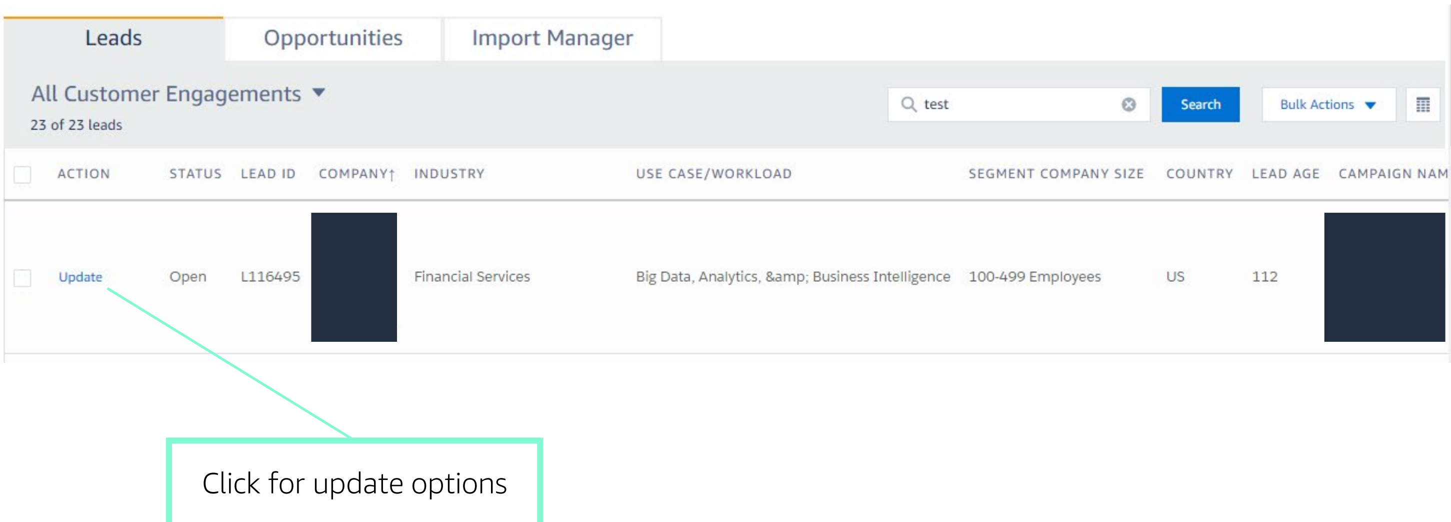
3. Once accepted, you will see an option to 'Update' appears.

Lead Updates

Accepted leads can be edited to reflect new updates regarding the progression of the lead engagement.

To update leads:

1. Navigate to any lead and select 'update' in column 'Action' .



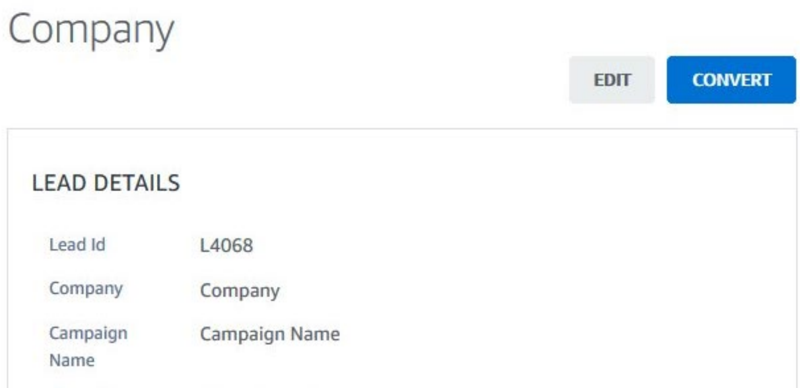
2. Select 'Edit'.
3. Make relevant updates and select 'Save'.

Convert Leads

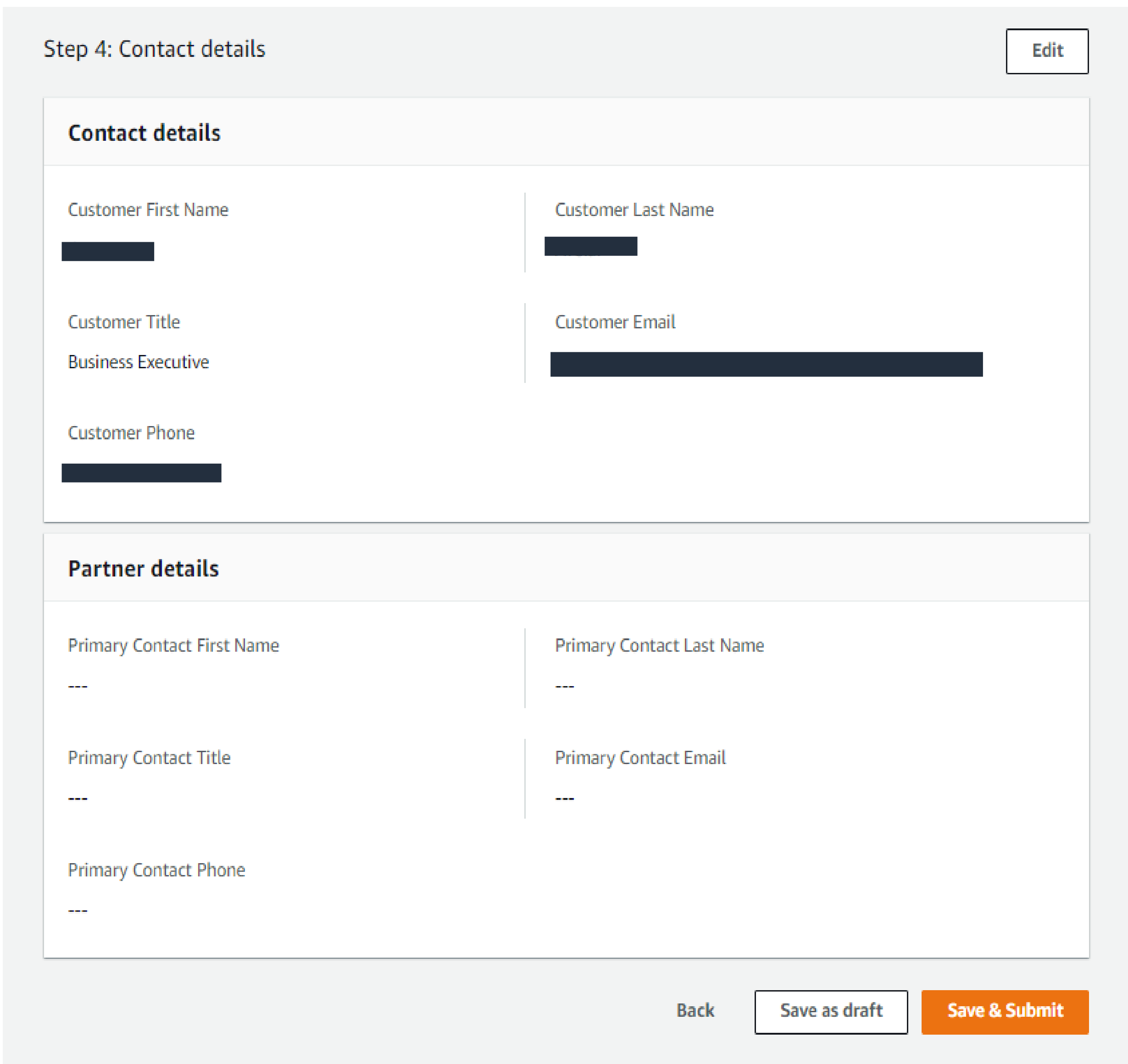
Lead engagements nurtured to a sales Qualified stage can be converted to opportunities to receive AWS validation and support. See section in glossary for **AWS Sales Stages** for further information.

To convert leads:

1. Navigate to desired lead and select 'Update' in column 'Action'.
2. Select 'Convert'.

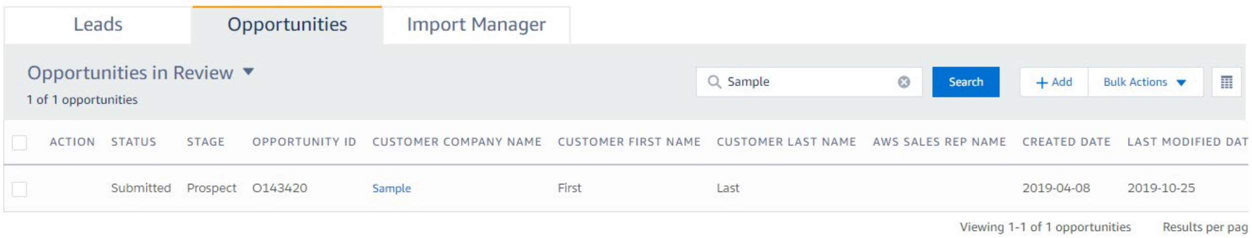


3. Complete applicable fields in the opportunity submission form and select 'Save & Submit'.



4. Once submitted click 'Back to Opportunities Dashboard’.

5. The new opportunity can be found in the 'Opportunities Tab' and will display with 'Status' = Submitted.



Export Leads

The Export Leads feature allows you to export all of your existing lead information into an easy to read CSV file. To view all available lead information, ensure all leads are accepted (link to accept leads section).

Lead Transfer

Partner Users have the capability to transfer ownership of leads within their ACE Pipeline Manager to another active user within their partner organization (Alliance Lead, Alliance Team, ACE Manager, ACE User). To transfer a **single lead**, from the Leads tab in the ACE Pipeline Manager:

1. Select the single lead you want to transfer.

2. Click on ‘Bulk Actions’ > ‘Transfer Leads’

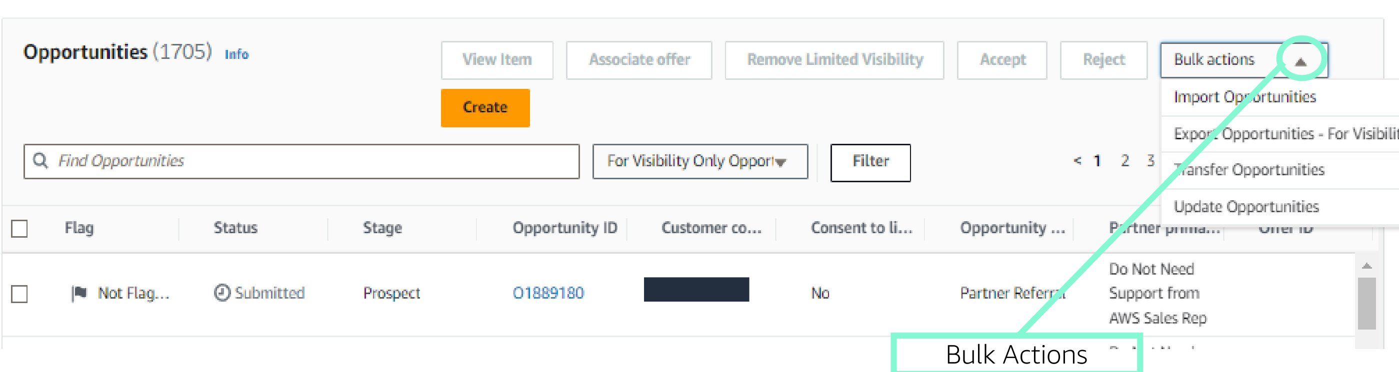
3. Type in the name of the new Lead owner to search and click ‘Save’.

Note: Leads can only be transferred to users with permissions to the ACE Pipeline Manager. See section on Permissions for further information.

To transfer **multiple leads** in bulk, please refer to the Transfer Lead and Opportunity Ownership section.

