



APN Customer Engagements Pipeline Manager User Guide

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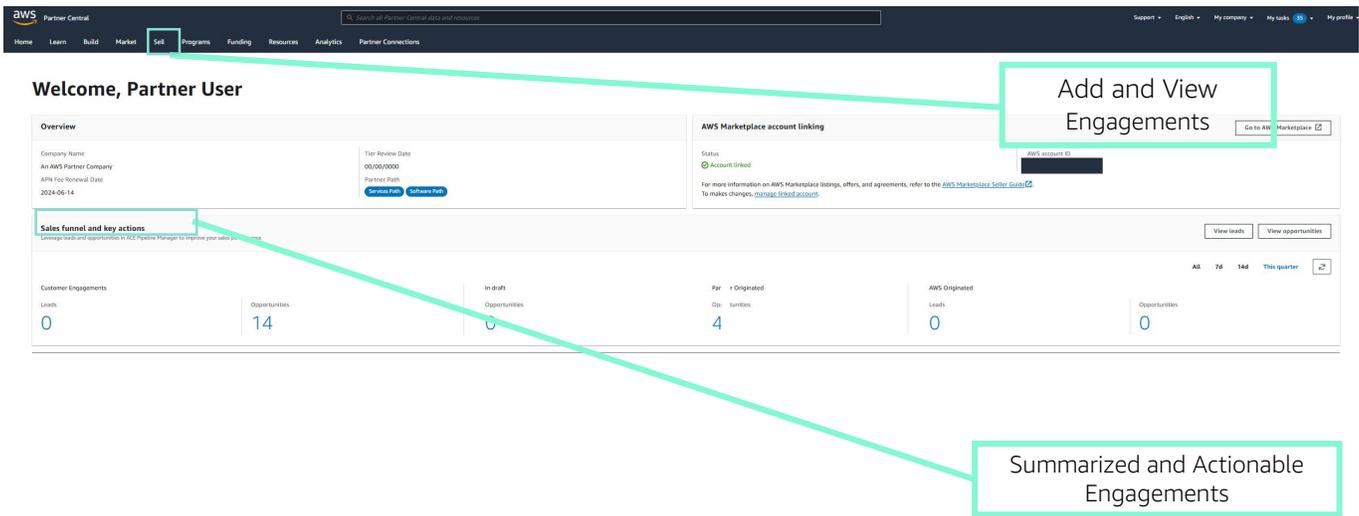


Introduction

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

Overview
Partner ID 6889

Overview

Company Name	Tier Review Date	APN Fee Renewal Date	Partner Path
[REDACTED]	2021-02-06	2024-02-06	Software Path Services Path

AWS Marketplace Manage Linked Account

Status
Accounts linked

AWS account ID
[REDACTED]

Manage your AWS Marketplace listings, offers, and agreements in the [AWS Marketplace Management Portal](#). For more information, consult the [AWS Marketplace Seller Guide](#).

Additional Details

Partner scorecard | Funding Benefits | Customer Reviews | Public Sector Contracts | More Achievements

Partner Path info

Services Path

Partner Path	Path Stage	Current APN Program Fee	Yearly APN Program Fee
Services Path	Confirmed	\$2500 yr	\$2500 yr

Knowledge info

Tier Requirements	Upgrade To Select
AWS Accredited Individuals	252 of 4
Technical	153 of 2
Business	119 of 2
AWS Foundational Certified Individuals	77 of 2
AWS Technical Certified Individuals	39 of 2

Experience info

Tier Requirements	Upgrade To Select
Launched Opportunities	812 of 3
Monthly Recurring Revenue Minimum	\$2,444,988 of \$1,500

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](#).

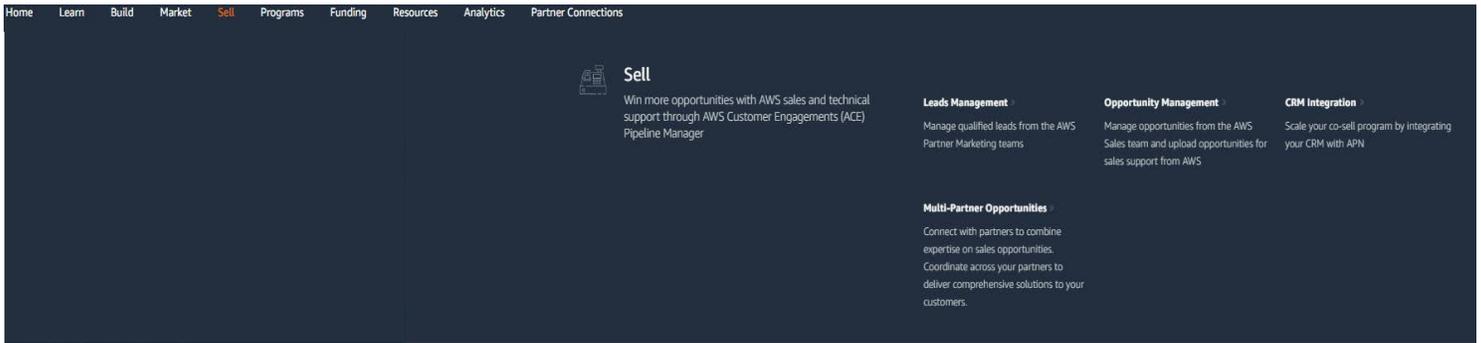
The Alliance Lead must follow the steps below to grant users permissions:

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.

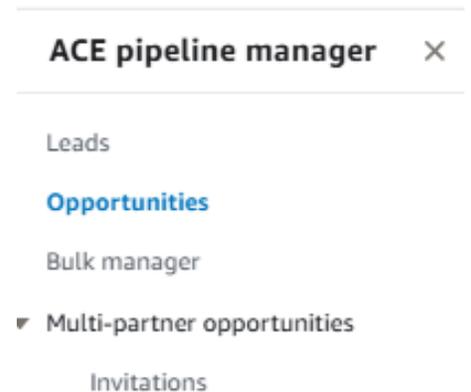
Seller Analytics

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.

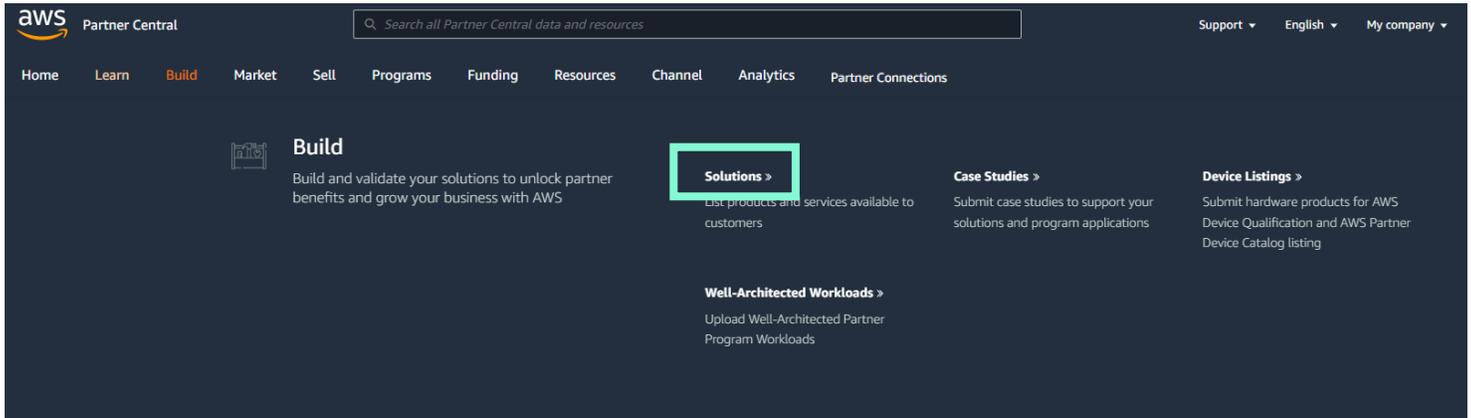
See section on [Partner Connections](#) to learn more.





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](#).

[Home](#) > Solutions

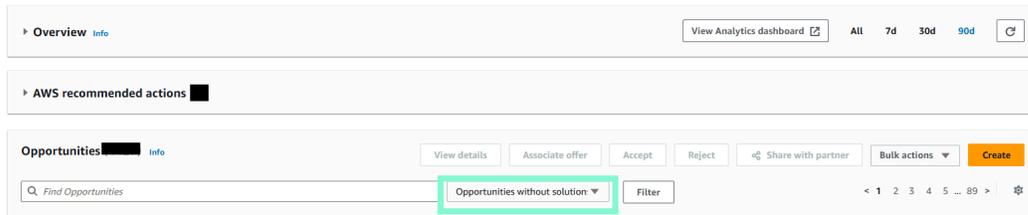
Solutions

AWS broadly defines solutions as the 'products, services or practices you sell to AWS customers.' When you share details about your solution(s), it enables AWS to provide you with the relevant resources and steps to take as part of your journey. Please create solutions that reflect what you are actively selling on AWS as you'll need to link your solutions to every opportunity in the ACE Pipeline Manager. In doing so, we'll recommend and share specific details about your solution to educate AWS Sellers and enhance your discoverability. To unlock additional benefits to help you market, sell and grow your solutions, explore having your solution (s) reviewed and 'validated' by AWS. Learn more [here](#).



Opportunity Updates and solutions

ACE pipeline manager [Info](#)



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.

Welcome, [Redacted]

The screenshot displays the AWS Marketplace Seller dashboard. It is divided into three main sections:

- Overview:** Shows 'Company Name' (redacted) and 'Tier Review Date' (2021-02-06).
- AWS Marketplace:** Shows 'Status' as 'Accounts linked' with a green checkmark, and 'AWS account ID' (redacted). It includes a 'Manage Linked Account' button and a link to the 'AWS Marketplace Management Portal'.
- Sales funnel and key actions:** Features a header with 'View leads' and 'View opportunities' buttons. Below this is a filter bar with 'All', '7d', '14d', and 'This quarter' options, and a refresh icon. The main area is a grid of engagement metrics:

Customer Engagements		In draft	Partner Originated	AWS Originated	
Leads	Opportunities	Opportunities	Opportunities	Leads	Opportunities
1	22	0	6	0	6

Click any link to open a view of those engagement.

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'.

The screenshot shows the AWS Opportunities interface. At the top, there are buttons for 'View Item', 'Associate offer', 'Remove Limited Visibility', 'Accept', and 'Reject'. Below these is a 'Bulk actions' dropdown and a 'Create' button. A search bar contains the text 'Find Opportunities'. The main area displays a table of opportunities with columns for 'Flag', 'Status', 'Stage', and 'Opportunity ID'. A dropdown menu is open over the 'All Opportunities' header, listing various filters like 'Draft Opportunities', 'Opportunities in Review', 'Validated Opportunities', 'Committed Opportunities', 'Closing this Month', 'Launched Opportunities', 'Opportunities Pending Accept...', and 'Partner Referred Opportunities'. The 'Create new view' option at the bottom of the dropdown is circled in green.

Flag	Status	Stage	Opportunity ID	
<input type="checkbox"/>	Not Fla...	Approved	Qualified	01889280
<input type="checkbox"/>	Not Fla...	Submitted	Prospect	01889180
<input type="checkbox"/>	Not Fla...	Approved	Qualified	01889106
<input type="checkbox"/>	Not Fla...	Submitted	Prospect	01889105

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'.

Create new view

Cancel Save

NEW OPPORTUNITY VIEW

* View Name

FILTER(S) Add Filter

To create a new view, click on the drop-down to see the filter options.
 Tip: If filtering by city, state/province, we recommend applying all spelling options (i.e. US, United States) to ensure accuracy.

