
AWS IQ

User Guide for Experts



AWS IQ: User Guide for Experts

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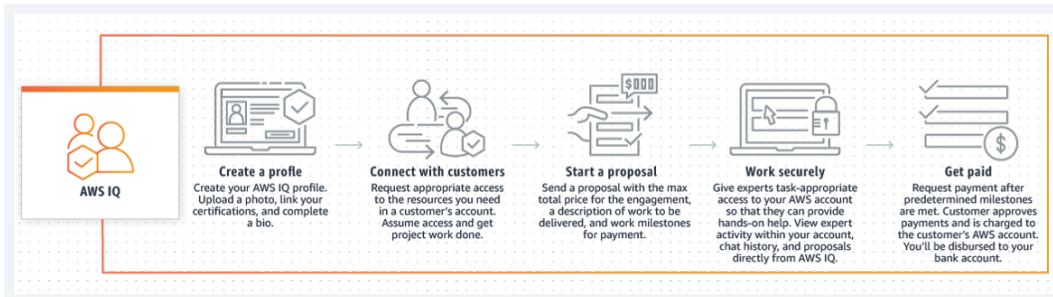
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What Is AWS IQ for Experts?

AWS IQ is a service that helps customers get hands-on help with Amazon Web Services (AWS). If you are based in the United States and have an active AWS certification (Associate, Professional, or Specialty), you can sign up to become an expert in AWS IQ. As an expert, you can get paid for work you complete for customers within their AWS account.

How It Works

In the AWS IQ console, customers create requests for hands-on help. Experts respond to the requests. As an expert, you can see requests when customers create them. Before you start working on a project, customers and experts typically chat and exchange information about the request in more detail. After you understand the scope of the work, you create a proposal with tasks, milestones, and payment terms. Customers grant you task-appropriate permissions to their AWS account, and you perform the work on their behalf in their account. You get paid as work is completed.



AWS IQ is a great way to put your skills to work, provide direct help to customers, and get paid for it. AWS IQ helps you find customers who value your expertise while you decide when and where you want to work. With AWS IQ, you can keep using your skills and gain additional experience developing AWS solutions. As an AWS certified expert, you are a member of a community of AWS certification holders who love the variety and challenge of helping AWS customers build on AWS.

To participate in AWS IQ as an expert, you must have achieved at least one active AWS certification (Associate, Professional, or Specialty), and have a US home address and tax information. AWS certifications help learners build credibility and confidence by validating their cloud expertise with an industry-recognized credential. To learn more about certifications, visit <http://aws.amazon.com/certification>.

Getting Paid

As an expert you set the price for your services. Other fees and charges may apply. Payments are processed through AWS Marketplace and charged directly to a customer's AWS bill. For more information, see the *Set up Payments* section of [Getting Started as an Expert in AWS IQ \(p. 2\)](#).

Getting Started as an Expert in AWS IQ

To get started using AWS IQ, sign up as an expert if you meet the requirements below. Don't forget to set up payment information too.

[AWS certification](#) holders (Associate, Professional, and Specialty) are eligible to become AWS Certified experts in AWS IQ. Set up your payments and add information to your expert profile by using the AWS IQ console. A completed profile includes a photo, proof of achieved certifications, and a short biography. Individuals can include links to case studies or examples of completed work.

AWS Certified experts must be based in the United States. To receive payments, experts must also provide banking and tax details by [registering as a seller on AWS Marketplace](#).

Topics

- [Sign Up to Become an Expert](#) (p. 2)
- [Set up Payments in AWS IQ](#) (p. 3)
- [Create your Expert Profile](#) (p. 4)
- [Setting Up Account Permissions to Use AWS IQ](#) (p. 6)

Sign Up to Become an Expert

After you're approved as an expert, you can access the AWS IQ console and add information to your expert profile. The requirements and procedures here guide you through the sign up process.

For more information, see <https://aws.amazon.com/iq/experts>.

Prerequisites

All of the following must be true to become an AWS Certified expert in AWS IQ.

- Valid AWS certification (Associate, Professional, or Specialty).
- Based in the US with valid tax and banking information.
- An AWS Identity and Access Management (IAM) user account with `AWSIQFullAccess` managed policy. Learn more about [Setting Up Account Permissions to Use AWS IQ](#) (p. 6).
- An AWS account with multi-factored authentication (MFA) enabled. Learn more about [Enabling Multi-factor Authentication \(MFA\) Devices](#) in the *AWS Identity and Access Management User Guide*.

Note

AWS IQ supports the following browsers: Google Chrome (version 72 or later), Mozilla Firefox (version 66 or later), or Apple Safari (version 10 or later).