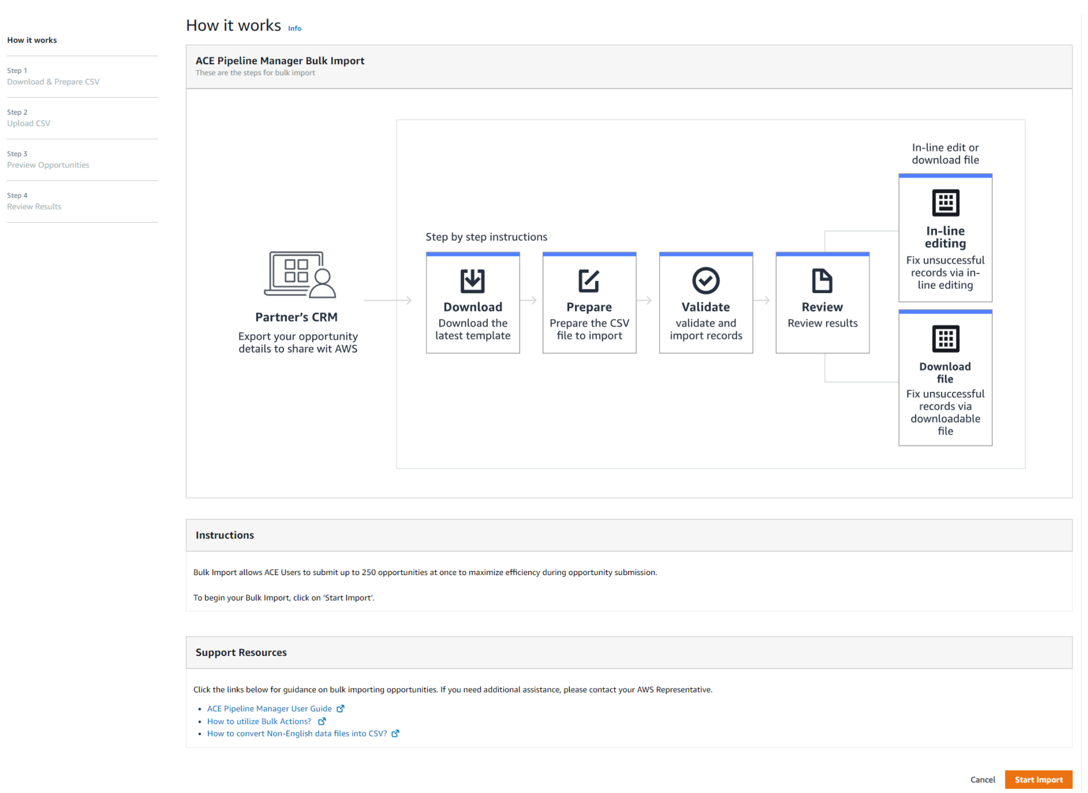
Bulk Actions

Bulk actions can help maximize efficiency when utilizing the ACE Pipeline Manager. This includes the ability to submit, export, update, and transfer multiple opportunities at once.

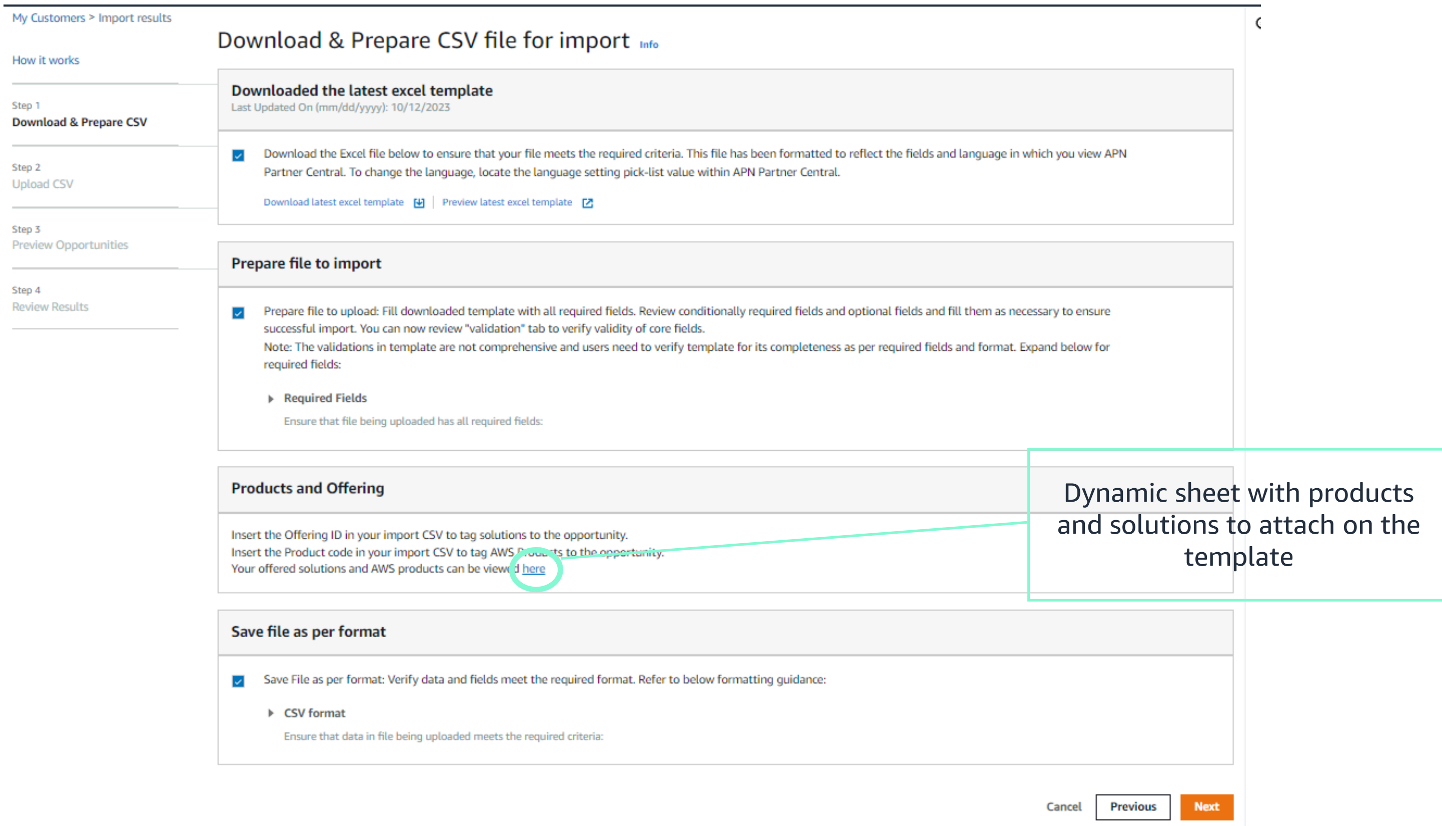


The Bulk import function allows a user to submit up to 250 opportunities in bulk. It is best practice to ensure information is accurate and complete prior to import, as edits cannot be made until the opportunities have been approved or validated by ACE. For a full guide on how to use the Bulk functionality refer to ACE Bulk Functionality User Guide.

1. To upload opportunities in bulk, click on the drop-down for 'Bulk Actions' and select 'Import Opportunities'. AWS Partners will be prompted with an overview of all the key steps involved.



2. Click on 'Start Import'. Users will need to complete and check off each section within 'Download and Prepare CSV file for import' steps prior to being able to upload a file:

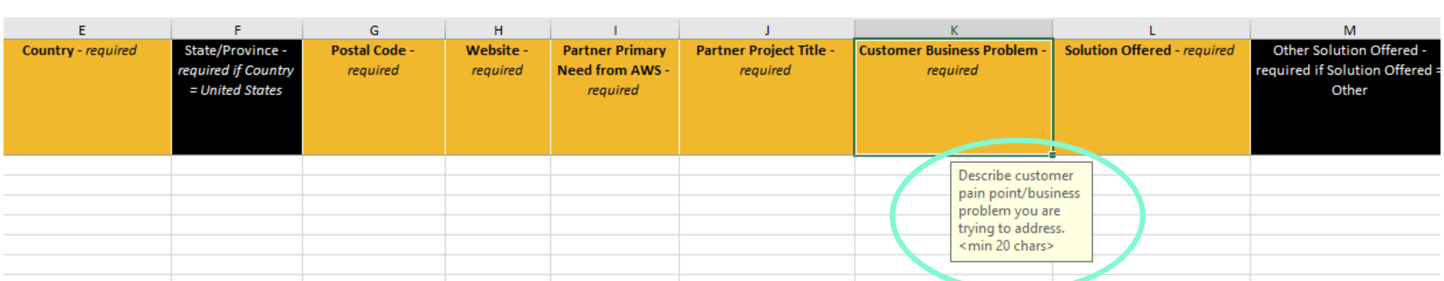


a) **Always download the latest Excel template**. The date in which the template was last updated will be displayed for user transparency. Note: it is the user's responsibility to ensure the latest template version is being used for upload.

b) **New changes:** Check the new section "Products and Solutions" for guidance on how to attach products and solutions on opportunities. Download the dynamic sheet to check the APN Product Codes and Solutions IDs to add on the bulk excel template.

c) **Prepare the Excel file to import**. Fill in all the information in the required fields highlighted in **yellow**. There are guided boxes that appear by clicking on the cell. They support you through the process in order to insert the correct information. Some of the cells have a drop-down function where you can review the required fields and pick from that list.

d) **Additional columns** become required if you select certain options. These additional columns are **highlighted** in black in the excel file and listed in the table below.



Save the file as **CSV file** prior to upload. Reference the text under 'CSV format' to review the formatting criteria.

Save file as per format

Save File as per format: Verify data and fields meet the required format. Refer to below formatting guidance:

CSV format

Ensure that data in file being uploaded meets the required criteria:

1. Do not submit empty rows
2. Each row separates a new opportunity
3. Fill in each cell from left to right for each line
4. Ensure data is accurately formatted (i.e. e-mail in email@domain.com format)
5. File must be saved as a CSV (*.csv) file
6. You can import up to 250 records at a time

Additional formatting criteria

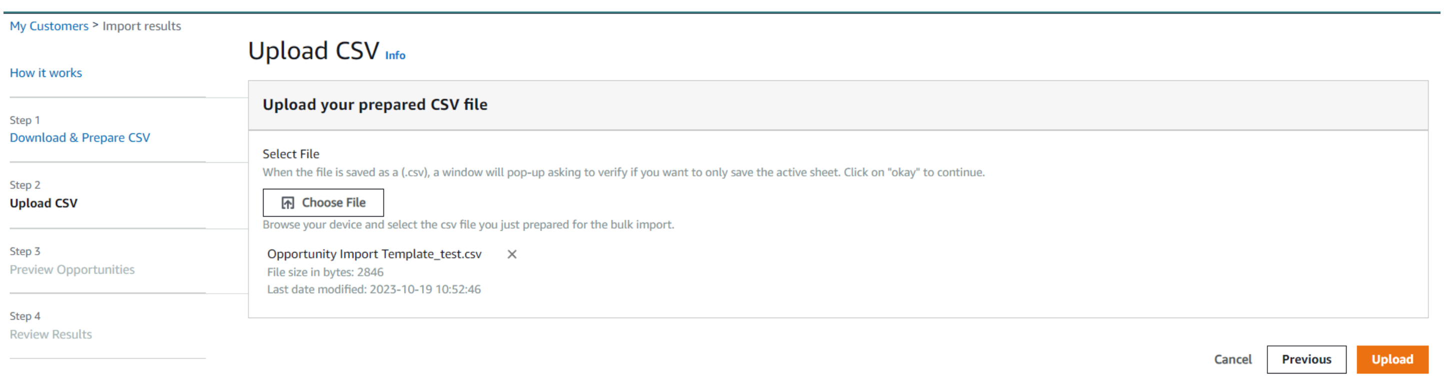
1. (i.e. e-mail in email@domain.com format)
2. File must be saved as a CSV (*.csv) file
3. If 'Account ID' is referenced, ensure it is a whole number (no decimal) with 12 digits
4. Date must be in mm/dd/yyyy
5. Multi-select pick-list values should be separated by a semicolon, for example: 'Managed Services;Other'