Field	Operator	Created Date
<input style="width: 90%;" type="text" value="Created Date"/>	<input style="width: 90%;" type="text" value="is"/>	<input style="width: 90%;" type="text"/>

Editing Custom List Views

Cancel Save

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'.

Opportunities (1705) Info

Create
View Item
Associate offer
Remove Limited Visibility
Accept
Reject
Bulk actions ▾

For Visibility Only Opport▼
Filter

< 1 2 3 4 5 ... 23 >
⋮
⚙

Click on 'Edit View' to make changes to this view

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'.

[My Customers](#)> Edit View

demo delete

To create a new view add view name and add view filter(s).

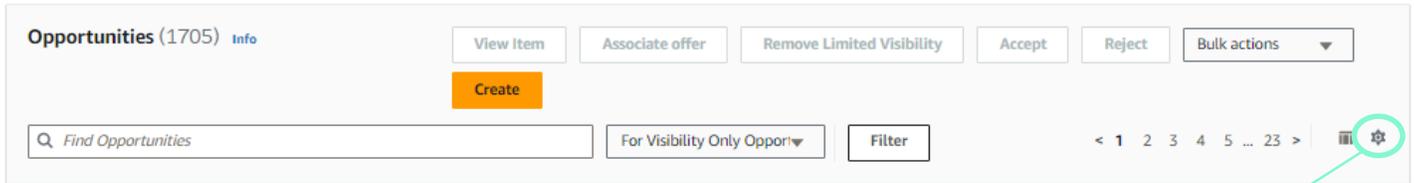
[Delete](#) [Cancel](#) [Save](#)

NEW OPPORTUNITY VIEW

* View Name

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.

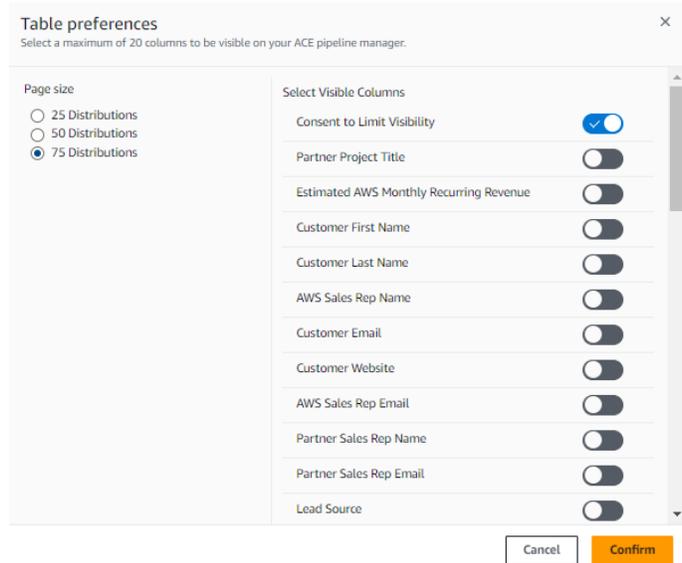


Column Picker

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:

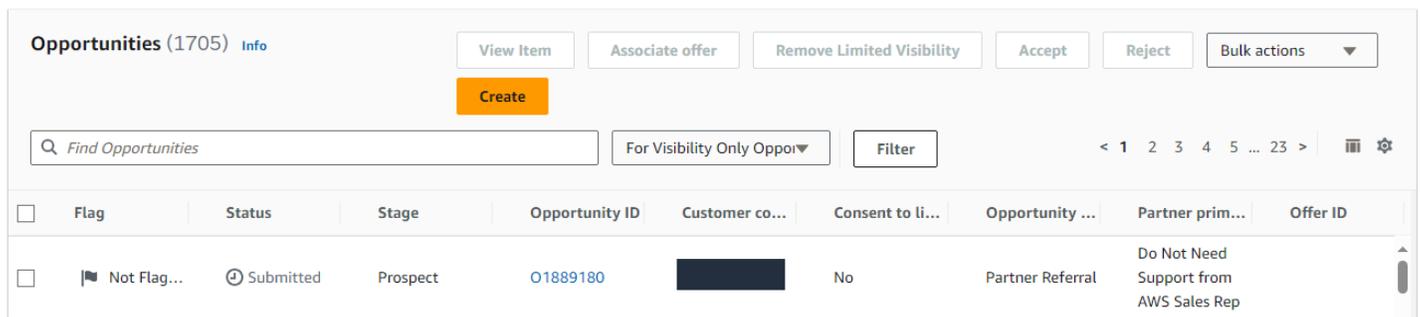
1. Hover over the icon that displays 'Select Columns'
2. Select or deselect available columns
3. Select 'Apply Changes'



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.



Opportunity Creation Button

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

For example: 123456789

Customer Company Name

Industry Vertical

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 ←

For example: www.index.com

Country

Postal Code

City - Optional

Address - Optional

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

- 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.
- 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.

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

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

Sales Activities [Info](#)

What sales activities have happened with the end-customer?

Choose

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.

Customer Business Problem [Info](#)

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

Minimum 20 characters.

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.'

Solution Offered [Info](#)

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

Q Search

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

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.

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.

Use Case

Choose

- 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.

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**

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

APN Programs - *Optional*

Choose

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 to see opportunities that require action and review the 'APN Review Reason' codes in ACE Pipeline Manager.

<input type="checkbox"/> Flag	Status	Stage	Opportunity Id	Customer Company Name	Customer First Name
<input type="checkbox"/>	Not F...	Action ...	Prospect	01305484	Action Required Test

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.

Title

For more information about the opportunity submission process, see the [Opportunity submission partner quick guide](#).

Clone

Overview

Opportunity Id O1876723	Flag Not Flagged	Stage Prospect	Status Submitted
Customer Company Name Load test Opp - 455 - Initial test	AWS Marketplace Engagement Score Info	AWS recommended actions	Opportunity Owner ACN APN
Opportunity Ownership Partner Referral			

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:

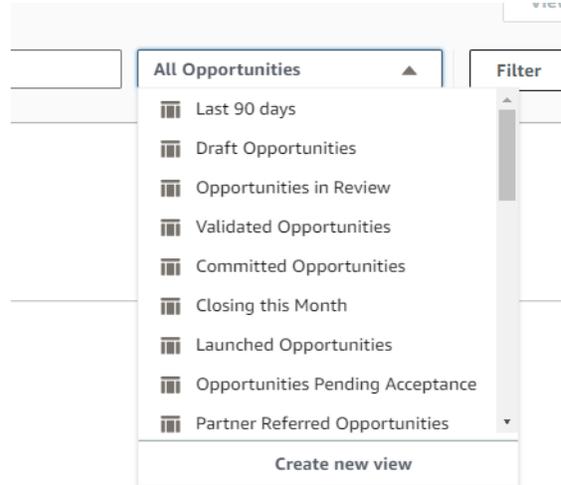
- Opportunity Type, Use Case, Created Date, Partner Project Title, Customer Business Problem, Next Step, Delivery Model, Monthly Recurring Revenue, Target Close Date, Lead Source, Opportunity Ownership

AWS contact fields shared:

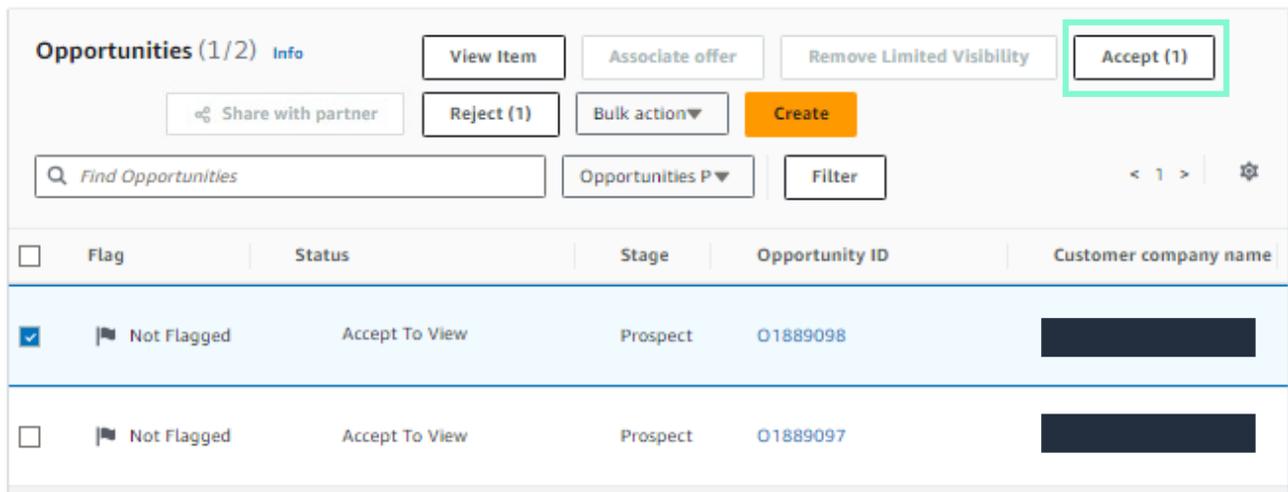
- Name and email of AWS Sales Rep, AWS Account Owner, Partner Success Manager/ISV Success Manager, and Partner Development Manager/ Partner Development Representative, WWPS PDM

To accept an opportunity, follow the steps below:

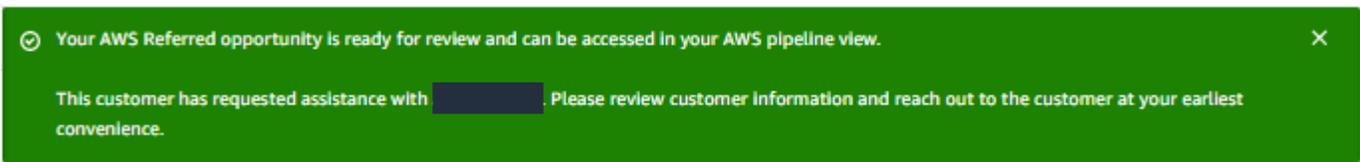
1. From the Opportunities Tab, click 'All Opportunities' and navigate to 'Opportunities Pending Acceptance'



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

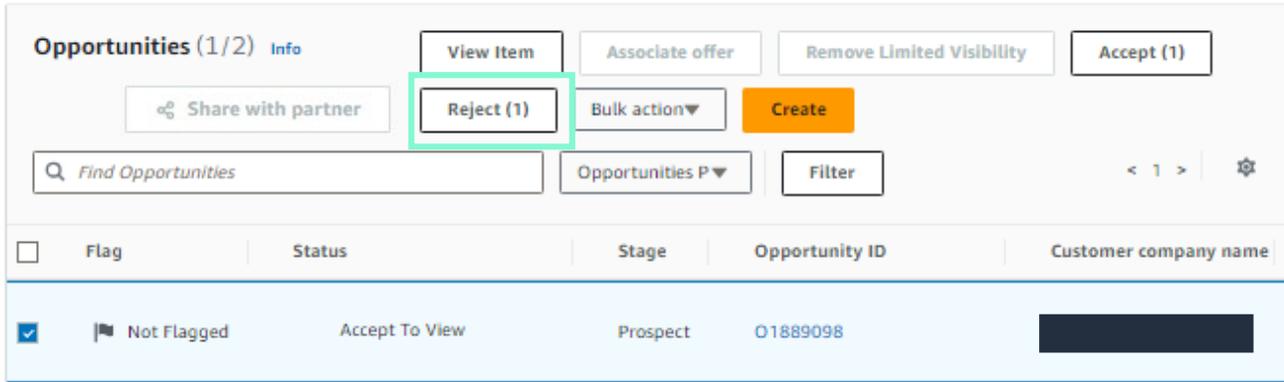


4. Once an opportunity has been 'Accepted', a confirmation will display.

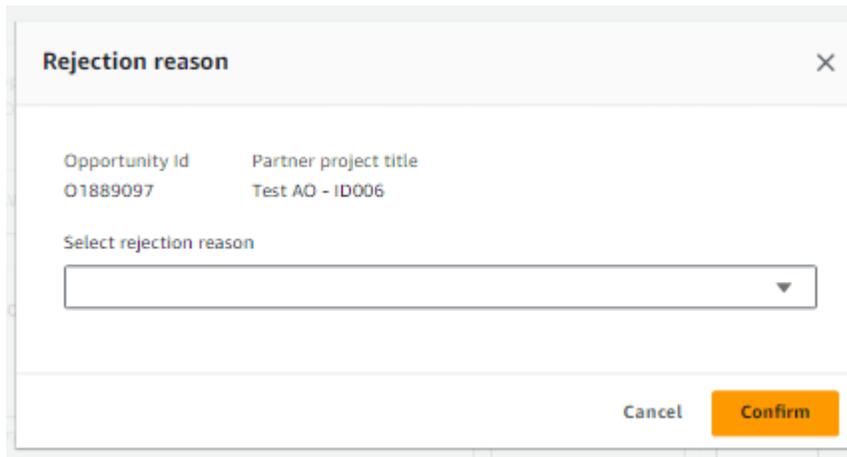


Reject Opportunities

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.