Sign Up

Use the following procedure to register as an expert in AWS IQ.

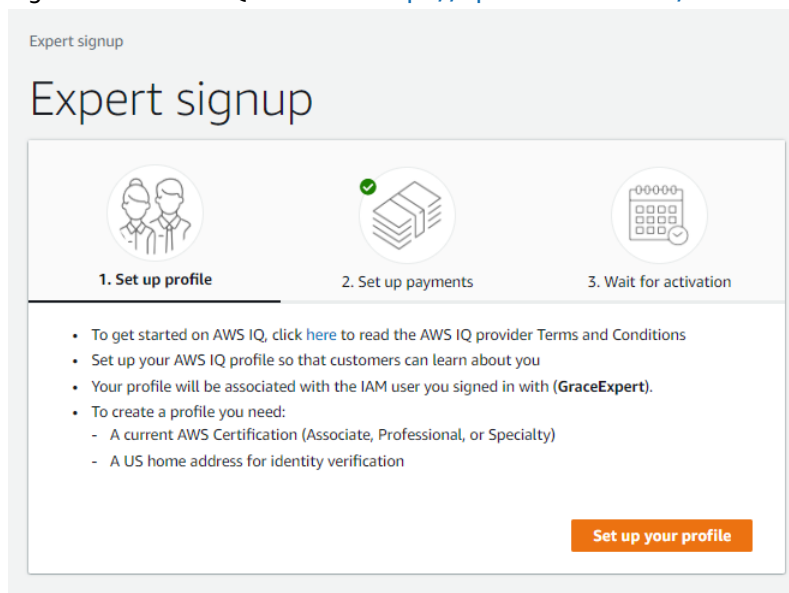
Companies can complete AWS seller information (payment and disbursement) one time for all employees. Employees use an AWS Identity and Access Management (IAM) account under the AWS account of the company to link to the company's payment information. The company only needs to complete payment setup one time.

Note

Setting up your profile and setting up payments can be completed in any order.

To Register:

1. Sign in to the AWS IQ console at <https://iq.aws.amazon.com/work>.



2. Set up payments by following the procedure in the following topic: [Set up Payments in AWS IQ \(p. 3\)](#).
3. Set up your profile by following the procedure in the following topic: [Create your Expert Profile \(p. 4\)](#).

Set up Payments in AWS IQ

To be activated as an expert in AWS IQ, you must set up an AWS Marketplace account with your payment and tax information.

For members of a firm, all team members can use the same seller account. Each team member can set up his or her own AWS IQ profile using an AWS Identity and Access Management (IAM) user in the firm's AWS account. Expert profiles must be set up one per individual.

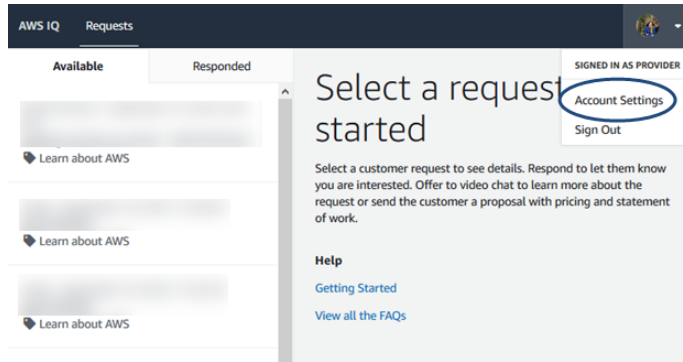
Initial Payment Setup

In AWS IQ, you set up payments through AWS Marketplace when you first sign up.

Updating Your Payment Information

After setting up your payment information, you can update it by going to **Account settings** in the AWS IQ console. You are directed to AWS Marketplace to edit your seller information.

Sign in to the AWS IQ console at <https://iq.aws.amazon.com/>. Open your profile by choosing the down arrow next to your account, and then choosing **Account settings**.



On the Profile page, choose **Payments**.

Create your Expert Profile

Create a profile to tell customers more about your areas of expertise and skills. The procedure here provides tips and tricks for entering profile information.

Enter Your Personal Information

When you add personal information, such as a name and a profile picture, you increase the credibility of your expert profile. You can earn trust with customers when your profile is more complete.