Importing Non-English Data

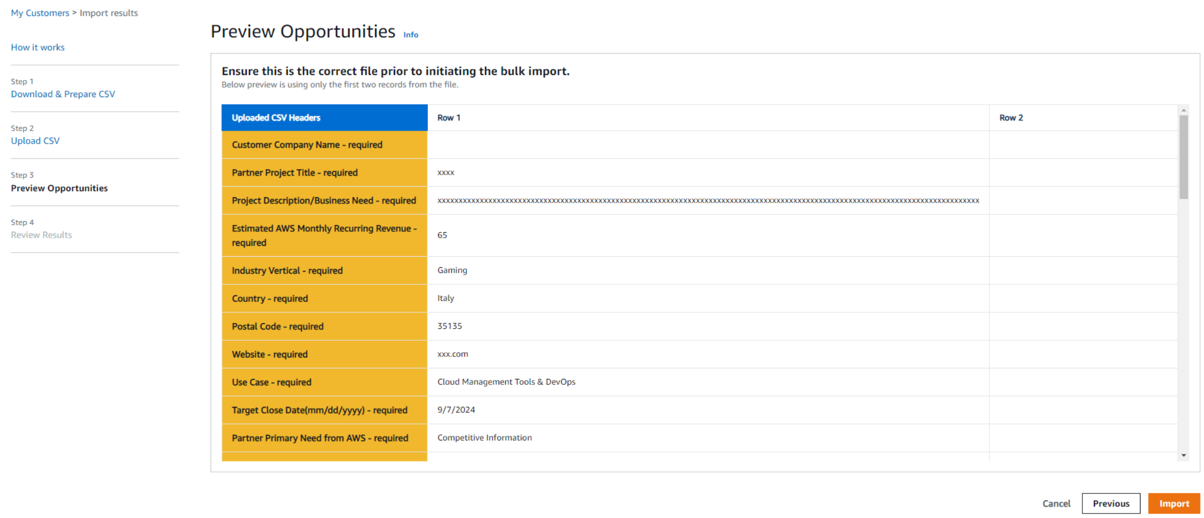
1. Open the *.xlsx file from Excel.
2. Click Menu | Save As (Other Formats).
3. Save As "Unicode Text (*.txt)" for "Save as type".
4. Open the Unicode text file using Microsoft Notepad
5. Replace all tabs with a comma (,) in your document.
6. Save As the file and change file name extension from "*.txt" to "*.csv".
7. Change the "Encoding" to UTF-8 and click save.
8. Open the file back in Excel to ensure data is readable.

3. Click on next.

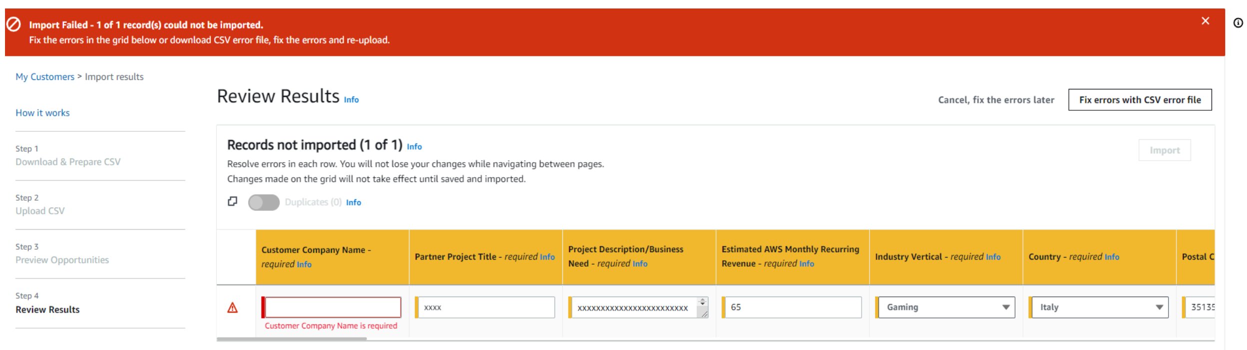
4. Once the Excel template is filled in, click on 'Select File' to select the (*.csv) you just saved, and click on 'Upload'.



5. Preview a sample of the information you are importing and ensure it is the intended file.



6. If you receive an error message, resolve any missing fields it may have surfaced. Refer to the tables above to check the required fields and the Errors in the bulk upload section further down in this document.



7. If you don't receive an error message. Click on 'Import' to continue.

8. Wait until upload is completed.

9. A final confirmation of successful upload will pop up. If you receive an error message instead, please review the section below on 'Errors in the bulk upload'.

10. Click 'Done, close bulk import' to return to the ACE Pipeline Manager.

Required Fields – Header in **YELLOW**

Field Name (REQUIRED)	**Formatting Requirements**
Customer Company Name	80 characters maximum

Industry Vertical *(pick-list value)*	Required Conditional Field:
	• Select a 'Industry Vertical' from the pick list. If copying data from another file, paste as "Text Only".
	• Needs to map to valid selection. See 'Values' sheet containing mapping
	• Industry 'Other' (**required** if Industry Vertical = Other) – (**Column C**)
	  ○ Required field when Industry Vertical selected is 'Other', 255 characters maximum
	• Government and Education selections make the following **mandatory**:
	  ○ Does opportunity belong to NatSec? – (**Column D**)

Country *(pick-list value)*	Required Conditional Fields: • Needs to map to valid selection. See 'Values' sheet containing mapping • If copying data from another file, paste as "Text Only" • State/Province (pick-list value) – (**Column F**) ○ When country equals 'United States', 'State/Province' in Column F becomes a **required** field
Postal Code	• Field is specific to the end customer's billing postal code • 20 characters maximum • If the postal code starts with zero, reformat the cell to "Text" • Attention to the formatting according to each country. Refer to the values tab and follow the postal code format of the country selected. If your country does not have a postal code leave it blank
Customer Website	• It needs to be a valid domain • No customer social media pages allowed • 255 characters maximum • If the domain ends in .co add a "/" at the end (e.g.: www.domain.co/)
Partner Primary Need From AWS	Required Conditional Field: • Needs to map to valid selection. See 'Values' sheet contains mapping • If you select 'Co-Sell' then Sales Activities becomes required (**Column W**)
Partner Project Title	60 characters maximum
Customer Business Problem	• 20 character minimum • Describe the customer's pain point or business problem you are trying to address
Solution Offered	• Here you can enter the solution ID for the solution you are considering to address customer's business problem. • If you do not have an solution ID, please enter "Other". ○ When you enter 'Other', then Other Solution Offered becomes required (**Column M**). Describe the solution offered in a max of 255 characters.

Use Case *(pick-list value)*	• Needs to map to valid Use Case. 'Values' sheet contains mapping • If copying data from another file, paste as "Text Only".
Estimated AWS Monthly Recurring Revenue	Numeric digits only, no special formatting. Remember to count revenues in dollars and use US decimal notation (0000.00)
Target Close Date	• Future date must be in mm/dd/yyyy format. Update column formatting prior to and after saving the CSV file. • When formatting the column do not use Date formatting with asterisk. It will respond to change based on a user's location and operating system. Please download a new template, transfer data only, and format the Target launch date column using the steps below.
Opportunity Type	• Select from the list of valid values only to specify if the project is a net new business, renewal or expansion. • If the opportunity is a renewal or expansion, you can add the Parent Opportunity ID on Column Y
Delivery Model *(pick-list value)*	• Needs to map to valid selection. See 'Values' sheet contains mapping • If copying data from another file, past as "Text Only".

Is Opportunity from Marketing Activity?
(required)
	• Select 'Yes' or 'No'.
	• If you select 'Yes', the following field becomes **mandatory**:
	  ○ Was Marketing Development Funds Used? (required if Is Opportunity from Marketing Activity? = Yes) – **(Column U)**
	• If you select 'Yes', the following field becomes *optional*:
	  ○ AWS Marketing Campaign (Column AK)
	  ○ Marketing Activity Channel (Column AL)
	  ○ Marketing Activity Use-Case (Column AM)
	• Needs to map to valid selection. See 'Values' sheet contains mapping

Sales Activities	Is required if Partner Primary Need from AWS (Column I) is equal to "Co-Sell". Here describes the sales activities that have been done with the customers for the project.
Competitive Tracking (Column AI)	• If Competitive Tracking is 'Other', then Other Competitors **(Column AJ)** is required.

Please note that the "Secondary Required Fields" are highlighted in BLACK and they become required:

1. If Industry Vertical = 'Other', the vertical will need to be specified in Column C
2. If Industry Vertical = 'Government' or 'Education', the additional field is requested: 'Does opportunity belong to NatSec?' (Column D)
3. If selected country is 'United States', then 'State/Province' becomes a required field (Column F)
4. If Solution Offered = 'Other', then 'Other Solution Offered' becomes required (Column M)
5. If you select 'Yes' for the 'Is Opportunity from Marketing Activity' field, the 'Was Marketing Development Funds Used?' becomes required (Column U). Additional columns becomes optional: AWS Marketing Campaign, Marketing Activity Channel, Marketing Activity Use-Case.

6. If Partner Primary Need From AWS = Co-Sell, then specify the Sales Activities in Column W.
7. If 'Competitive Tracking' is set to 'Other', then it will need to be specified in Column AJ.
8. The Excel template contains a 'Values' tab you can use to fill in the additional columns.

Optional Fields

Partner should check the formatting of the optional fields to avoid any error.

Field Name	**Formatting Requirements**
AWS Products (Column X)	• Add the AWS Product Code that you can find on the excel file on Step 1 for Bulk Import actions • In case of multiple products: separate each Product ID by a ";"
Customer Phone	Add numbers only
Customer Email	Must be a valid, single email address
AWS Account ID	Must be a 12-digit number. If the ID starts with zero, reformat the cell to "Text"
Additional Comments	255 characters maximum
State/Province *(pick-list value)*	Required Conditional Field: • State is a required field when country equals 'United States' ○ State/Province (pick-list value) – (**Column F**) • If copying data from another file, past as "Text Only".
Street Address and City	255 characters maximum (each)
Competitive Tracking *(pick-list value)*	Required Conditional Fields: • Needs to map to valid selection. See 'Values' sheet contains mapping • Other Competitors (Column AI) ○ If selected Competitive Tracking is 'Other', **Column AJ** becomes **required** (255 characters max)
Marketing Development Funded?	Pick-list value • Needs to map to valid selection. See 'Values' sheet contains mapping
Primary Sales Contact, First Name, Last Name and Title	• The contact referenced in this field will be included on opportunity-related email notifications
Primary Contact Phone	Add numbers only
Primary Contact Email	Must be a valid, single email address
Partner CRM Unique Identifier	• 'Partner CRM Unique Identifier' field should be unique per opportunity. • Ensure value is different per opportunity or clear this field so user can save and submit the record.

Export Opportunities

The Bulk Export functionality allows a user to export up to 1500 opportunities into a CSV file. AWS Opportunity referrals that have not been accepted will not appear in the export. To export: click on the Bulk Actions drop-down and select 'Export Opportunities' to automatically generate a file of your opportunities.

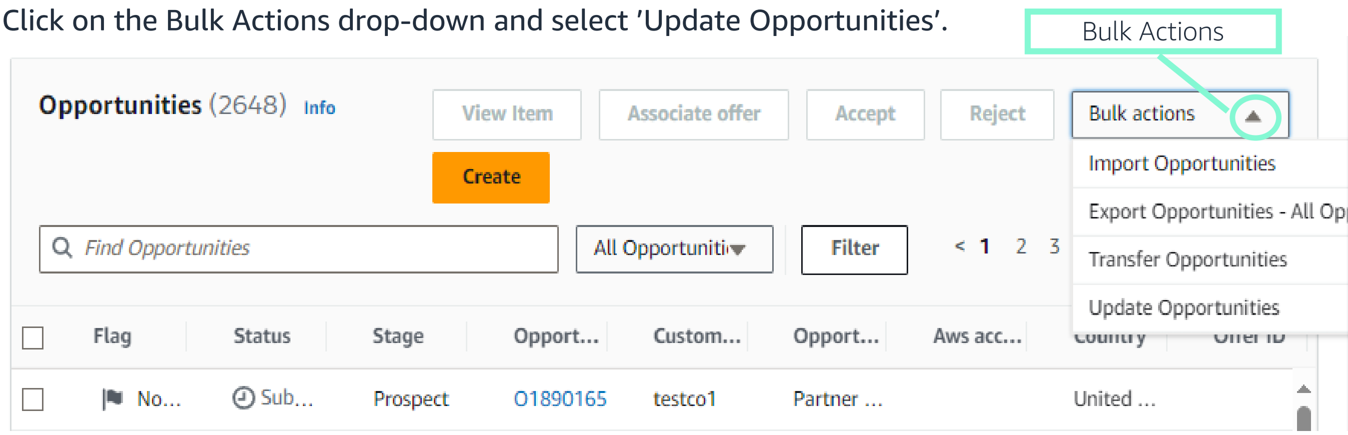
Note: you will export all the opportunities in the current filter view you have selected.