Opportunity Four
 For more information about the opportunity submission process, see [the Opportunity submission partner quick guide](#). [Edit](#) [Share with partner](#) [Transfer](#) [Clone](#) [Change stage](#)

Overview

Opportunity Id 05309419	Flag Not flagged	Stage Qualified	Status Approved
Customer company name An AWS Customer	AWS marketplace engagement score Info	AWS recommended actions Enter Competitor information so AWS can continuously improve customer experience against industry benchmarks.	Opportunity owner Partner User
Opportunity ownership Partner Referral			

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

Edit Opportunity

Customer details

Customer DUNS - *Optional* [Info](#)
 Customer data universal number system, 9 characters

123456789
 For example: 123456789

[Cancel](#) [Save](#)

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

The screenshot shows the 'Opportunity Four' overview page. At the top right, there are buttons for 'Edit', 'Share with partner', 'Transfer', and 'Clone'. A 'Change stage' dropdown menu is open, showing options: Prospect, Qualified, Technical Validation, Business Validation, Committed, Launched, and Closed Lost. The current stage is 'Qualified'. Below the menu, the overview section shows: Opportunity ID (redacted), Customer company name 'An AWS Customer', Opportunity ownership 'Partner Referral', Flag 'Not flagged', AWS marketplace engagement score (Info), and Status 'Approved'.

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

The screenshot shows the 'Next Steps (1) Info' section. There is an 'Add' button in the top right corner. Below it is a table with the following data:

Next step	Created by	Created date
[Redacted]	[Redacted]	9/20/2023 11:42 AM

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

The screenshot shows the 'Next Steps' form. It has a text input field with the placeholder text 'Enter Next Steps Here'. Below the input field, it says 'Next Steps has a maximum of 255 characters'. At the bottom right, there are 'Cancel' and 'Save' buttons.

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).

Additional Details		Edit	
APN Programs	-	Partner CRM Unique Identifier	-
Competitive Tracking	-	AWS Account ID	-
Additional Comments	-	Closed Reason	-
AWS Stage	-	AWS Close Date	-
AWS Closed Lost Reason	-		



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'.

Overview

Flag Not Flagged	Opportunity Id 0921362	Stage Prospect	Status Approved
---------------------	---------------------------	-------------------	--------------------

[Customer details](#) | [Project details](#) | [Additional details](#) | **[Contacts](#)** | [Shared partner details](#) | [AWS Marketplace transactions](#)

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



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'.

Home > ACE pipeline manager > Sample Project Title 1

For more information about the opportunity submission process, see the [Opportunity submission partner quick guide](#).

Overview

Opportunity Id O4653646	Flag Not flagged	Stage Business Validation	Status Approved
Customer company name Reserved for Slack	AWS marketplace engagement score Info	AWS recommended actions Update next steps on the opportunity to effectively engage AWS Sales and expedite deal progression.	Opportunity owner
Opportunity ownership Partner Referral			

Next steps (1) Info

Next step	Created by	Created date
E2E Testing AWS Migration Opp AWSentral Team Test 10		9/27/2024 12:33 AM

Customer details

Customer data universal number system (DUNS)
-

Customer company name
Dev Team Reserved for Slack UAT - Opp

Customer details | Project details | Additional details | Contacts | **Collaboration channels** | Shared partner details | AWS Marketplace transactions

Channel overview [Info](#)

Opportunity eligible for a Slack channel

Choose **Request a Slack channel** to send a channel creation request to your AWS contact.

Request a Slack channel

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

The screenshot shows the 'Request slack channel creation' page. At the top, a green banner indicates 'The opportunity has been saved.' The breadcrumb trail is 'Home > ACE pipeline manager > Sample Project Title 1 > Request slack channel creation'. The page title is 'Request slack channel creation' with an 'Info' link. Below the title, it says 'Request a Slack channel for this opportunity to collaborate with AWS and other key stakeholders.' There is a section for 'Available partner contacts (2134)' with a search bar containing 'Find contacts' and pagination controls. A table lists three contacts:

Contact name	Role	Contact email
<input type="checkbox"/> 02lrh eq2VP	-	con_1-14907@sec.dmk
<input type="checkbox"/> Partner User 1	-	con_1-29526@sec.dmk
<input type="checkbox"/> 02V0u 4NvWy	-	con_1-47515@sec.dmk

The screenshot shows the same page after selecting 'Partner User 1'. The search bar now contains 'Par'. The table below shows 'Partner User 1' selected with a blue checkmark. Below the table, there is a section for 'Selected partner contacts (1)' with a 'Remove' button. At the bottom right, there are 'Cancel' and 'Submit channel request' buttons. A blue arrow points from the 'Submit channel request' button in the previous screenshot to this one.

Below the table, there is a section for 'Selected partner contacts (1)' with a search bar and pagination controls. The table below shows 'Partner User 1' selected with a blue checkmark.

Contact name	Role	Contact email
<input checked="" type="checkbox"/> Partner User 1	Alliance Lead	Partneruser1@email.com

Below the table, there is a section for 'Selected partner contacts (1)' with a search bar and pagination controls. The table below shows 'Partner User 1' selected with a blue checkmark.

Contact name	Role	Contact email
<input checked="" type="checkbox"/> Partner User 1	Alliance Lead	Partneruser1@email.com

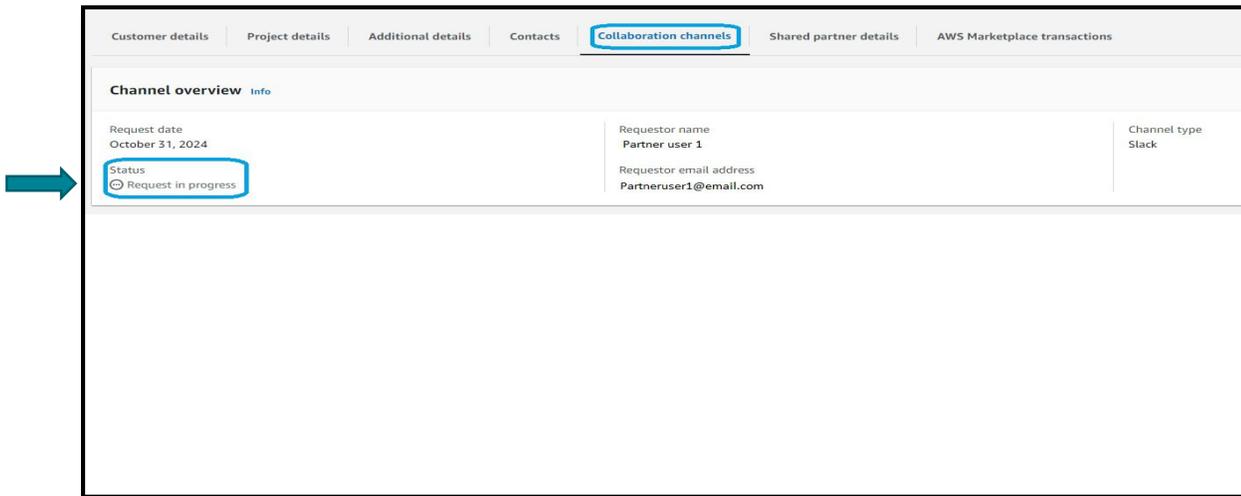
At the bottom of the page, there is a blue information box with a question mark icon. It contains the following text: 'Choosing Submit channel request notifies your AWS opportunity team that you have requested a new Slack channel. You can check the status of your request on the Support channel tab of your opportunity. Selected contacts are automatically added to the opportunity. If your request is approved, AWS creates your Slack channel and sends you an email notification to join.'

At the bottom right, there are 'Cancel' and 'Submit channel request' buttons.

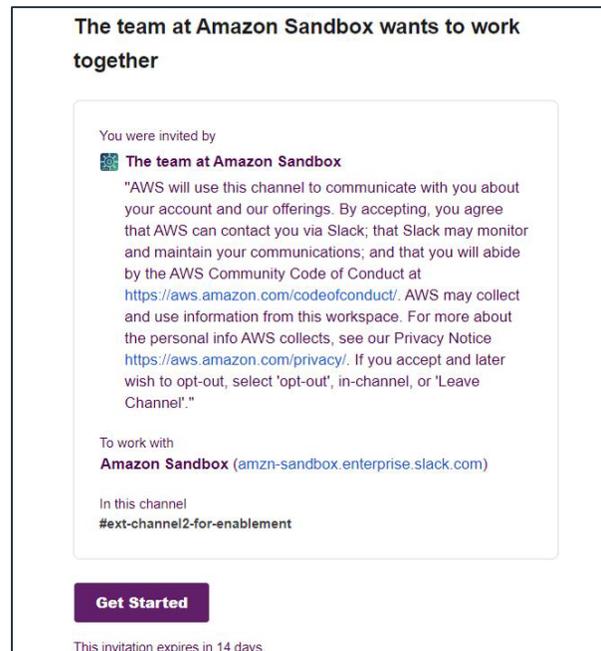
Channel Connection Setup with AWS Secure Connect App on Slack

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)



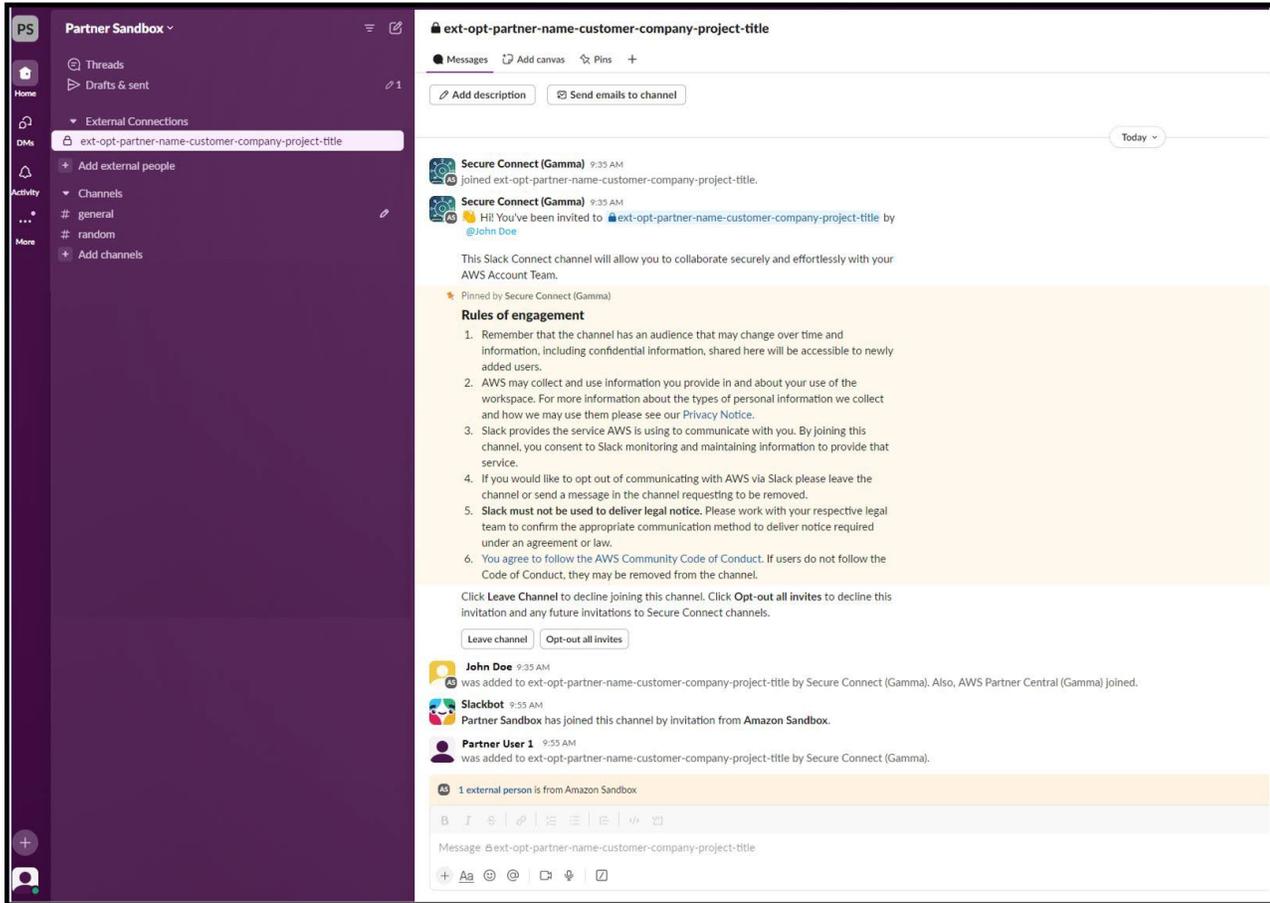
- Email will come from Slack with the following message. If you do not have a Slack license you can install the free version .
- You will have 14 days to accept the invite before it expires.



Channel Connection Setup with AWS Secure Connect App on Slack

Continuation on channel setup instructions

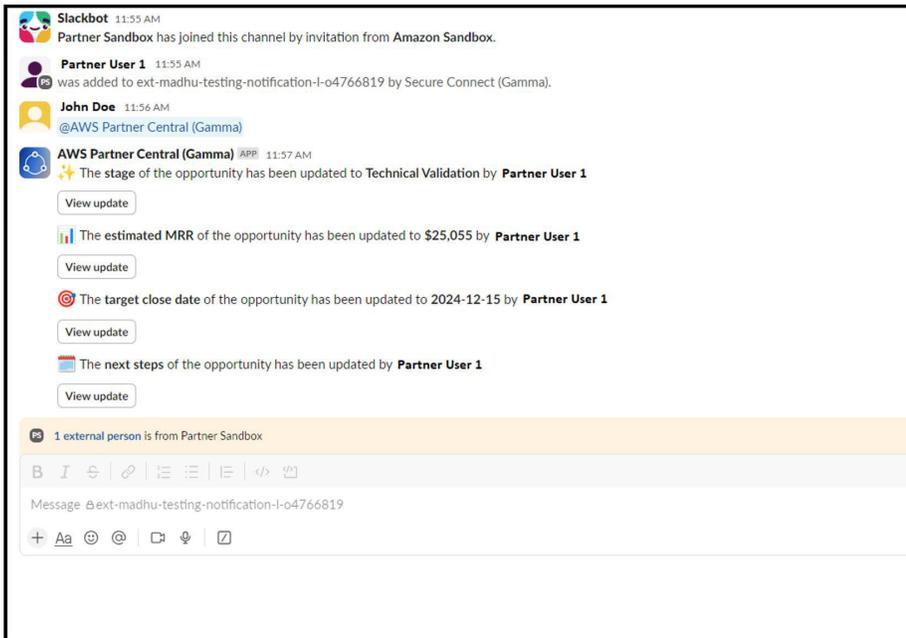
8. Navigate into your Slack App to see channel creation
9. Within the channel you will see AWS Opportunity Team members you can start exchanging updates



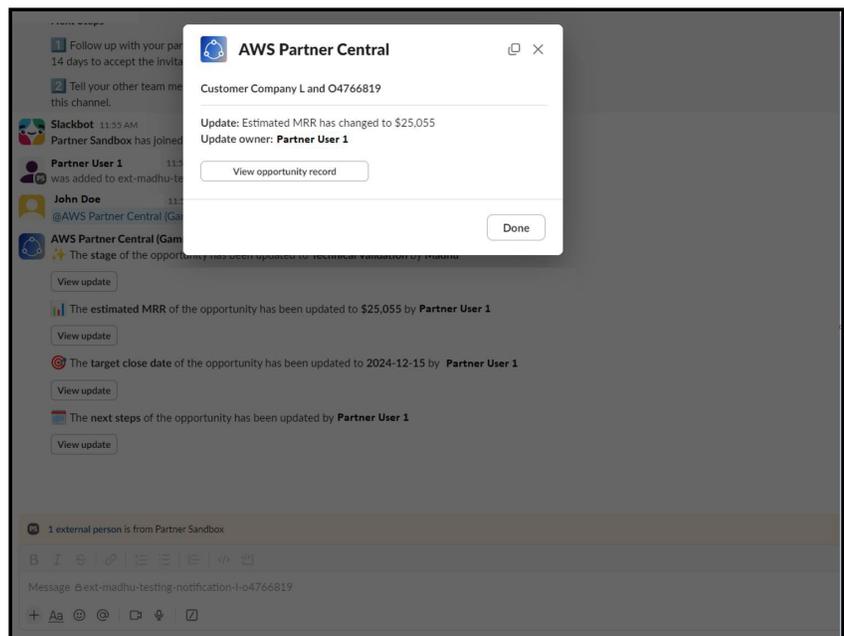
Notifications on Opportunity Channels AWS Secure Connect App on Slack

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.

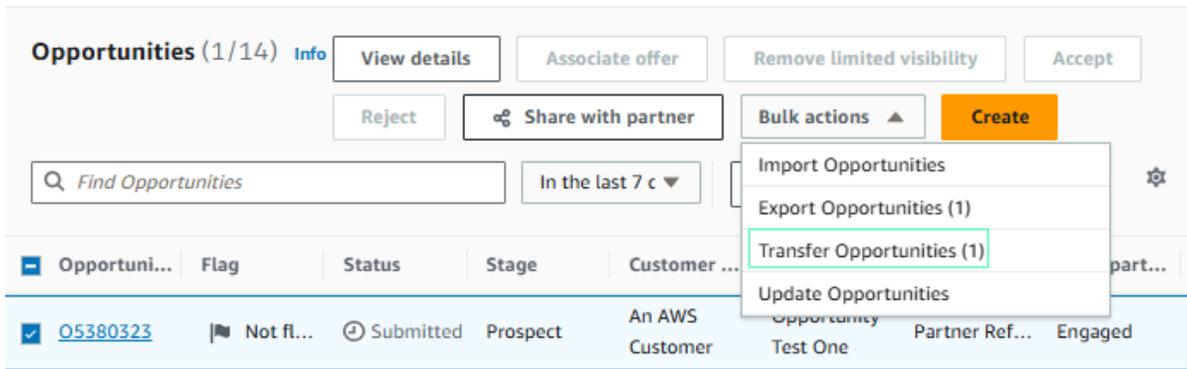


Opportunity Transfer

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.

ACE Pipeline Manager

The ACE Pipeline Manager is available for you to manage your new and existing pipeline of Customer Engagements on AWS.

Leads	Opportunities	Import Manager	Shared Opportunities				
Shared by me ▾ 31 of 31 opportunities							
<input type="text" value="Search all fields"/> <input type="button" value="Search"/> <input type="button" value="⌵"/>							
ACTION	STATUS	STAGE	CUSTOMER COMPANY NAME	OPPORTUNITY ID	LEAD PARTNER	SECONDARY PARTNER	CUSTOMER FIRST NAM
Update	Submitted	Prospect	Test for Partner Connections 9	O728805	AWS Partner Net	Test Account - AC(Read)	APN
Update	Submitted	Prospect	Test for Partner Connections 8	O728804	AWS Partner Net	Test Account - AC(Read)	APN

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.

Would you like to add another Partner to this opportunity?
✕

You can add another Partner to this opportunity who will have full visibility into the opportunity details.

By clicking "Yes" you confirm you have customer consent to share opportunity details with the additional Partner. By clicking "Yes" you confirm you have customer consent to share opportunity details with the additional Partner

No
Yes

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'

[Home](#) > Add Partner Connections

Partner Connections

Your Opportunity has been successfully submitted.
You can now add a Secondary Partner to this opportunity, or do it later.

Secondary Partner

✕

Partner Relationship

Reseller
▼

Access Level

Read
▼

I'll do it later
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:

Project Details | Additional Details | Customer Details | Contacts | **Secondary Partners**

Secondary Partner

Make Active
Make In-active
Add Partner

Shared Partner	Partner Relationship	Opportunity Access Level	Status
	Reseller	Read	✔ Active

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:

aws Partner Central

Support English My company My profile

Home Learn Build Market Sell Programs Funding Resources Analytics

ACE pipeline manager ×

- Leads
- Opportunities
- Bulk manager
- Shared Opportunities

Home > ACE pipeline manager > Opportunities
Info

Overview Info

All 7d 30d 90d

All opportunities (56)		Estimated pipeline revenue		Win rate	Approval rate
AWS Originated	Partner Originated	AWS Originated	Partner Originated	80%	51.28%
17	39	\$391.743K	\$195.327K		

▶ AWS recommended actions (1)

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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:

The screenshot shows the 'Opportunities (4)' interface. At the top, there are buttons for 'View Item', 'Associate offer', 'Accept', 'Reject', and 'Bulk actions'. Below these is a 'Create' button. A search bar contains 'Find Opportunities'. To the right of the search bar are 'Transfer View' and 'Filter' buttons. Further right are pagination controls '< 1 >' and a table icon highlighted with a green box. A callout tip points to this icon: 'Tip: Click here to edit/create a list view'. Below the navigation bar is a table with columns: Flag, Status, Stage, Oppor..., Custo..., Oppor..., Aws ac..., Country, Offer ID. The first row of data shows a flag, 'N...', 'Su...', 'Prospect', '01890299', 'Test C - Rerouting', 'Partne...', and 'Bahamas'.

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:

The screenshot shows the 'Secondary Partners' tab. At the top, there are navigation tabs: 'Project Details', 'Additional Details', 'Customer Details', 'Contacts', and 'Secondary Partners'. Below the tabs are buttons for 'Make Active', 'Make In-active', and 'Add Partner'. The main content is a table with the following columns: 'Shared Partner', 'Partner Relationship', 'Opportunity Access Level', and 'Status'. The first row of data has a redacted name, 'Reseller', 'Read', and 'Active' status.

✔ Opportunity Sharing has been successfully Deactivated. ✕

Home > ACE pipeline manager > Ujala Sync Test

Sync Test

Clone

Once the opportunity is submitted, you will not be able to update it until after it has been approved. Post Approval you are required to update the progress on the Opportunity till closure.