Update Opportunities

The bulk update functionality provides the ability to export validated opportunities to make changes to in bulk.

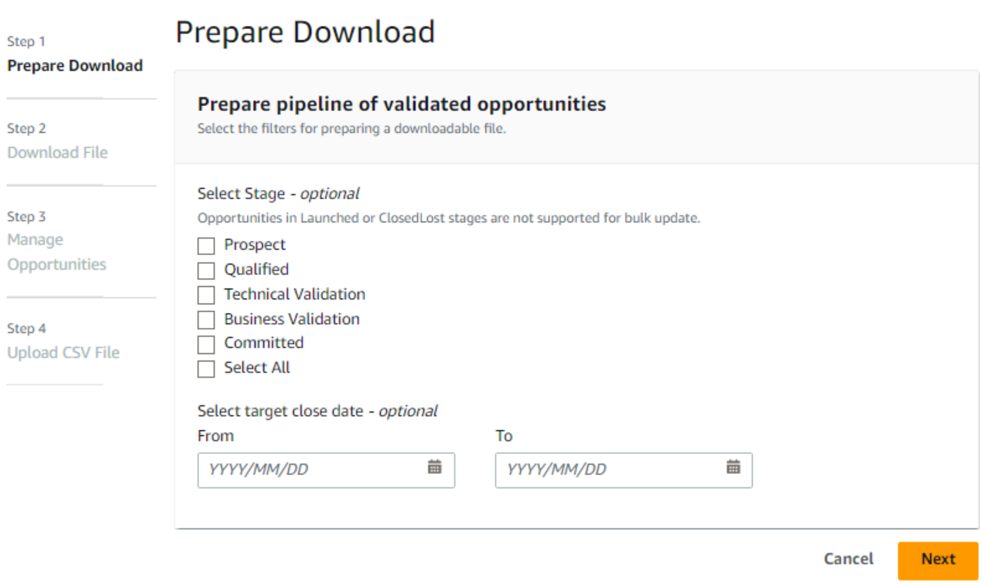
This feature is meant to be a scalable way to provide internal AWS teams visibility into the sales activities surrounding each engagement.

1. Click on the Bulk Actions drop-down and select 'Update Opportunities'.

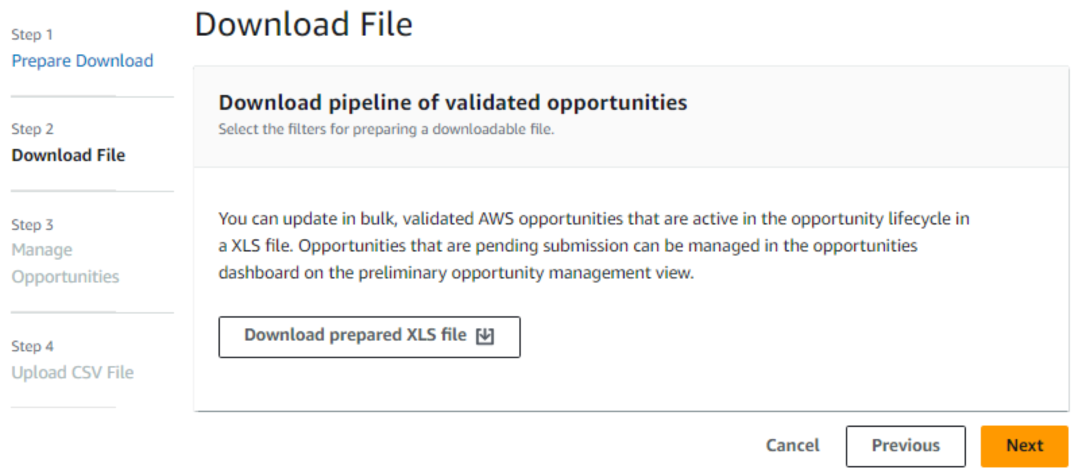


2. Prepare the download of the opportunities you want to update. Use available filters if you want to select a specific set of opportunities

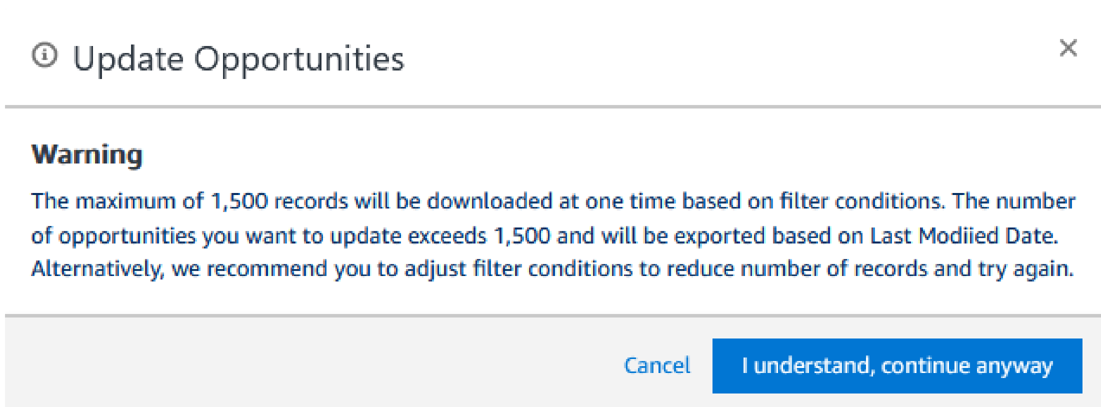
3. Click on 'Next'



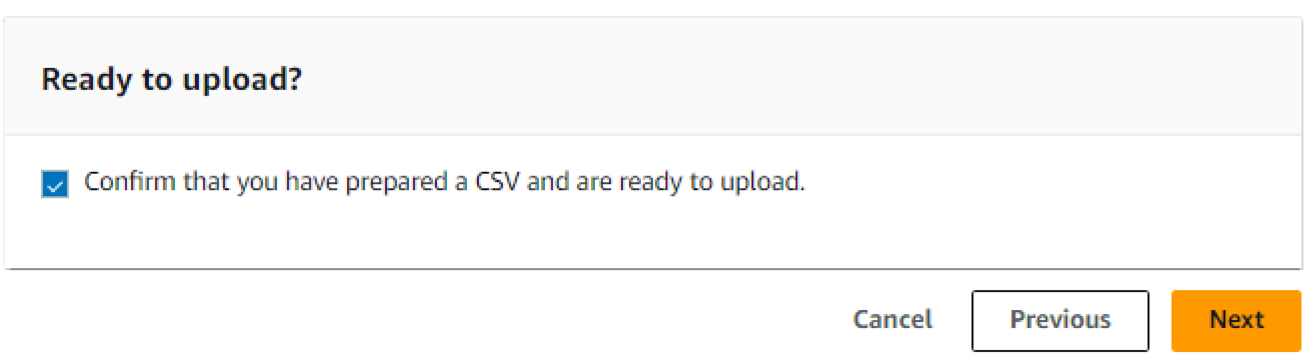
3. Select option to 'Download Prepared XLS file' to generate a download of AWS opportunities.



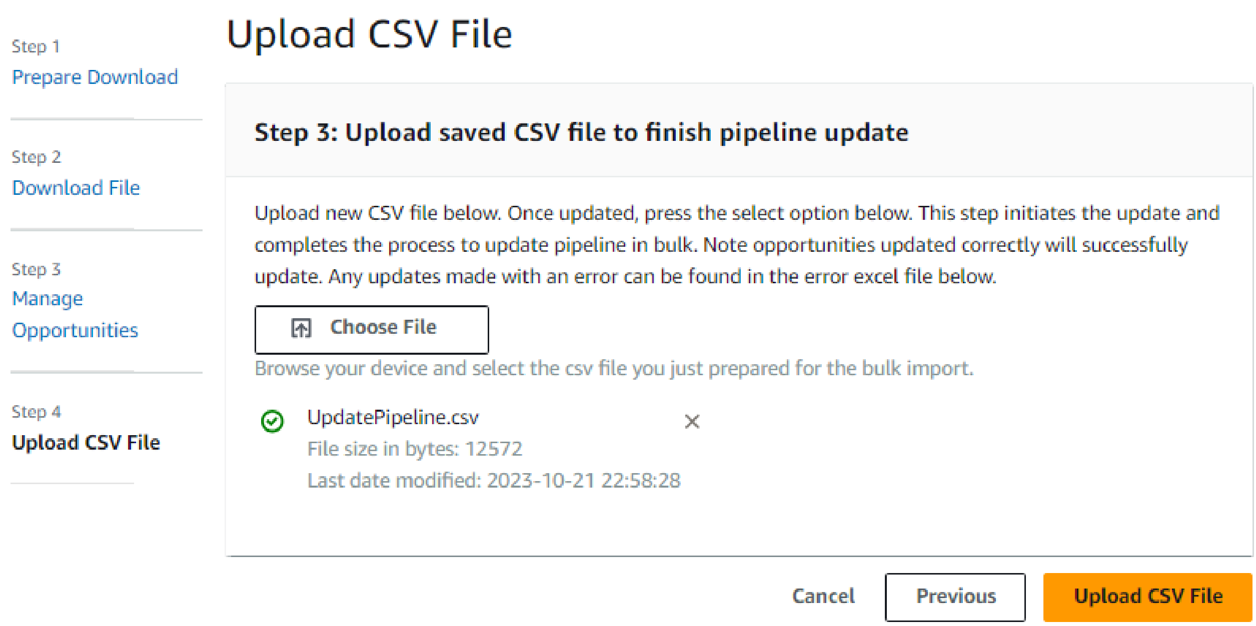
4. **Acknowledge that there is a maximum limit of 1500 opportunities that can be downloaded each time.**



5. Open the Excel and make any necessary changes and save the file as a Comma Delimited (*.csv).
6. Click on Upload File, select the (*.csv) file that was just saved, and click on 'Update'. A screen will pop-up confirming the process status.
7. Confirm that you have prepared the CSV and are ready to upload. Then click 'Next'



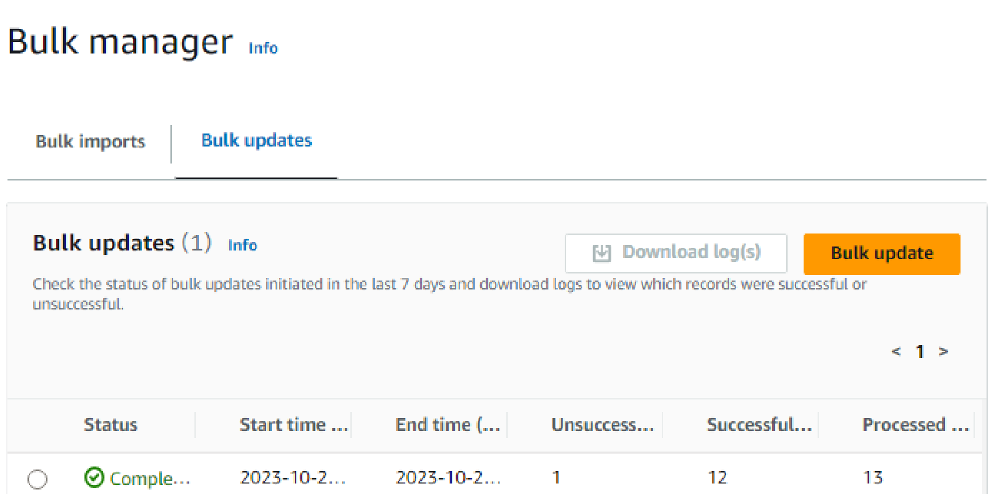
8. Select the file you have prepared and upload it, the click ‘Upload CSV File’.