Need help? Click here for the [ACE Opportunity Submission Partner Quick Guide](#)

Overview				
Flag Not Flagged	Opportunity Id O1307128	Stage Prospect	Status Submitted	Customer Company Name sharing yes test

Project Details | Additional Details | Customer Details | Contacts | **Secondary Partners**

Secondary Partner				Make Active	Make In-active	Add Partner
Shared Partner	Partner Relationship	Opportunity Access Level	Status			
<input type="radio"/> [Redacted]	Reseller	Read	Inactive			

✔ Opportunity Sharing has been successfully Activated. ✕

Home > ACE pipeline manager > Ujala Sync Test

Sync Test

Clone

Once the opportunity is submitted, you will not be able to update it until after it has been approved. Post Approval you are required to update the progress on the Opportunity till closure.

Need help? Click here for the [ACE Opportunity Submission Partner Quick Guide](#)

Overview				
Flag Not Flagged	Opportunity Id O1307128	Stage Prospect	Status Submitted	Customer Company Name sharing yes test

Project Details | Additional Details | Customer Details | Contacts | **Secondary Partners**

Secondary Partner				Make Active	Make In-active	Add Partner
Shared Partner	Partner Relationship	Opportunity Access Level	Status			
<input type="radio"/> [Redacted]	Reseller	Read	Active			

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)

The screenshot shows the 'Opportunities (1/6)' section in the ACE Pipeline Manager. The 'Associate offer' button is highlighted with a green box, and a callout arrow points to it with the text 'Click here to associate a Marketplace Private offer'. Other buttons include 'View details', 'Reject', 'Share with partner', 'Bulk actions', 'Create', 'Remove limited visibility', and 'Accept'. Below the buttons is a search bar and a table of opportunities.

Opportuni...	Flag	Status	Stage	Customer ...	Partner Pr...	Opportuni...	Multi part...
<input checked="" type="checkbox"/> O5309419	Not fl...	Approved	Qualified	An AWS Customer	Opportunity Four	Partner Ref...	Engaged

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.

Customer details	Project details	Additional details	Contacts	Shared partner details	AWS Marketplace transactions									
<p>AWS Marketplace offer Info</p> <p style="text-align: right;"> <input type="button" value="Remove offer"/> <input type="button" value="Replace offer"/> </p> <table border="1"> <tr> <td>Offer ID</td> <td>Offer name</td> <td>Offer created date</td> <td>Offer expiry date</td> </tr> <tr> <td>[REDACTED]</td> <td>Offer - 216413440610 - Test product Lemon</td> <td>Oct 7, 2023 07:08 PM (UTC-8:00)</td> <td>Dec 30, 2023 03:59 PM (UTC-8:00)</td> </tr> </table>					Offer ID	Offer name	Offer created date	Offer expiry date	[REDACTED]	Offer - 216413440610 - Test product Lemon	Oct 7, 2023 07:08 PM (UTC-8:00)	Dec 30, 2023 03:59 PM (UTC-8:00)		
Offer ID	Offer name	Offer created date	Offer expiry date											
[REDACTED]	Offer - 216413440610 - Test product Lemon	Oct 7, 2023 07:08 PM (UTC-8:00)	Dec 30, 2023 03:59 PM (UTC-8:00)											
<p>AWS Marketplace agreement (1) Info</p> <p style="text-align: right;">< 1 ></p> <table border="1"> <thead> <tr> <th>Agreement ID</th> <th>Created date (UTC-8:00)</th> <th>Service start date (UTC-8:00)</th> <th>Service end date (UTC-8:00)</th> <th>Offer ID</th> </tr> </thead> <tbody> <tr> <td>[REDACTED]</td> <td>Oct 7, 2023 07:55 PM</td> <td>Oct 7, 2023 07:55 PM</td> <td>-</td> <td>[REDACTED]</td> </tr> </tbody> </table>					Agreement ID	Created date (UTC-8:00)	Service start date (UTC-8:00)	Service end date (UTC-8:00)	Offer ID	[REDACTED]	Oct 7, 2023 07:55 PM	Oct 7, 2023 07:55 PM	-	[REDACTED]
Agreement ID	Created date (UTC-8:00)	Service start date (UTC-8:00)	Service end date (UTC-8:00)	Offer ID										
[REDACTED]	Oct 7, 2023 07:55 PM	Oct 7, 2023 07:55 PM	-	[REDACTED]										

Partner Connections

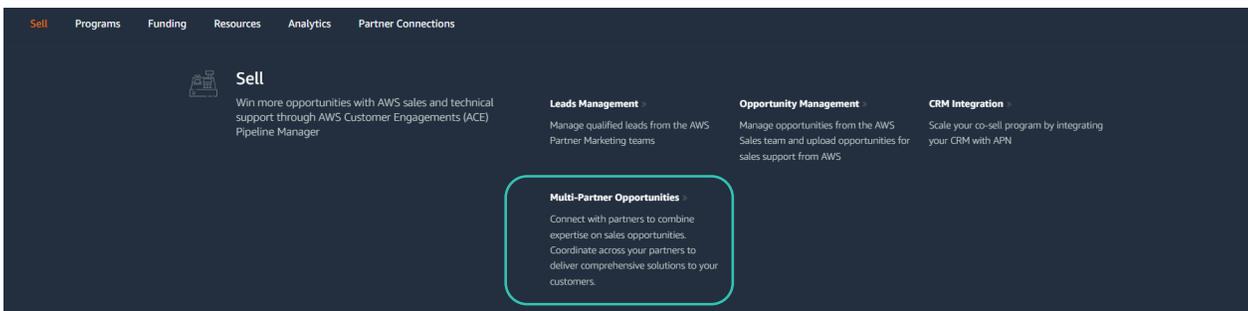
Multi-partner opportunities – Through secure collaboration and joint sales with AWS and other AWS Partners, partners can now seamlessly manage pipeline across both AWS and other collaborating partners on an open pipeline. Leveraging Partner Connection, you can now add or remove partners from shared opportunities. 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 a good fit for collaborating on a given opportunity. These partner profiles will be filtered based on the opportunity and account specific information allowing you to 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.

Home > Multi-partner opportunities

Multi-partner opportunities [info](#) View invitations

Multi-partner opportunities list (132) [info](#) View details | Share with partner

View and manage your multi-partner opportunities in this table.

Find opportunities

<input type="checkbox"/>	Opportunity ID	Customer name	Stage	Created date ↓	Estimated AWS monthly recurrin...	Project Title	Status	Target close date
<input type="checkbox"/>	Q5379323	An AWS Customer	Prospect	Nov 29, 2024	\$5,000.00	Opportunity Seven	Submitted	Feb 25, 2025
<input type="checkbox"/>	Q5377099	An AWS Customer	Prospect	Nov 29, 2024	\$5,000.00	Opportunity Six	Submitted	Feb 25, 2025
<input type="checkbox"/>	Q5375593	An AWS Customer	Prospect	Nov 29, 2024	\$5,000.00	Opportunity Six	Submitted	Feb 25, 2025
<input type="checkbox"/>	Q5316695	An AWS Customer	Prospect	Nov 27, 2024	\$5,000.00	Opportunity Four	Approved	Feb 25, 2025

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

Home > Multi-partner opportunities

Multi-partner opportunities [info](#)

Multi-partner opportunities list (132) [info](#)

View and manage your multi-partner opportunities in this table.

View details | Share with partner

Find opportunities

Opportunity ID	Customer name	Stage	Created date ↓	Estimated AWS monthly recurrin...	Project Title	Status	Target close date
<input type="checkbox"/> OS379323	An AWS Customer	Prospect	Nov 29, 2024	\$5,000.00	Opportunity Seven	Submitted	Feb 25, 2025
<input type="checkbox"/> OS377099	An AWS Customer	Prospect	Nov 29, 2024	\$5,000.00	Opportunity Six	Submitted	Feb 25, 2025
<input type="checkbox"/> OS375595	An AWS Customer	Prospect	Nov 29, 2024	\$5,000.00	Opportunity Six	Submitted	Feb 25, 2025
<input type="checkbox"/> OS316695	An AWS Customer	Prospect	Nov 27, 2024	\$5,000.00	Opportunity Four	Approved	Feb 25, 2025

2. Click on 'View invitations'

Home > Multi-partner opportunities > Invitations

Invitations overview [info](#)

All | 7d | 30d | 90d

Total pending invitations: 40 | Invitations pending your response: 11 | Invitations pending partner response: 29

Only 26 multi-partner opportunity invitations are displayed. To load all of your multi-partner opportunity invitations choose Load all invitations.

Load all invitations

Multi-partner opportunity invitations (26) [info](#)

View and manage your multi-partner opportunity invitations in this table.

View invitation | Accept | Reject

Find invitation

Request type: All

Invitation ID	Project title	Invitation status	Invitation date ↓	Request type	Partner
<input type="checkbox"/> spji-4lu2y3g53udoo	Opportunity Ten	Pending	November 29, 2024	Inbound	An AWS Partner Company
<input type="checkbox"/> spji-nhbawmd56juc	Opportunity Seven	Pending	November 29, 2024	Outbound	AWS
<input type="checkbox"/> spji-kvg2krz4gh3e	Opportunity Nine	Pending	November 29, 2024	Inbound	An AWS Partner Company
<input type="checkbox"/> spji-bwax5a009uavcn	Opportunity Eight	Pending	November 29, 2024	Inbound	An AWS Partner Company
<input type="checkbox"/> spji-ar9ghn78boiam	Opportunity Seven	Pending	November 29, 2024	Inbound	An AWS Partner Company
<input type="checkbox"/> spji-lsl0eibhmcv8g	Opportunity Six	Pending	November 29, 2024	Outbound	AWS

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.

Home > Multi-partner opportunities > Invitations > Opportunity Ten

Opportunity Ten [info](#)

Accept invitation | Reject invitation

Invitation overview [info](#)

Requester name: [redacted]
Requester email: [redacted]
Invitation by: An AWS Partner Company
Invitation status: Pending
Requested date: November 29, 2024
Request expiry date: December 14, 2024

Requester message: Let's collaborate on this deal

Customer details [info](#)

Company name: An AWS Customer
Country: United States
Industry: Software and Internet
Website: [redacted]

Project details [info](#)

Project title: Opportunity Ten
Target close date: February 25, 2025
Customer business problem: customer initiated Free trial on S1/S2/S3 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

Partners (1) [info](#)

All active partners associated to this opportunity

Company name	Website
AWS	aws.amazon.com

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.

Reject invitation ✕

Reason for rejection - optional
Share the reason you're rejecting this multi-party opportunity invite. Your reason is confidential and will not be shared with the other partner.

Reasons for rejecting the invitation

You can enter a maximum of 40 characters. Character count: 0/40

Cancel Reject invitation

Invitations information overview

Home > Multi-party opportunities > Invitations > Opportunity Ten

Accept invitation Reject invitation

Opportunity Ten info

Invitation overview info

Requester name: [redacted]
Requester email: test@gmail.com
Invitation message: Let's collaborate on this deal!
Rejection reason: -

Invitation by: An AWS Partner Company [info](#)
Invitation status: Pending

Requested date: November 29, 2024
Request expiry date: December 14, 2024

Customer details info

Company name: An AWS Customer
Country: United States
Industry: Software and internet
Website: [anawscustomer.com](#)

Project details info

Project title: Opportunity Ten
Target close date: February 25, 2025

Customer business problem: 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

Partners (1) info

All active partners associated to this opportunity.

Company name	Website
AWS	www.aws.com



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.

Home > Multi-partner opportunities > Invitations

Invitations overview info All 7d 30d 90d

Total pending invitations: 40 Invitations pending your response: 11 Invitations pending partner response: 29

Only 26 multi-partner opportunity invitations are displayed.
To load all of your multi-partner opportunity invitations choose **Load all invitations**.

Multi-partner opportunity invitations (26) info
View and manage your multi-partner opportunity invitations in this table. View invitation Accept Reject

Find invitation: Request type: All

Invitation ID	Project title	Invitation status	Invitation date	Request type	Partner
en9i4lu2v3953udoo	Opportunity Ten	Pending	November 29, 2024	Inbound	An AWS Partner Company
en9i9hbawamd5d6juc	Opportunity Seven	Pending	November 29, 2024	Outbound	AWS
en9i4kxp2krzfah3e	Opportunity Nine	Pending	November 29, 2024	Inbound	An AWS Partner Company
en9i4bwa5a009uwxn	Opportunity Eight	Pending	November 29, 2024	Inbound	An AWS Partner Company
en9i4ory9hn28bajam	Opportunity Seven	Pending	November 29, 2024	Inbound	An AWS Partner Company
en9i4usi00ubhmcv89	Opportunity Six	Pending	November 29, 2024	Outbound	AWS

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.

[Home](#) > [ACE pipeline manager](#) > [Opportunities](#)

ACE pipeline manager [Info](#)

Overview [Info](#) View Analytics dashboard [Info](#) All 7d 30d 90d [Info](#)

AWS recommended actions (2)

Opportunities (1/638) [Info](#) View details Associate offer Accept Reject **Share with partner** Bulk actions [Info](#) Create

Validated Opportunities [Info](#) Filter < 1 2 3 4 5 ... 26 >

Opportunity id	Flag	Status	Stage	Customer Company Name	Partner Project Title	Opportunity Ownership	Date Created	Last Updated Date	Multi partner engagement
<input checked="" type="checkbox"/> 35316695	Not flagged	Approved	Prospect	An AWS Customer	Opportunity Four	Partner Referral	2024-11-27	2024-12-02	Engaged

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.

Home > [ACE pipeline manager](#) > [Share with partner](#)

Share with partner [Info](#)
Share the opportunity with a partner inside of the AWS partner network (APN).

Previously invited partners [Info](#)

Partner name	Response status
AnyCompany Channel Solutions	Accepted
An AWS Partner Company	Accepted
AnyCompany Managed Solutions	Accepted

AnyCompany Managed Solutions sender details [Info](#)
Your contact details will be shared with the partner(s).

Email

First name - optional Last name - optional

Business title - optional

Phone number - optional
Enter a valid phone number. For example: +14085550100

Partner details [Info](#)
Provide details about your partner connection. This information will be used to establish the link between your partner connection's organization and the shared opportunity once they accept the invitation.

Partner

Partner connection name [Find partner](#)

Partner engagement type(s) [Choose engagement type\(s\)](#)

Comments to share with the partner
Share additional comments or notes for the partner.

Character count: 0/255

Cancel [Share 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.

The screenshot shows the ACE Pipeline Manager interface. At the top, there's a notification banner. Below it is a table of opportunities. The table has columns for Opportunity ID, Flag, Status, Stage, Customer Company Name, Partner Project Title, Opportunity Ownership, Date Created, Last Updated Date, and Multi partner engagement. The 'Multi partner engagement' column is highlighted with a red box, and its value is 'Engaged'. Below the table is a 'Table preferences' dialog box. The dialog box has a 'Page size' section with radio buttons for 25, 50, and 75 distributions. The 'Select Visible Columns' section has a list of columns with toggle switches. The 'Multi partner engagement' toggle is turned on and highlighted with a red box. A red arrow points from the 'Multi partner engagement' column in the table to the 'Multi partner engagement' toggle in the dialog box.

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.**’

The screenshot displays the 'Opportunity Four' page. At the top, there are buttons for 'Edit', 'Share with partner', 'Transfer', 'Close', and 'Change stage'. The 'Overview' section includes fields for Opportunity ID (05316495), Customer company name (An AWS Customer), Opportunity ownership (Partner Referral), Flag (Not Requested), Stage (Prospect), and Status (Approved). Below this is the 'Next steps' section, which is currently empty. The navigation bar includes tabs for 'Customer details', 'Project details', 'Additional details', 'Contacts', 'Shared partner details' (highlighted), and 'AWS Marketplace transactions'. The 'Partners (4)' section shows a list of partners with their invitation status: 'AnyCompany Channel Solutions' (accepted), 'An AWS Partner Company' (accepted), 'AnyCompany Managed Solutions' (accepted), and 'VSI' (pending). At the bottom, there is a section for 'AI-recommended partners'.

View partner updates

The screenshot shows the 'Partner details' page for 'AnyCompany Channel Solutions'. The page is divided into several sections: 'Partner profile' (AnyCompany Channel Solutions), 'Opportunity owner' (redacted), 'Sales activities', 'AWS products', 'Partner sales contact name', 'Target close date' (February 25, 2025), 'Opportunity stage' (Prospect), 'Opportunity owner email' (user-01@sec.dmk128974), 'Use case', 'Solutions offered', 'Partner sales contact email', 'Opportunity status' (Pending submission), 'Opportunity type' (Net new business), 'Delivery model', and 'Primary need from AWS'. The 'Next steps' section is also visible at the bottom.

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.

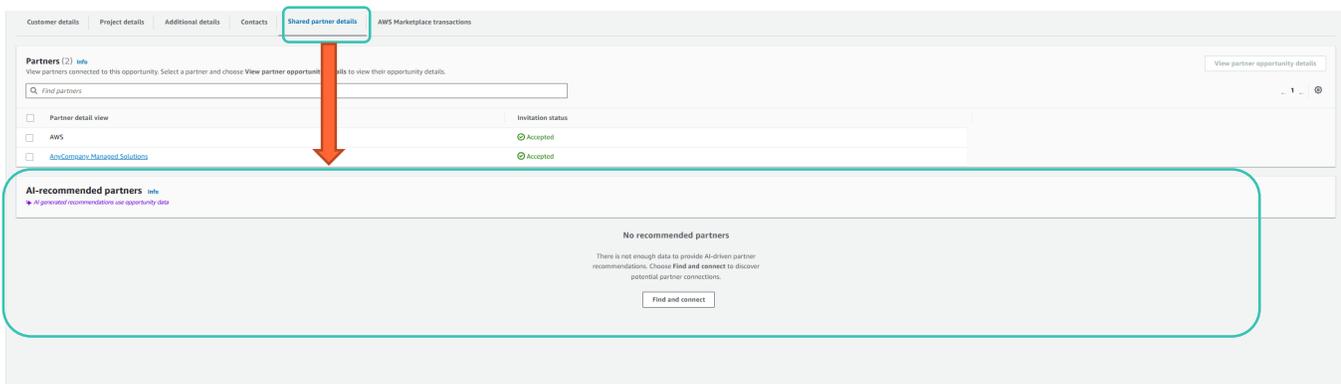
Partner connections – AI Recommended partners

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'.

The screenshot shows the 'Leads' tab selected in the top navigation. A dropdown menu is open under 'All Customer Engagements', with 'Leads Pending Acceptance' highlighted. Below the menu, a table displays lead information with columns: COMPANY, INDUSTRY, USE CASE/WORKLOAD, SEGMENT COMPANY SIZE, COUNTRY, LEAD AGE, and CAMPAIGN NAME. Three rows are visible, representing different lead categories.

COMPANY	INDUSTRY	USE CASE/WORKLOAD	SEGMENT COMPANY SIZE	COUNTRY	LEAD AGE	CAMPAIGN NAME
	Government			United States	67	NA-FY20-Partner-
	Software & Internet			India	67	NA-FY20-Partner-
	Healthcare	Other		United States	67	NA-FY20-Partner-

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

The screenshot shows the 'Leads Pending Acceptance' view. The dropdown menu is set to 'Leads Pending Acceptance' and shows '50 of 91 leads'. The table below has columns: ACTION, STATUS, LEAD ID, COMPANY, INDUSTRY, USE CASE/WORKLOAD, SEGMENT COMPANY SIZE, COUNTRY, LEAD AGE, and CAMPAIGN NAME. The first row is highlighted, and the 'Accept' button in the 'ACTION' column is highlighted with a red box.

ACTION	STATUS	LEAD ID	COMPANY	INDUSTRY	USE CASE/WORKLOAD	SEGMENT COMPANY SIZE	COUNTRY	LEAD AGE	CAMPAIGN NAME
Accept Reject	Open	L291547		Government			United States	67	NA-FY20-Partner-
Accept Reject	Open	L291592		Software & Internet			India	67	NA-FY20-Partner-
Accept Reject	Open	L291573		Healthcare	Other		United States	67	NA-FY20-Partner-

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' .

All Customer Engagements ▾										
23 of 23 leads										
ACTION	STATUS	LEAD ID	COMPANY↑	INDUSTRY	USE CASE/WORKLOAD	SEGMENT	COMPANY SIZE	COUNTRY	LEAD AGE	CAMPAIGN NAM
<input type="checkbox"/> Update	Open	L116495	[REDACTED]	Financial Services	Big Data, Analytics, & Business Intelligence	100-499 Employees	US	112	[REDACTED]	[REDACTED]

Click for update options

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'.

Company

EDIT

CONVERT

LEAD DETAILS

Lead Id	L4068
Company	Company
Campaign Name	Campaign Name

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

Step 4: Contact details

Edit

Contact details

Customer First Name

████████

Customer Last Name

████████

Customer Title

Business Executive

Customer Email

██

Customer Phone

████████████████

Partner details

Primary Contact First Name

Primary Contact Last Name

Primary Contact Title

Primary Contact Email

Primary Contact Phone

Back

Save as draft

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.

	Leads	Opportunities	Import Manager						
Opportunities in Review									
1 of 1 opportunities									
	Search	+ Add	Bulk Actions						
ACTION	STATUS	STAGE	OPPORTUNITY ID	CUSTOMER COMPANY NAME	CUSTOMER FIRST NAME	CUSTOMER LAST NAME	AWS SALES REP NAME	CREATED DATE	LAST MODIFIED DAT
<input type="checkbox"/>	Submitted	Prospect	O143420	Sample	First	Last		2019-04-08	2019-10-25

Viewing 1-1 of 1 opportunities Results per pag

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).

ACE pipeline manager

The ACE Pipeline Manager is available for you to manage your new and existing pipeline of Customer Engagements on AWS.

	Leads	Opportunities	Import Manager	Shared Opportunities									
All Customer Engagements													
7 of 7 Leads													
	Search	Bulk actions											
ACTION	STATUS	LEAD ID	COMPANY	INDUSTRY	USE CASE/WORKLOAD	SEGMENT	COMPANY SIZE	COUNTRY	LEAD AGE	CAMPAIGN NAME	CAMPAIGN MEMBER STATUS	LEAD SOURCE	
<input checked="" type="checkbox"/>	Update	Open	L624166		Business Applications - Other			United States	378			Partner Solutions Finder	2023-01-11

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'

ACE pipeline manager

The ACE Pipeline Manager is available for you to manage your new and existing pipeline of Customer Engagements on AWS.