9. You will be redirected to the ACE Pipeline Manager.

10. Once the bulk update is completed you will receive a notification

Note: if you click on ‘Go to Bulk updates’ you will be able to see a history of the bulk updates and get more detailed information.



Transfer Lead and Opportunity Ownership

Partners Users now have 2 options to transfer leads and opportunities (single or many):

Option 1: Transfer Opportunities from View

Option 2: Select from Pipeline Manager list to Transfer

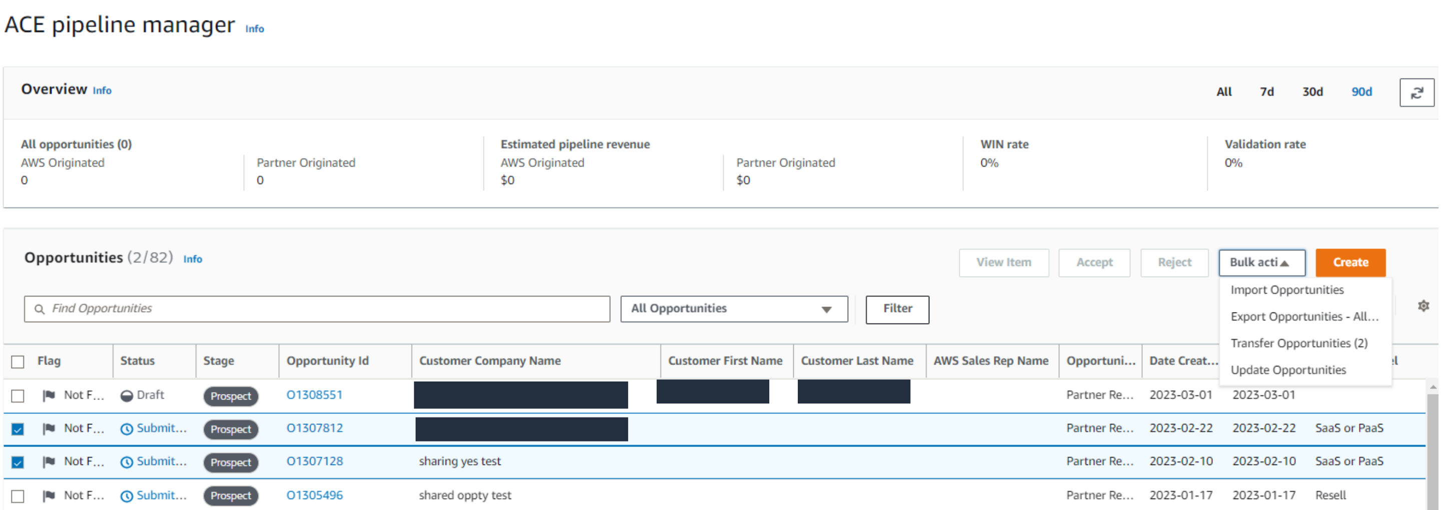
Transfer Opportunities from View

Partner Users can transfer all opportunities from a view to another Partner User within the same organization. Alliance Leads will continue to have access to viewing all opportunities even after the opportunities have been transferred.

Note: A notification confirming the transfer is sent to both the Partner User transferring and receiving the list view.

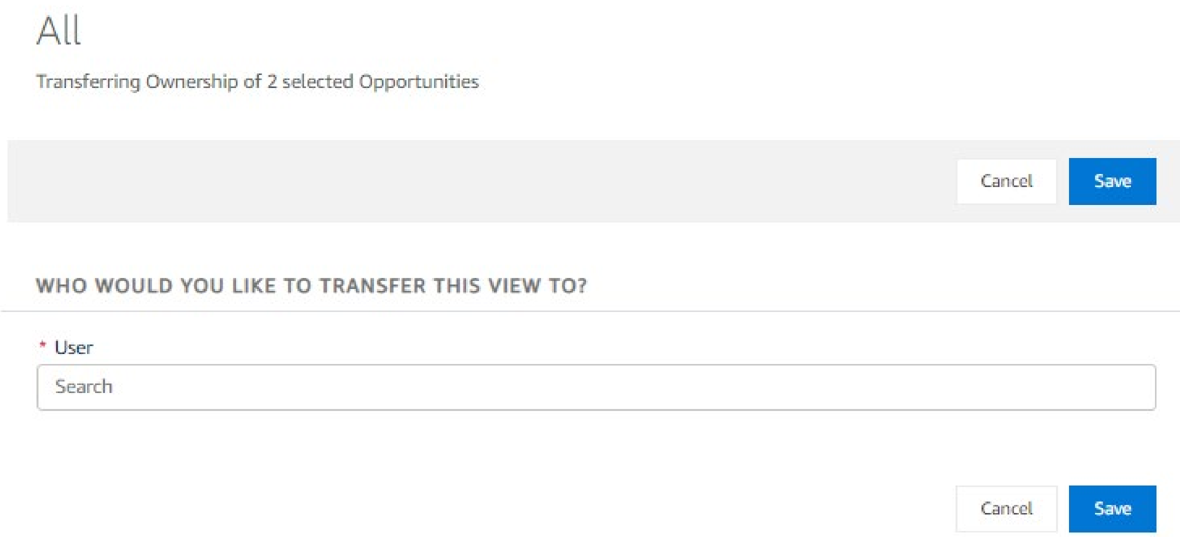
Please refer to the List Views and Creating Custom List Views sections for guidance.

1. Start on the tab with the view you want to transfer (e.g. Click on the ‘Opportunities’ tab if you want to transfer a custom list view for Opportunities and click on the ‘Leads’ tab if you want to transfer a custom list view for Leads).
2. If you are already in your custom view, click on the down arrow to reveal options to Edit, Transfer, or Delete. If you are not in your custom view, click on the downward arrow and scroll to the desired view. Click on the vertical dots to the right of the desired view to display further options.
3. Click on either option to Transfer the view.



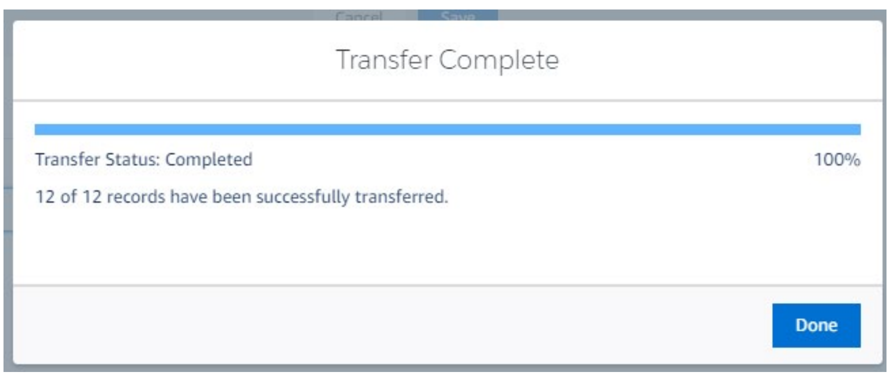
4. Type in the first or last name to locate the Partner User intended to receive the custom list view. Searching only by pasting in the email may not pull up the user.

Note: You can only transfer leads and opportunities to individuals who have been granted ACE Pipeline Manager User access.

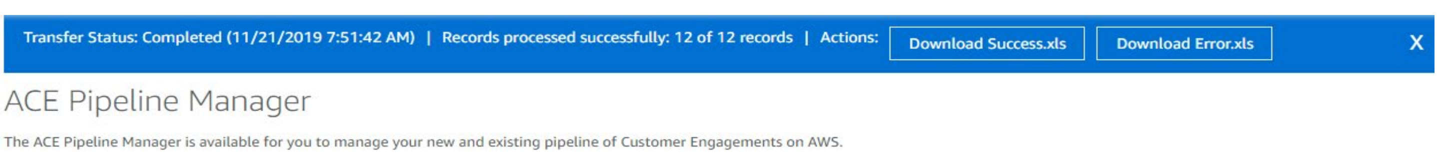


5. Click on the Partner User contact to confirm and click ‘Save’.

6. You will receive a pop-up confirming that the transfer is complete. Click ‘Done’.



7. You will be brought back to the main ACE Pipeline Manager view where you can download a CSV of successful transfer and unsuccessful transfers. Click on the ‘X’ to remove the pop-up.



Select from Pipeline Manager list to Transfer

Users can select up to 100 leads or opportunities within their ACE Pipeline Manager and transfer them to another active user within their partner organization (Alliance Lead, Alliance Team, ACE Manager, ACE User). This will allow users to transfer leads or opportunities without creating a 'Custom View'. Alliance Leads will continue to have access to viewing all opportunities even after a view has been transferred.

Note: A notification confirming the transfer is sent to both the Partner User transferring and receiving the opportunities or leads.

Only **opportunities** with the following attributes can be transferred:

- **Stage:** Prospect, Qualified, Technical Validation, Business Validation, Committed (Not Launched or Closed/Lost)
- **Status:**
    - Partner Originated Opportunities: Draft, Action Required, Approved
    - AWS Referred Opportunities: Accept to View, Approved

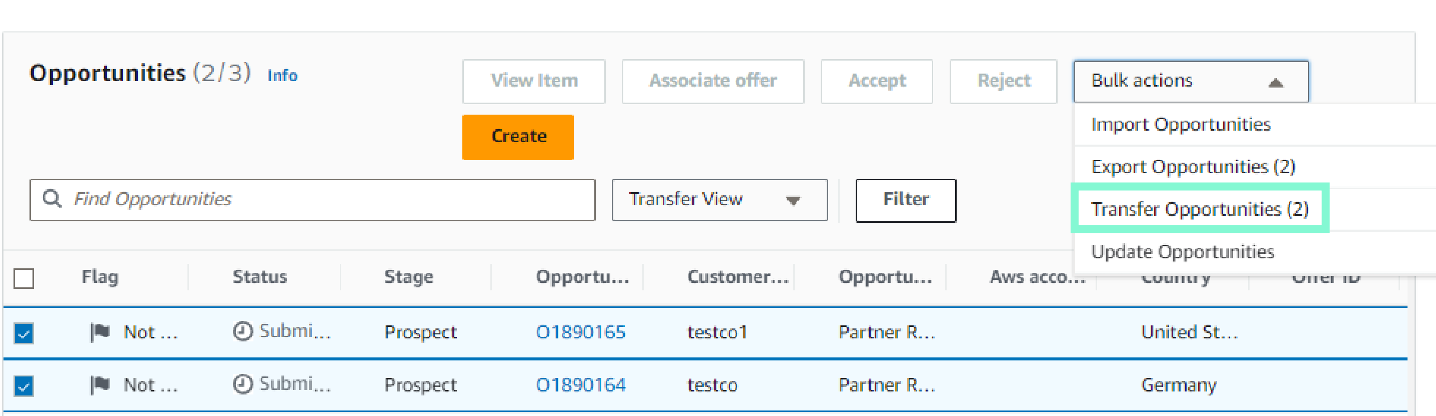
Only **leads** with the following attributes can be transferred:

- **Action:** Update

Note: The screenshots below refer to the Opportunities Ownership bulk transfer but the same steps and process apply to Lead Ownership Bulk Transfer.

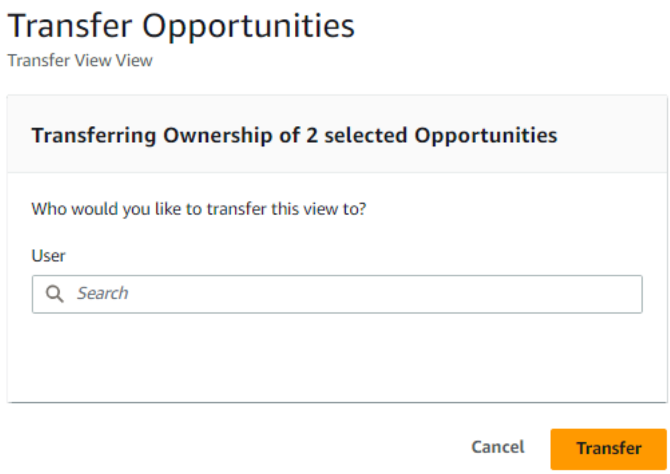
Steps to transfer leads or opportunities:

1. Select 'Bulk Transfer' from the Bulk Actions dropdown list.



2. The number of records being transferred will be displayed.

   IMPORTANT: If no opportunity has been selected/'toggled', all the opportunities in the list view will be transferred. **Please ensure that the number matches the number of opportunities selected or 'toggled' so that you do not unintentionally transfer a large number of opportunities that were not intended.**

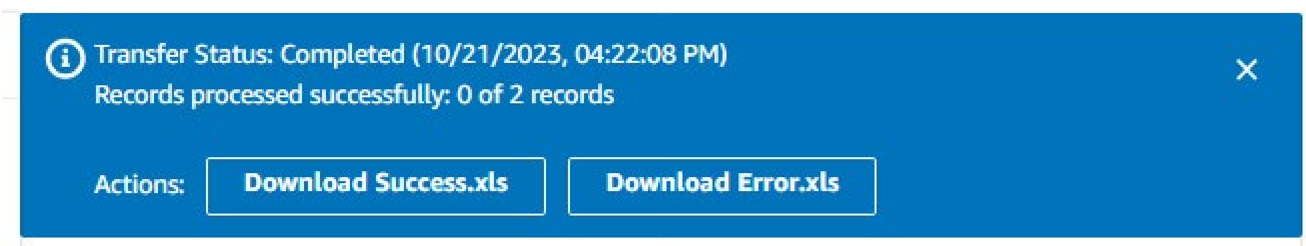


3. Search for the user you want to transfer the opportunities to and click 'Transfer'.

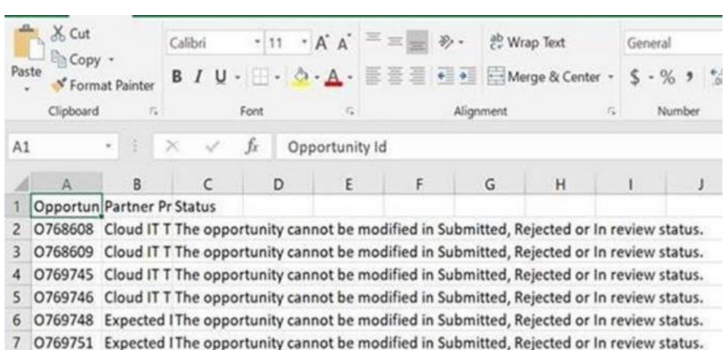
   The Partner will need to type in the name of an active user within their partner organization in which they would like to transfer the selected opportunities. User can be in any of the following roles: Alliance Lead, Alliance Team, ACE Manager, ACE User.

4. You will be redirected to the ACE Pipeline Manager and receive a notification with the result of the transfer.

   Any opportunities that did not transfer will remain in the original owner's name.



5. Click on any of the buttons to download the opportunity transfer logs



6. The error log will provide the opportunity ID and reason why the transfer failed.

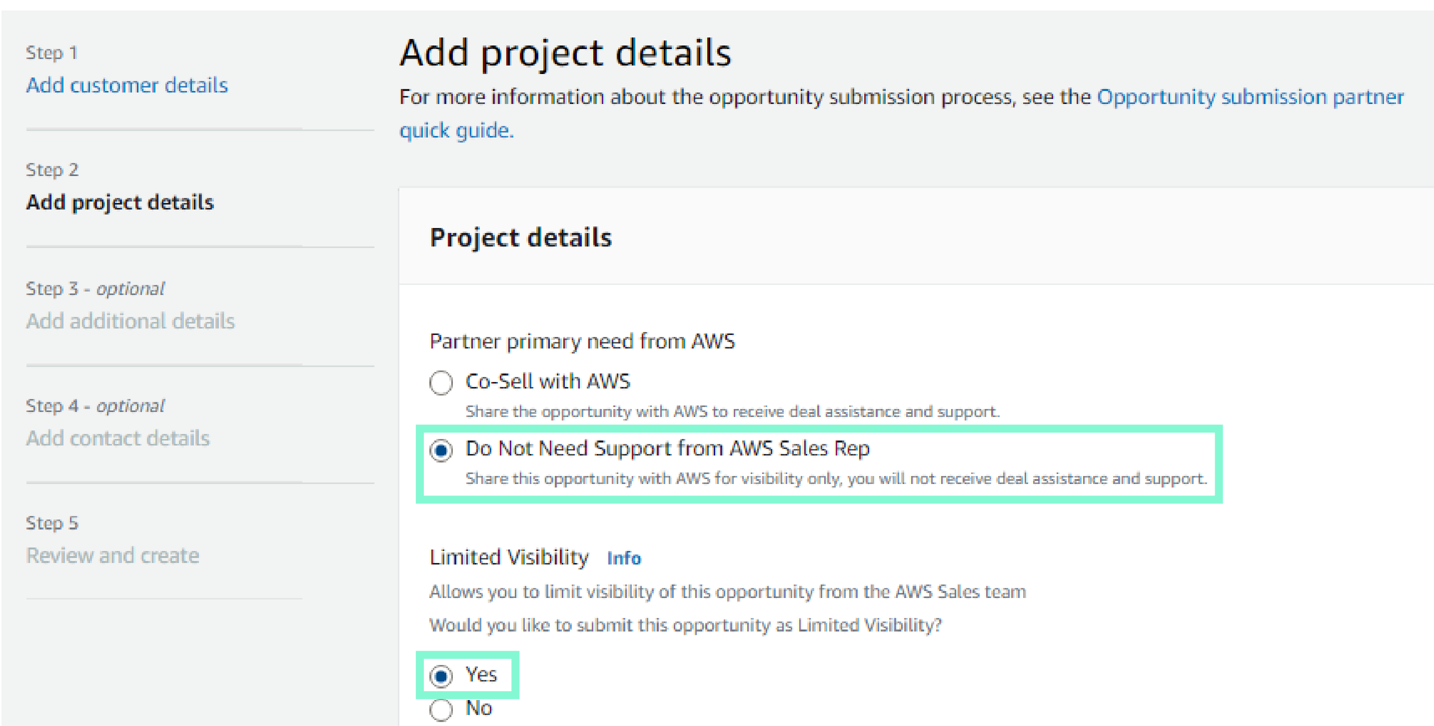
GSI Partners

Limited Visibility Opportunities

GSI Partners can choose to submit opportunities with ‘Limited Visibility’ to AWS Sales teams. When ‘Limited Visibility’ is selected, the opportunity will not be shared with AWS Sales, and your GSI PDM will be assigned as the opportunity owner in APN Salesforce after validation. ‘Limited Visibility’ opportunities will follow the same validation process and are held to the same validation criteria as standard opportunity submissions.

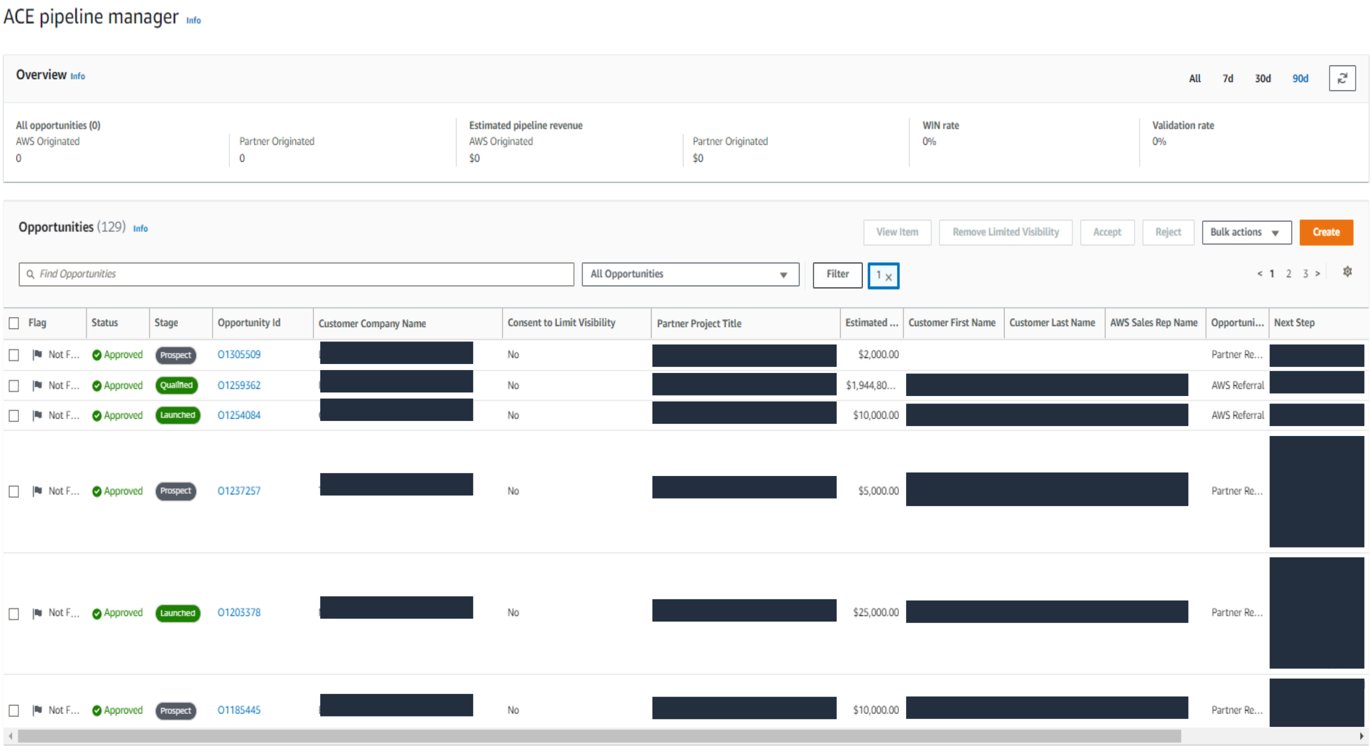
To submit an opportunity with Limited Visibility, follow the steps below (***note: only available to GSI Partners***):

1. Fill in all core fields in the opportunity customer details either on single submission or bulk import.
2. For ‘Partner primary need from AWS’ select ‘Do Not Need Support from AWS Sales Rep’
3. You will see a new ‘Limited Visibility’ field which is mandatory to complete.
4. Click on ‘Yes’ toggle to indicate opportunity is ‘Limited Visibility’: “By selecting ‘Yes’ this opportunity will not be visible to AWS sales.”
5. Once all core fields are completed, click ‘Save and Submit’. Once submitted, Opportunity Status will reflect ‘Submitted’ and is not editable until reviewed by the ACE Validation Team.