	Leads	Opportunities	Import Manager	Shared Opportunities									
All Customer Engagements													
7 of 7 Leads													
	Search	Bulk actions											
ACTION	STATUS	LEAD ID	COMPANY	INDUSTRY	USE CASE/WORKLOAD	SEGMENT	COMPANY SIZE	COUNTRY	LEAD AGE	CAMPAIGN NAME	CAMPAIGN MEMBER STATUS	LEAD SOURCE	
<input checked="" type="checkbox"/>	Update	Open	L624166		Business Applications - Other			United States	378			Partner Solutions Finder	2023-01-11

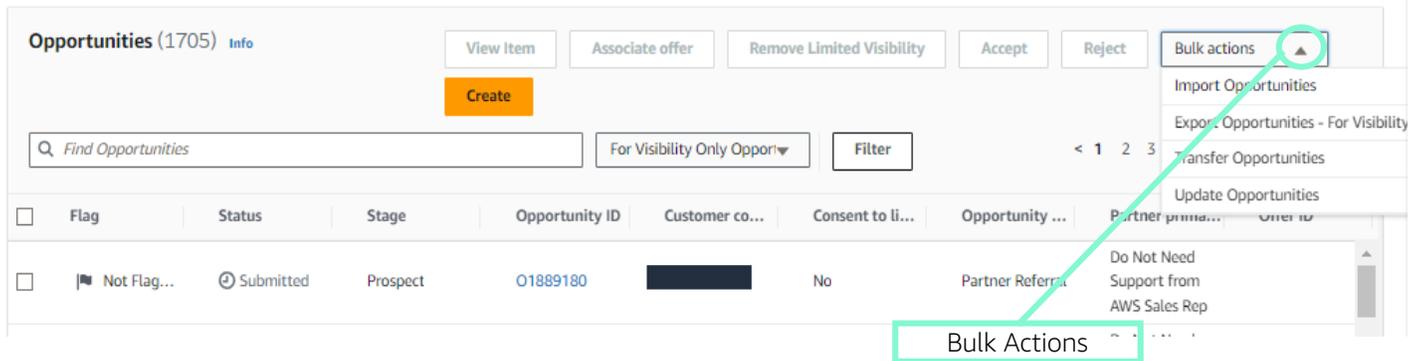
3. Type in the name of the new Lead owner to search and click 'Save'.

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.

How it works

- Step 1: Download & Prepare CSV
- Step 2: Upload CSV
- Step 3: Preview Opportunities
- Step 4: Review Results

How it works

ACE Pipeline Manager Bulk Import
These are the steps for bulk import

Partner's CRM
Export your opportunity details to share with AWS

Download
Download the latest template

Prepare
Prepare the CSV file to import

Validate
validate and import records

Review
Review results

In-line edit or download file
In-line editing: Fix unsuccessful records via in-line editing
Download file: Fix unsuccessful records via downloadable file

Instructions

Bulk Import allows ACE Users to submit up to 250 opportunities at once to maximize efficiency during opportunity submission. To begin your Bulk Import, click on 'Start Import'.

Support Resources

Click the links below for guidance on bulk importing opportunities. If you need additional assistance, please contact your AWS Representative.

- [ACE Pipeline Manager User Guide](#)
- [How to utilize Bulk Actions?](#)
- [How to convert Non-English data files into CSV?](#)

Cancel **Start Import**

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:

My Customers > Import results

Download & Prepare CSV file for import Info

How it works

Step 1
Download & Prepare CSV

Step 2
Upload CSV

Step 3
Preview Opportunities

Step 4
Review Results

Downloaded the latest excel template
Last Updated On (mm/dd/yyyy): 10/12/2023

Download the Excel file below to ensure that your file meets the required criteria. This file has been formatted to reflect the fields and language in which you view APN Partner Central. To change the language, locate the language setting pick-list value within APN Partner Central.

[Download latest excel template](#) | [Preview latest excel template](#)

Prepare file to import

Prepare file to upload: Fill downloaded template with all required fields. Review conditionally required fields and optional fields and fill them as necessary to ensure successful import. You can now review "validation" tab to verify validity of core fields.

Note: The validations in template are not comprehensive and users need to verify template for its completeness as per required fields and format. Expand below for required fields:

► **Required Fields**
Ensure that file being uploaded has all required fields:

Products and Offering

Insert the Offering ID in your import CSV to tag solutions to the opportunity.
Insert the Product code in your import CSV to tag AWS products to the opportunity.
Your offered solutions and AWS products can be viewed [here](#).

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:

Cancel Previous Next

Dynamic sheet with products and solutions to attach on the template

- 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.

E	F	G	H	I	J	K	L	M
Country - required	State/Province - required if Country = United States	Postal Code - required	Website - required	Partner Primary Need from AWS - required	Partner Project Title - required	Customer Business Problem - required	Solution Offered - required	Other Solution Offered - required if Solution Offered = Other
						Describe customer pain point/business problem you are trying to address. <min 20 chars>		

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'.

My Customers > Import results

Upload CSV [Info](#)

How it works

- Step 1
[Download & Prepare CSV](#)
- Step 2
Upload CSV
- Step 3
[Preview Opportunities](#)
- Step 4
[Review Results](#)

Upload your prepared CSV file

Select File
When the file is saved as a (.csv), a window will pop-up asking to verify if you want to only save the active sheet. Click on "okay" to continue.

Browse your device and select the csv file you just prepared for the bulk import.

Opportunity Import Template_test.csv X
File size in bytes: 2846
Last date modified: 2023-10-19 10:52:46

Cancel

Required Fields – Header in **YELLOW**

Field Name (REQUIRED)	Formatting Requirements
Customer Company Name	80 characters maximum
Industry Vertical (<i>pick-list value</i>)	<p><u>Required Conditional Field:</u></p> <ul style="list-style-type: none"> 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) <ul style="list-style-type: none"> Required field when Industry Vertical selected is 'Other', 255 characters maximum <u>Government and Education</u> selections make the following mandatory: <ul style="list-style-type: none"> Does opportunity belong to NatSec? – (Column D)
Country (<i>pick-list value</i>)	<p><u>Required Conditional Fields:</u></p> <ul style="list-style-type: none"> 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) <ul style="list-style-type: none"> When country equals '<u>United States</u>', 'State/Province' in Column F becomes a required field
Postal Code	<ul style="list-style-type: none"> Field is specific to the end customer's billing postal code 20 characters maximum If the postal code <u>starts with zero</u>, reformat the cell to "Text" Attention to the formatting according to each country. Refer to the <u>values tab</u> and follow the postal code format of the country selected. <u>If your country does not have a postal code leave it blank</u>
Customer Website	<ul style="list-style-type: none"> It needs to be a <u>valid domain</u> <u>No customer social media pages allowed</u> 255 characters maximum If the domain ends in .co add a "/" at the end (e.g.: www.domain.co/)
Partner Primary Need From AWS	<p><u>Required Conditional Field:</u></p> <ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 20 character minimum Describe the customer's pain point or business problem you are trying to address
Solution Offered	<ul style="list-style-type: none"> Here you can enter the <u>solution ID</u> for the solution you are considering to address customer's business problem. If you do not have an solution ID, please enter "Other". <ul style="list-style-type: none"> When you enter 'Other', then Other Solution Offered becomes required (Column M). Describe the solution offered in a max of 255 characters.

Use Case (<i>pick-list value</i>)	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> <u>Future date</u> 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	<ul style="list-style-type: none"> 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 (<i>pick-list value</i>)	<ul style="list-style-type: none"> 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)	<ul style="list-style-type: none"> Select 'Yes' or 'No'. If you select 'Yes', the following field becomes mandatory: <ul style="list-style-type: none"> Was Marketing Development Funds Used? (required if Is Opportunity from Marketing Activity? = Yes) – (Column U) If you select 'Yes', the following field becomes optional: <ul style="list-style-type: none"> 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)	<ul style="list-style-type: none"> 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:

- If Industry Vertical = 'Other', the vertical will need to be specified in Column C
- If Industry Vertical = 'Government' or 'Education', the additional field is requested: 'Does opportunity belong to NatSec?' (Column D)
- If selected country is 'United States', then 'State/Province' becomes a required field (Column F)
- If Solution Offered = 'Other', then 'Other Solution Offered' becomes required (Column M)
- 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)	<ul style="list-style-type: none"> • 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: <u>separate each Product ID by a “,”</u>
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 (<i>pick-list value</i>)	<u>Required Conditional Field:</u> <ul style="list-style-type: none"> • State is a required field when country equals 'United States' <ul style="list-style-type: none"> ◦ 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 (<i>pick-list value</i>)	<u>Required Conditional Fields:</u> <ul style="list-style-type: none"> • Needs to map to valid selection. See 'Values' sheet contains mapping • Other Competitors (Column AI) <ul style="list-style-type: none"> ◦ If selected Competitive Tracking is 'Other', Column AJ becomes required (255 characters max)
Marketing Development Funded?	Pick-list value <ul style="list-style-type: none"> • Needs to map to valid selection. See 'Values' sheet contains mapping
Primary Sales Contact, First Name, Last Name and Title	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • '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.

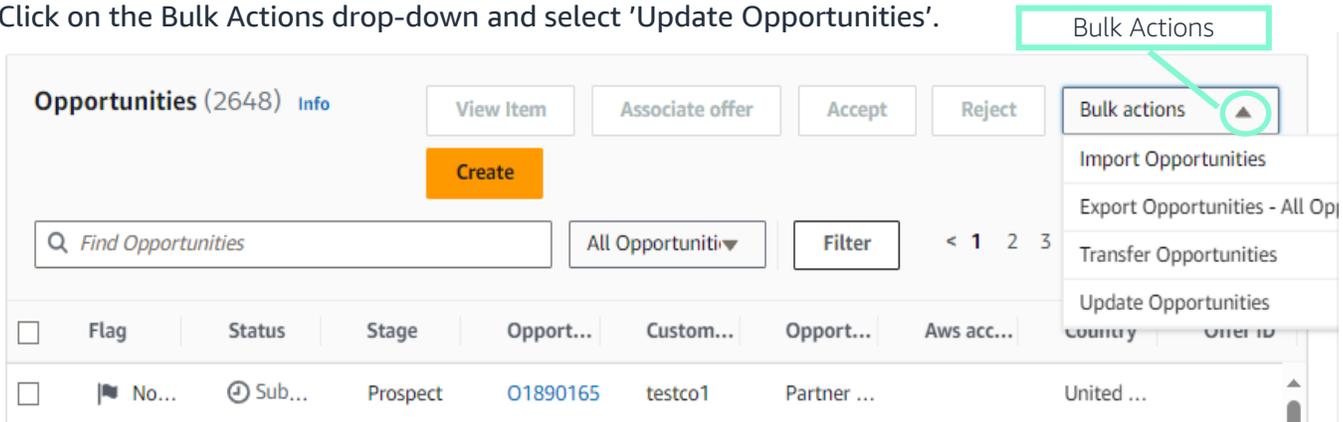
Note: you will export all the opportunities in the current filter view you have selected.

Update Opportunities

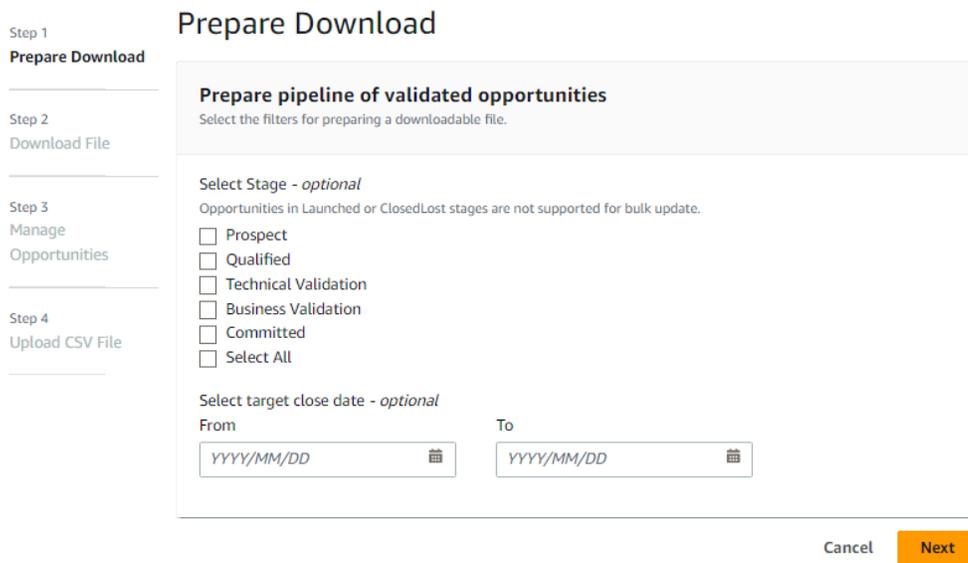
The bulk update functionality provides the ability to export validated opportunities to make changes to in bulk.