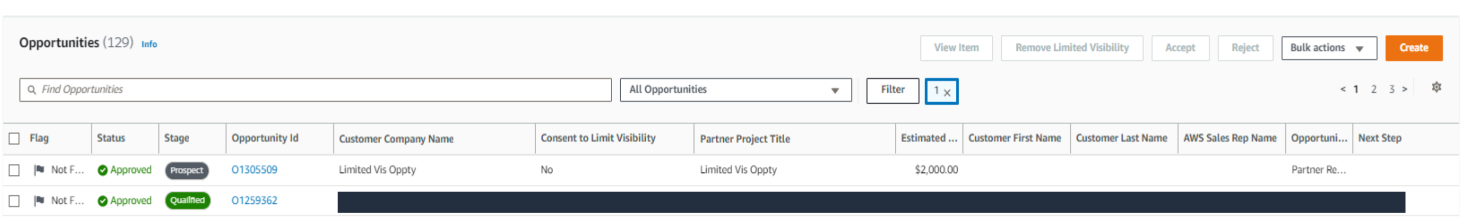


Limited Visibility Opportunity Review Process

Once a ‘Limited Visibility’ opportunity has been submitted, it will appear much like a opportunity, with the addition of the ‘Limited Visibility’ indicator in the ACE Pipeline Manager dashboard:



After ACE approves a Limited Visibility opportunity, the Status will be updated to ‘Approved’ in Partner Central:



The ‘Contacts’ tab of the opportunity will only display the GSI PDM opportunity owner or the WWPS GSI PDM. It will not contain the AWS Seller or PSM/ISM contact information:

Contacts

AWS Sales Rep	
AWS Sales Rep Name	[redacted]
AWS Sales Rep Email	[redacted]
Partner Sales Contact	
Partner Sales Rep Name	
Primary Contact Email	
Primary Contact Phone	
AWS Account Manager	
AWS Account Owner Name	[redacted]
AWS Account Owner Email	[redacted]
Partner Development Manager	
Partner Developer Manager	[redacted]
Partner Developer Manager Email	[redacted]
WWPS Partner Development Manager	
WWPS PDM	
WWPS PDM Email	
AWS Partner Success Manager (PSM)	
AWS Partner Success Manager Name	[redacted]
AWS Partner Success Manager Email	[redacted]
AWS ISV Success Manager (ISM)	
AWS ISV Success Manager (ISM) Name	[redacted]
AWS ISV Success Manager (ISM) Email	[redacted]

A notification is sent to you confirming that the ‘Limited Visibility’ opportunity has been validated, with your GSI PDM in copy. No AWS Sales contacts will be included in the email.

If the opportunity is not Validated, it follows the same process as a standard opportunity disqualification. ‘Status’ will show ‘Rejected’, and a ‘Not approved’ notification will be sent to you with your GSI PDM in copy. No edits can be made to the opportunity once it is in ‘Rejected’ status.

If additional information is requested by the ACE Validation Team, the opportunity ‘Status’ will be updated to ‘In Review’. An email notification will be sent to you and your GSI PDM. You may reply to the email with your updates, or use the ‘Update’ option under the ‘Action’ column in ACE Pipeline Manager (*preferred*):

While the opportunity is ‘In Review’, you may update the ‘Limited Visibility’ indicator in the Opportunity Details, or a Validator can update it at your request. You may also edit the following fields: description, estimated AWS MRR, Close Date, or can send your edits to ACE. Once updates have been submitted, Opportunity ‘Status’ will reflect ‘Submitted’ and the opportunity will not be editable until reviewed by the ACE Validation Team.

Opportunity Updates to Limited Visibility Opportunities

After validation, you are expected to update the opportunity bi-weekly, just like standard opportunities. ‘Limited Visibility’ can be removed at any time after validation, and prior to Stage ‘Launched’ or ‘Closed/Lost’.

Note: If you need sales support or funding on an opportunity, ‘Limited Visibility’ must be turned off.

If ‘Limited Visibility’ is no longer relevant, you can connect with your GSI PDM to remove it on an opportunity, or deselect ‘Limited Visibility’ in ACE Pipeline Manager. To deselect Limited Visibility from Pipeline Manager, follow the steps below:

1. Locate the opportunity you would like to remove Limited Visibility on and click into the opportunity details.
2. From the ‘Edit’ screen, scroll down to the ‘Limited Visibility’ field and select ‘No’. A pop up will appear to let you know that you are removing ‘Limited Visibility’, and the opportunity will be shared with AWS sales by deselecting.
3. The Opportunity will be converted and will be assigned to the end customer sales representative. A Notification will be sent to Partner, AWS sales, PDM upon conversion introducing Partner to the AWS sales representative/s. AWS sales will not see ‘Limited Visibility’ indicator

Glossary

Notifications

Notifications are sent via email about key activities on opportunities and are usually sent from an alias such as APN-No-Reply. This section provides you with best practices to manage the email notifications you may receive.

Setting up email inbox rules and creating folders by category make it easier for you to manage email notifications. The table below highlights the activities, identifies what notifications are sent and to who, and lists what actions are recommended.

Category	Activity	Key Identifier	Recipient	Action
Opportunity Validation	Partner-submitted opportunity is successfully validated (i.e. 'Status' field = Approved).	In Subject Line: Validated	Primary Contact Email	Please continue to update opportunity in APN Partner Central, until the opportunity is 'Launched' or 'Closed/Lost'.
	Partner-submitted opportunity is not approved (i.e. 'Status' field = Rejected).	In Subject Line: Not Approved (Incomplete)	Partner Contact Email (i.e. APN Partner Central account used to submit opportunity)	If you believe this is in error or would like more details, please connect with your partner manager (PDM/PDR). If you would like a secondary review, please resubmit the opportunity with the additional information requested previously.
	Partner-submitted opportunity is not approved (i.e. 'Status' field = Rejected).	In Subject Line: Not Approved (Invalid)	Partner Contact Email	If you believe this is in error or would like more details, please connect with your partner manager (PDM/PDR). Please ensure that your future submissions do not fall under any of the following cases. 1) Internal Workload 2) Past won opportunity 3) Lead or sales activity that is not mature enough 4) Missing mandatory information 5) No consumption of net new services (e.g. consolidated billing, cost optimization, managed services etc)
	Partner-submitted opportunity is not approved (i.e. 'Status' field = Rejected).	In Subject Line: Not Approved (Forecast Conflict)	Partner Contact Email	If you believe this is in error or would like more details, please connect with your partner manager (PDM/PDR).
	Partner-submitted opportunity is not approved (i.e. 'Status' field = Rejected).	In Subject Line: Not Approved (Duplicate)	Partner Contact Email	If you believe this is in error or would like more details, please connect with your partner manager (PDM/PDR). Please ensure that your future submissions are not already existing in APN Partner Central and/or were not introduced by AWS Seller.
Partner Opportunity Referral	Partner referred opportunity has been validated	In Body: AWS Partner opportunity submission has been validated and assigned	AWS Opportunity Owner Partner Contact Email	Email sent to AWS opportunity owner to review information shared by Partner and engage. Partner is copied in this email as an introduction to the AWS sales contact.
AWS Opportunity Referral	AWS Seller shares a new opportunity with the partner.	In Body: To accept opportunities and access more details	Primary Contact Email Alliance Lead Email	Please accept/decline the opportunity within 5 business days. If accepted, please continue to update opportunity in APN Partner Central.
	AWS Seller shares a new opportunity with a specific email address within the partner organization, but account is not registered in APN Partner Central and does not have access to ACE Pipeline Manager.	In Body: Opportunity was intended to be shared with the following email address	Alliance Lead Email & Primary Contact Email	Please accept/decline the opportunity within 5 business days and assign it to the appropriate owner. If you accept the opportunity, please continue to update opportunity in APN Partner Central.
Lead Management	A list of leads has been transferred within APN Partner organization.	In Subject Line: A lead list view has been transferred	Partner Sales Contact receiving lead view, Partner Contact transferring leads & Alliance Lead	-
Opportunity Management	AWS Seller updates the AWS-referred opportunity.	In Subject Line: Next Steps were updated	Alliance Lead Email	Please continue to update opportunity in APN Partner Central.

Secondary Review Notifications

Category	Activity	Key Identifier	Recipient	Action
Opportunity Research	Clarify Solution: Need clarification regarding the Customer	In Subject Line: Additional Information Requested	Partner Contact Email (i.e. APN Partner Central account used to submit opportunity), Alliance Lead, PDM/PDR	Provide the requested information so that your opportunity can be validated.
	Clarify Revenue: Need clarification regarding the net-new MRR associated with the opportunity.	In Subject Line: Additional Information Requested	Partner Contact Email (i.e. APN Partner Central account used to submit opportunity), Alliance Lead, PDM/PDR	Provide the requested information so that your opportunity can be validated.
	Clarify – Other: Need clarification on information as specified in the APN review comments.	In Subject Line: Additional Information Requested	Partner Contact Email (i.e. APN Partner Central account used to submit opportunity), Alliance Lead, PDM/PDR	Provide the requested information so that your opportunity can be validated.
Opportunity Research – Third Day reminder emails	Clarify Solution: Need clarification regarding the customer pain point/business need, proposed AWS solution, and/or pre-sales activities.	In Subject Line: Additional Information Requested	Partner Contact Email (i.e. APN Partner Central account used to submit opportunity), Alliance Lead, PDM/PDR	Provide the requested information within the next 2 business days so that your opportunity can be validated.
	Clarify Revenue: Need clarification regarding the net-new MRR associated with the opportunity.	In Subject Line: Additional Information Requested	Partner Contact Email (i.e. APN Partner Central account used to submit opportunity), Alliance Lead, PDM/PDR	Provide the requested information within the next 2 business days so that your opportunity can be validated.
	Clarify – Other: Need clarification on information as specified in the APN review comments.	In Subject Line: Additional Information Requested	Partner Contact Email (i.e. APN Partner Central account used to submit opportunity), Alliance Lead, PDM/PDR	Provide the requested information within the next 2 business days so that your opportunity can be validated.

Notifications – Partner Connections

Category	Activity	Key Identifier	Recipient	Action
Partner connections Opportunity Research – Third Day reminder emails	Received an invitation to collaborate	**Email Subject:** Action required: Invitation to collaborate with [Engagement Sender partner name] on opportunity for [Customer company name]	Primary contact, Alliance Lead, Alliance Team, ACE Manager	Review information provided from the sender and respond with accept or reject to the partner on engagement request.
	Collaboration engagement accepted	**Email Subject:** [Engagement Receiver - partner name] accepted request to collaborate for opportunity [Customer company name]	Primary Contact, Alliance Lead, Alliance Lead, ACE Manager	Go to the opportunity and ensure all information is up to date. Start collaboration engagement with partner.
	Collaboration engagement rejected	**Email Subject:** [Engagement Receiver – partner name] has rejected your request to collaborate on opportunity for [Customer company name]	Primary Contact, Alliance Lead, Alliance Lead, ACE Manager	No action needed.
	A new partner has been added to the opportunity collaboration	**Email Subject:** Opportunity collaboration request sent to [Receiving partner name] on [Opportunity Id] for [Customer company name]	Primary Contact, Alliance Lead, Alliance Lead, ACE Manager	Review new partner added details and ensure everything is correct.