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, then click 'Upload CSV File'.

Step 1
Prepare Download

Step 2
Download File

Step 3
Manage Opportunities

Step 4
Upload CSV File

Upload CSV File

Step 3: Upload saved CSV file to finish pipeline update

Upload new CSV file below. Once updated, press the select option below. This step initiates the update and completes the process to update pipeline in bulk. Note opportunities updated correctly will successfully update. Any updates made with an error can be found in the error excel file below.

Choose File

Browse your device and select the csv file you just prepared for the bulk import.

✔

UpdatePipeline.csv ✕

File size in bytes: 12572

Last date modified: 2023-10-21 22:58:28

Cancel
Previous
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

✔ Successfully updated the opportunities. View or download the processed record logs from the Bulk updates tab in Bulk manager.

Go to Bulk updates

✕

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.

Bulk manager Info

Bulk imports

Bulk updates

Bulk updates (1) Info

Check the status of bulk updates initiated in the last 7 days and download logs to view which records were successful or unsuccessful.

Download log(s)

Bulk update

< 1 >

	Status	Start time ...	End time (...)	Unsuccess...	Successful...	Processed ...
○	✔ Comple...	2023-10-2...	2023-10-2...	1	12	13



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.

ACE pipeline manager [Info](#)

The screenshot shows the 'Overview' section of the ACE pipeline manager. It includes summary statistics for 'All opportunities (0)', 'Partner Originated' (0), 'Estimated pipeline revenue' (\$0), 'WIN rate' (0%), and 'Validation rate' (0%). Below this is the 'Opportunities (2/82)' section, which features a search bar, a filter dropdown set to 'All Opportunities', and a table of opportunities. A 'Bulk acti...' menu is open, showing options like 'Import Opportunities', 'Export Opportunities - All...', 'Transfer Opportunities (2)', and 'Update Opportunities'. The table has columns for Flag, Status, Stage, Opportunity Id, Customer Company Name, Customer First Name, Customer Last Name, AWS Sales Rep Name, Opportuni..., Date Creat..., and Resell.

Flag	Status	Stage	Opportunity Id	Customer Company Name	Customer First Name	Customer Last Name	AWS Sales Rep Name	Opportuni...	Date Creat...	Resell
<input type="checkbox"/>	Not F...	Draft	Prospect	O1308551				Partner Re...	2023-03-01	2023-03-01
<input checked="" type="checkbox"/>	Not F...	Submit...	Prospect	O1307812				Partner Re...	2023-02-22	2023-02-22 SaaS or PaaS
<input checked="" type="checkbox"/>	Not F...	Submit...	Prospect	O1307128	sharing yes test			Partner Re...	2023-02-10	2023-02-10 SaaS or PaaS
<input type="checkbox"/>	Not F...	Submit...	Prospect	O1305496	shared oppty test			Partner Re...	2023-01-17	2023-01-17 Resell

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.

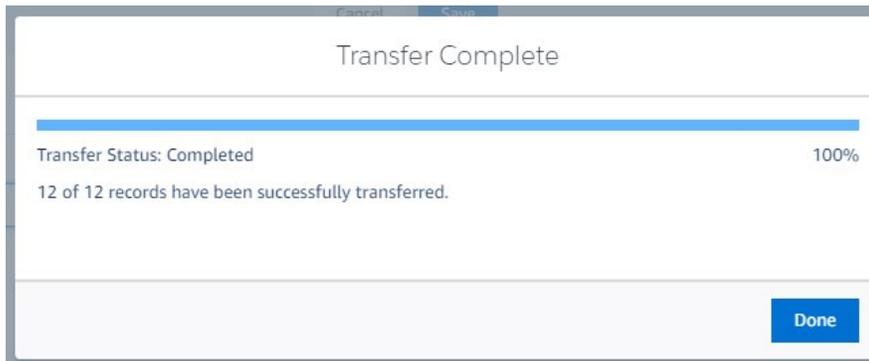
All

Transferring Ownership of 2 selected Opportunities

WHO WOULD YOU LIKE TO TRANSFER THIS VIEW TO?

* User

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.

Transfer Status: Completed (11/21/2019 7:51:42 AM) | Records processed successfully: 12 of 12 records | Actions:

ACE Pipeline Manager

The ACE Pipeline Manager is available for you to manage your new and existing pipeline of Customer Engagements on AWS.

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.

The screenshot shows the 'Opportunities (2/3)' interface. At the top, there are buttons for 'View Item', 'Associate offer', 'Accept', and 'Reject', along with a 'Bulk actions' dropdown menu. Below these are a 'Create' button, a search bar labeled 'Find Opportunities', and buttons for 'Transfer View' and 'Filter'. The 'Bulk actions' dropdown menu is open, showing options: 'Import Opportunities', 'Export Opportunities (2)', 'Transfer Opportunities (2)', and 'Update Opportunities'. The 'Transfer Opportunities (2)' option is highlighted with a green box. Below the menu is a table with columns: Flag, Status, Stage, Opportu..., Customer..., Opportu..., Aws acco..., Country, and Offer ID. Two rows are visible in the table, both with a checkmark in the 'Flag' column and 'Prospect' in the 'Stage' column.

Flag	Status	Stage	Opportu...	Customer...	Opportu...	Aws acco...	Country	Offer ID
<input checked="" type="checkbox"/>	Not ...	Submi...	Prospect	O1890165	testco1	Partner R...	United St...	
<input checked="" type="checkbox"/>	Not ...	Submi...	Prospect	O1890164	testco	Partner R...	Germany	

- 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.**

Transfer Opportunities

Transfer View View

Transferring Ownership of 2 selected Opportunities

Who would you like to transfer this view to?

User

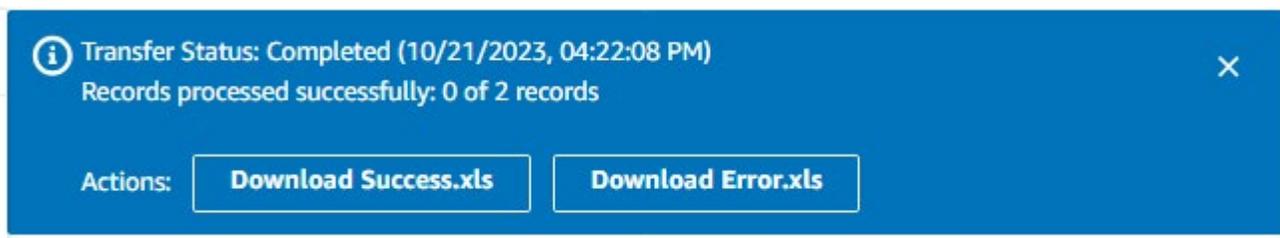
Cancel Transfer

- 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.

- 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.



- Click on any of the buttons to download the opportunity transfer logs

Opportun	Partner Pr	Status
0768608	Cloud IT T	The opportunity cannot be modified in Submitted, Rejected or In review status.
0768609	Cloud IT T	The opportunity cannot be modified in Submitted, Rejected or In review status.
0769745	Cloud IT T	The opportunity cannot be modified in Submitted, Rejected or In review status.
0769746	Cloud IT T	The opportunity cannot be modified in Submitted, Rejected or In review status.
0769748	Expected I	The opportunity cannot be modified in Submitted, Rejected or In review status.
0769751	Expected I	The opportunity cannot be modified in Submitted, Rejected or In review status.

- 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.

Step 1
Add customer details

Step 2
Add project details

Step 3 - optional
Add additional details

Step 4 - optional
Add contact details

Step 5
Review and create

Add project details

For more information about the opportunity submission process, see the [Opportunity submission partner quick guide](#).

Project details

Partner primary need from AWS

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.

Limited Visibility [Info](#)

Allows you to limit visibility of this opportunity from the AWS Sales team
Would you like to submit this opportunity as Limited Visibility?

Yes

No



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:

ACE pipeline manager [info](#)

Overview [info](#) All 7d 30d 90d

All opportunities (0) AWS Originated 0	Partner Originated 0	Estimated pipeline revenue AWS Originated \$0	Partner Originated \$0	WIN rate 0%	Validation rate 0%
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Opportunities (129) [info](#) View Item Remove Limited Visibility Accept Reject Bulk actions Create

All Opportunities Filter 1 x < 1 2 3 >

Flag	Status	Stage	Opportunity Id	Customer Company Name	Consent to Limit Visibility	Partner Project Title	Estimated ...	Customer First Name	Customer Last Name	AWS Sales Rep Name	Opportuni...	Next Step
<input type="checkbox"/>	Not F...	Approved	Prospect	O1305509	[REDACTED]	No	[REDACTED]	\$2,000.00	[REDACTED]	[REDACTED]	Partner Re...	[REDACTED]
<input type="checkbox"/>	Not F...	Approved	Qualified	O1259362	[REDACTED]	No	[REDACTED]	\$1,944,80...	[REDACTED]	[REDACTED]	AWS Referral	[REDACTED]
<input type="checkbox"/>	Not F...	Approved	Launched	O1254084	[REDACTED]	No	[REDACTED]	\$10,000.00	[REDACTED]	[REDACTED]	AWS Referral	[REDACTED]
<input type="checkbox"/>	Not F...	Approved	Prospect	O1237257	[REDACTED]	No	[REDACTED]	\$5,000.00	[REDACTED]	[REDACTED]	Partner Re...	[REDACTED]
<input type="checkbox"/>	Not F...	Approved	Launched	O1203378	[REDACTED]	No	[REDACTED]	\$25,000.00	[REDACTED]	[REDACTED]	Partner Re...	[REDACTED]
<input type="checkbox"/>	Not F...	Approved	Prospect	O1185445	[REDACTED]	No	[REDACTED]	\$10,000.00	[REDACTED]	[REDACTED]	Partner Re...	[REDACTED]

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

Opportunities (129) [info](#) View Item Remove Limited Visibility Accept Reject Bulk actions Create

All Opportunities Filter 1 x < 1 2 3 >

Flag	Status	Stage	Opportunity Id	Customer Company Name	Consent to Limit Visibility	Partner Project Title	Estimated ...	Customer First Name	Customer Last Name	AWS Sales Rep Name	Opportuni...	Next Step
<input type="checkbox"/>	Not F...	Approved	Prospect	O1305509	Limited Vis Oppty	No	Limited Vis Oppty	\$2,000.00	[REDACTED]	[REDACTED]	Partner Re...	[REDACTED]
<input type="checkbox"/>	Not F...	Approved	Qualified	O1259362	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

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	<ul style="list-style-type: none"> Accept, Reject, Update
Status	Statuses to define on-going engagement with the lead	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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/Tradeshaw, 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	<ul style="list-style-type: none"> Edit, Accept, Reject, Update
Status	Status of lead in the AWS Validation Process	<ul style="list-style-type: none"> Draft, Submitted, In Review, Action Required, Approved, Rejected
Stage	Stages of an opportunity as defined by the AWS Sales Cycle	<ul style="list-style-type: none"> 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.	<ul style="list-style-type: none"> SaaS or PaaS BYOL or AMI Managed Services Professional Services Resell Other
Closed Lost Reason	Reason the opportunity will no longer be pursued	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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 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 and 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**