Lead Fields

Label	Description	Values
Action	Specific Actions that can be taken on a lead	• Accept, Reject, Update
Status	Statuses to define on-going engagement with the lead	• Open, Research, Qualified, Disqualified
Lead Status Reason	Free-form text field to provide notes associated to a change in lead status	
Lead ID	Unique Identifier associated to every lead	e.g. L2686
Lead Age	Number of days since the lead was shared by AWS	
Company	Company Name of Lead	
Industry	Industry vertical of the lead	Aerospace, Agriculture, Automotive, Computers & Electronics, Consumer Goods, Education, Financial Services, Gaming, Government, Healthcare, Hospitality, Life Sciences, Manufacturing, Marketing & Advertising, Media & Entertainment, Mining, Non-Profit Organization, Oil & Gas, Other, Power & Utilities, Professional Services, Real Estate & Construction, Retail, Software & Internet, Telecommunications, Transportation & Logistics, Travel, Wholesale & Distribution
Use Case/Workload	Proposed solution or workload focus related to the lead engagement	Archiving; Backup & Storage; Batch Processing; Big Data, Analytics, & Business Intelligence; Business Applications - Microsoft; Business Applications - Oracle; Business Applications - Other; Business Applications - SAP; Content Delivery; Data Center Migration; Database & Data Warehouse; Development & Test; Disaster Recovery; High Availability; High Performance Computing; Hybrid Architecture; Internet of Things; Mobile; Other; Web & Web Apps; Training (Note: applicable only to AWS Training Partners)
Segment Company Size	Company size of the lead as defined by number of employees	• 1-19 Employees • 20-99 Employees • 100-499 Employees • 500-999 Employees • 1,000-9,999 Employees • 10,000 Employees or More
Project Description	Free-form text field to add notes regarding the progression of the lead engagement	
Level of AWS Usage	Level of experience on AWS of the lead	• Do not use AWS today • Evaluating/experimenting with AWS • Run dev/test workloads on AWS • Run a single production workload on AWS • Run multiple production workloads on AWS
Campaign Name	AWS Friendly naming convention for AWS Marketing Campaigns	
Campaign Member Status	Status to identify a leads interaction with the associated AWS Campaign source	Attended, Registered, On-demand, Sales Nominated, LDR Owned, Prospect , Nurture
Lead Source	Category of asset or source of lead generation	3rd Party Event/Tradeshow, AWS Marketplace, AWS Sales/BD, AWS Website, AWS Website Contact Us, AWS Website Lead Form, Blog, Reference, Gated Content, Partner Solutions Finder, Purchased List, Training and Certification, Solution Space, Web Case, Webinar
Last Modified Date	Date you last provided an update on an editable field on a lead	
Flag	Marker to label opportunities requiring follow-up	

Lead Status

Lead Status	Description
Open	The lead has been accepted by the Partner but no customer contact has been made
Research	The lead is being reviewed by the Partner to understand customer needs, use case
Qualified	Partner Account Team has engaged with prospect / end customer to discuss viability, understand requirements, etc. Prospect / End customer has agreed the opportunity is real, of interest, and may solve for key business / technical needs.
Disqualified	The lead cannot be nurtured to an opportunity

Lead List Views

Label	Description
Leads Pending Acceptance	Leads shared by AWS that haven't been accepted or rejected
Open Leads	Leads in status 'Open' that have been accepted
Qualified Leads	Leads in status 'Qualified'
Disqualified Leads	Leads in status 'Disqualified'
Leads in Research	Leads in status 'Research'
Flagged Leads	Leads you've flagged for follow-up
Partner Solution Finder Leads	Leads generated from your AWS Partner Solutions Finder Directory Listing
Leads with Campaigns	Leads generated from AWS Marketing Activities i.e. service webinars
Shared by AWS in the last 7 days	Leads shared by AWS in the last 7 days
Shared by AWS this Quarter	Leads shared by AWS this Quarter
Date of last provided update exceeds 2 weeks	Leads that haven't been edited and updated in the previous two weeks

Opportunity Definitions

Lead Status	Description
Co-Sell Opportunity	The opportunity required deal assistance and support from AWS Sales Rep. Multiple types of support can be requested for each opportunity.
For Visibility Only Opportunity	The opportunity is being managed by the Partner and no deal support will be provided by AWS. The AWS Sales Rep has visibility of this opportunity and can request to engage with the Partner.
Limited Visibility Opportunity	The opportunity is being managed by the Partner and its information is not visible to AWS Sales Rep. Opportunity information will only be made available to AWS Sales Rep either when the Limited Visibility flag is removed or when the opportunity is launched or closed/lost.
National Security Opportunity	The opportunity is related to National Security or an Intelligence Community end-customers.

Lead List Views

Label	Description
Leads Pending Acceptance	Leads shared by AWS that haven't been accepted or rejected
Open Leads	Leads in status 'Open' that have been accepted
Qualified Leads	Leads in status 'Qualified'
Disqualified Leads	Leads in status 'Disqualified'
Leads in Research	Leads in status 'Research'
Flagged Leads	Leads you've flagged for follow-up
Partner Solution Finder Leads	Leads generated from your AWS Partner Solutions Finder Directory Listing
Leads with Campaigns	Leads generated from AWS Marketing Activities i.e. service webinars
Shared by AWS in the last 7 days	Leads shared by AWS in the last 7 days
Shared by AWS this Quarter	Leads shared by AWS this Quarter
Date of last provided update exceeds 2 weeks	Leads that haven't been edited and updated in the previous two weeks

Opportunities Definitions

Label	Description	Value
Action	Specific Actions that can be taken against an opportunity	• Edit, Accept, Reject, Update
Status	Status of lead in the AWS Validation Process	• Draft, Submitted, In Review, Action Required, Approved, Rejected
Stage	Stages of an opportunity as defined by the AWS Sales Cycle	• Prospect – opportunity has been identified • Qualified – actively engaged and discussing to understand requirements • Technical Validation – Solution is technically validated by the customer and they have agreed to next steps • Business Validation – Business stakeholders have communicated and agreed upon the financial viability of the solution • Committed – Customer has agreed on the solution and is moving forward • Launched – billing on AWS begins • Closed Lost – No longer an active opportunity
Target Close Date	Projected date of launch for the opportunity	
Delivery Model	The most applicable deployment or consumption model for your solution or services.	• SaaS or PaaS • BYOL or AMI • Managed Services • Professional Services • Resell • Other
Closed Lost Reason	Reason the opportunity will no longer be pursued	• Customer Deficiency • Delay/ Cancellation of Project • Legal/ Tax/ Regulatory • Lost to Competitor – Google • Lost to Competitor – Microsoft • Lost to Competitor – SoftLayer • Lost to Competitor – VMWare • Lost to Competitor – Other • No Opportunity • On Premises Deployment • Partner Gap • Price • Security/ Compliance • Technical Limitations

Label	Description	Value
AWS Account ID	End User Company's AWS Account ID	
Opportunity ID	Unique Identifier associated to each opportunity beginning with 'O'	e.g. O98012
Customer DUNS	DUNS is a unique nine-digit identification number provided by Dun & Bradstreet (D&B) to identify a specific physical entity	e.g., 123456789
Partner Project Title	Partner Opportunity Name	
Customer Business Problem	Opportunity details demonstrating Partner is actively engaged with the end user on the opportunity; Partners should include a clear description regarding pain points, customer need, and what they as a Partner are proposing to solve	
Partner primary need from AWS	Support desired from AWS for the opportunity	• Co-Sell with AWS • Do Not Need Support from AWS Sales Rep
Partner specific needs from AWS for Co-Sell	Specific support type desired from AWS for the opportunity	• Architectural Validation • Business Presentation • Competitive Information • Pricing Assistance • Technical Consultation • Total Cost of Ownership Evaluation • Deal Support • Support for Public Tender / RFx
Opportunity Type	Identifies the type of opportunity based on it being new business or a renewal from a past opportunity	• Net New Business • Expansion • Flat Renewal
Next Steps	Next steps shared with AWS Sales on the opportunity	
Use Case	Proposed solution focus or type of workload	• AI/Machine Learning • Big Data • Business Applications • Cloud Management Tools & DevOps • Containers & Serverless • End User Computing • Energy • Financial Services • Healthcare & Life Sciences • Hybrid application Pipeline Manager • Industrial Software • IoT • Media & High performance computing (HPC) • Migration • Networking • Security • Storage • Training (applicable only to AWS Training Partners)

Label	Description	Value
Sales Activities	Field indicating all the sales activities that already took place on the opportunity	Initialized discussions with customer; Customer has shown interest in solution; Conducted POC / Demo; In evaluation / planning stage; Agreed on solution to business problem; Completed Action Plan; Finalized deployment need; SOW signed
Solution Offered	Field indicating the Partner solution attached to the opportunity	List will display Partner solutions in 'Active' status in APN
AWS Products	Field to indicate one or multiple AWS Products associated with the opportunity	
Expected Monthly AWS Revenue	Expected Monthly AWS Billings tied to the solution/workload at 3 months	
APN Programs	Label to associate an opportunity to one or multiple APN programs/promotions	Multi-select picklist value
Competitive Tracking	Name of competitor (if any) for the opportunity	• Oracle Cloud • On-Prem • Co-location • Akamai • AliCloud • Google Cloud Pipeline Manager • IBM Softlayer • Microsoft Azure • VMware vCloud • Other- Cost Optimization • No Competition • Other
Primary Sales Contact	Name of sales contact within the Partner's firm who is working the opportunity	• I am the Primary Sales Contact • Select a Primary Sales Contact
Partner Sales Contact	Sales contact within the Partner's firm who is working the opportunity	• Name • Email • Phone
Flag	Marker to label opportunities requiring follow-up	

Submission Error Messages

Error Type	Message
Missing Required Field	Closed Lost Reason is required when closing the opportunity
	State is required when Country is United States
	\"Other Need\" field is required when Partner Primary Need From AWS =\"Other\"
	Estimated AWS Monthly Recurring Revenue cannot be blank or 0
	Project description must have minimum of 50 characters
Invalid Data	Select from the predefined Use Case list
	Select from the predefined AWS Field Engagement list
	Select from the predefined Industry list
	Select from the predefined Marketing Development Funded list
	Select from the predefined for Net New Engagement with Customer
	Select from the predefined Primary Need from AWS list
	Customer website should be a valid domain
	Target Close Date should be a future date

Opportunities List Views

Label	Description
All Customer Engagements	All opportunities you've submitted and have been shared by AWS
Draft Opportunities	All opportunities you've created, but, have not completed and submitted
Opportunities in Review	All opportunities you've submitted that are being reviewed by AWS
Validated Open Opportunities	All opportunities that you've submitted, have been validated by AWS are in are in an open sales stage (not 'Launched' or 'Closed Lost')
Committed Opportunities	All opportunities you've created or were shared by AWS that are in stage 'Committed'
Closing this Month	All opportunities you've created that have a close date this month.
Opportunities without Solutions	All opportunities you've created that are open are do not have a valid solution ID attached.
Launched Opportunities	All opportunities you've created or were shared by AWS that are in stage 'Launched'
Opportunities Pending Acceptance	Opportunities shared by AWS that are pending acceptance or rejection
Partner Referred Opportunities	All opportunities you submitted that were Validated by AWS
AWS Referred Opportunities	Accepted opportunities shared by AWS
Flagged Opportunities	All opportunities you've flagged for follow-up
Shared by AWS in the last 7 days	Opportunities shared by AWS in the last 7 days
Shared by AWS this Quarter	Opportunities shared by AWS in the existing AWS quarter (January-March, April-June, July-September, October-December)
Date of last provided update exceeds 2 weeks	All opportunities that lack edits and updates in the previous two weeks
Submitted to AWS in the last 7 days	All opportunities Submitted to AWS in the last 7 days
Submitted to AWS this Quarter	All opportunities Submitted to AWS this Quarter

AWS Sales Stages

Stage	Description
Prospect	Opportunity has been identified. Can be: Active–Came directly from customer/ prospect via lead, etc. Latent–Account Manager believe exists based on research, account plans, sales plays, etc.
Qualified	Account Team has engaged with prospect / customer to discuss viability, understand requirements, etc. Prospect / Customer has agreed the opportunity is real, of interest, and may solve for key business / technical needs.
Technical Validation	Once implementation plan is understood.
Business Validation	Once pricing has been proposed and steps to close have been agreed upon.
Committed	Once launch date is committed and final obstacles understood.
Launched	When workload is complete and billing has started on AWS
Closed Lost	When opportunity is lost and there are no steps to move forward

Deprecated Fields from the older version / experience

- **Project Description – This field is now replaced by 4 new fields – Sales Activities, Custom Business Problem, Solution Offered and AWS Product (Optional).**
- **Sub Use Case – This field is now merged with the 'Use Case' field.**
- **Is this for Marketplace? – You now have the ability to attached a Marketplace Private Offer to an opportunity by clicking on 'Associate Offer' button.**
- **Did AWS Account Rep support you on this? – You can now choose 'Co-Sell with AWS' in Primary Partner Need from AWS field to indicate that the opportunity is a co-sell opportunity.**
- **Was this ACE Opportunity Referral net new business for your company? – You can now choose Net new business, Expansion or Flat Renewal to indicate the Opportunity type.**
- **Contract Vehicle**
- **RFx/Public Tender Solicitation No.**
- **Public Reference**
  - **Is this public reference?**
  - **Public Reference URL**
  - **Public Reference Title**