When you set up your profile, keep the following things in mind:

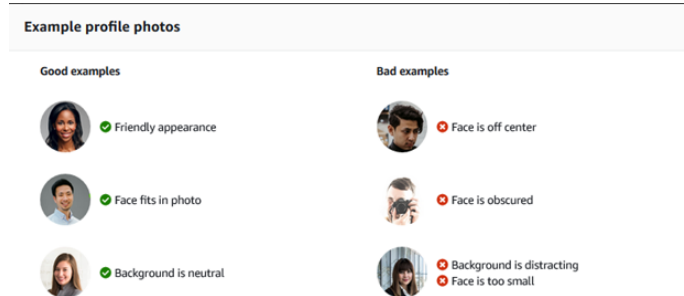
- Your **Display name** is the name a customer sees on your profile and when you chat in AWS IQ.
- Your **Email address** is not shared with customers. All AWS IQ email notifications are sent to this address.
- Your **Profile photo** can be JPG, PNG, or GIF format. You can always add a photo or change it later.

Choose a Great Photograph

Your face should take up at least 60 percent of the frame. Crop the picture from the top of your shoulders to just above your head so that your face fills the frame.

Use an approachable and friendly expression. Don't force an unnatural smile, but also don't look too serious.

Use a simple background that does not distract from your face.



Link Your AWS Certifications

Only Associate, Professional, and Specialty certifications are accepted. An AWS certification account can only be linked to one profile.

[Learn more about getting AWS Certified.](#)

Describe Your Skills and Experience

Help customers by making your experience as scannable as possible. Include headers and short, descriptive sentences and bullet points where possible.

If you have integrated or used any third-party services or applications with AWS also include them, e.g. Tableau or WordPress.

Describe what your strengths and interests are, e.g. migrating databases or configuring new instances of Amazon Redshift.

Give an indication of how long you have been working in this field, e.g. "I have been an AWS Solutions Architect for more than 10 years."

List the types of engagements you like to work on, e.g. "I am available for short consultations."

Example:

I have more than 10 years of hands-on experience with AWS. I've worked with many clients migrating workloads to AWS or helping them design and build new cloud solutions. I am also capable of helping you with security related work.

I am experienced and comfortable helping troubleshoot production or performance problems in AWS, as well as helping you plan scalable, cost effective, and secure solutions.

I am proficient in WordPress and love helping clients large and small. I'd be happy to answer questions in a consultation or complete end to end project work.

Set Hourly Rate

Setting your rate is optional, but it gives customers an idea of your fees. Use a wide range if you are flexible on pricing.

Verify Your Identity and Review Your Profile

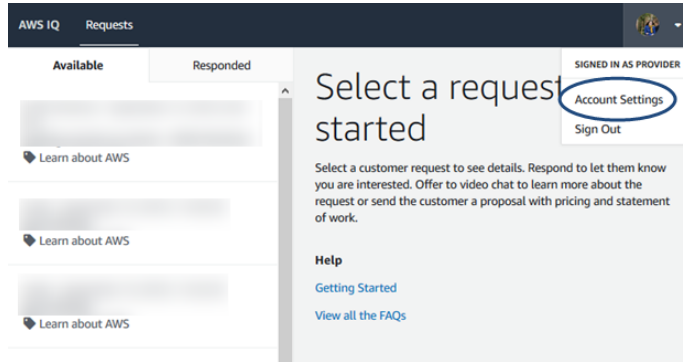
AWS IQ verifies your identity for security purposes. You must have a US address. The information collected is shared with a third party for verification purposes. It is not shown to customers or stored.

You can review or edit your profile at any time. Check for anything you might want to add or change, and then save your profile.

Updating Your Profile

After you have been activated as an expert, you can continue to edit your profile in the AWS IQ console.

To edit your profile, sign in to the AWS IQ console at <https://iq.aws.amazon.com/>. Open your profile by choosing the down arrow next to your account, and then choosing **Account settings**.



You can preview your profile at any time by choosing **Preview profile**.

Setting Up Account Permissions to Use AWS IQ

AWS IQ requires that you sign in with an AWS Identity and Access Management (IAM) user account that has both the **AWSIQFullAccess** and **IAMFullAccess** managed policies. If you are the administrator of your account, you should be all set. This topic describes how to create an IAM user or attach policies to an existing IAM user.

Create an IAM User with AWSIQFullAccess and IAMFullAccess Permissions

You or your AWS account administrator can create a new IAM user with the **AWSIQFullAccess** and **IAMFullAccess** managed policies on your AWS account. You can also attach these policies to an existing IAM user.

To create a user:

1. Sign in to the IAM console at <https://console.aws.amazon.com/iam/>.
2. Choose **Users**.
3. Choose **Add user**.
4. Type a user name, and then choose **AWS Management Console Access**.

Accept all the defaults, or change them to a custom value if you prefer.

Add user 1 2 3 4 5

Set user details

You can add multiple users at once with the same access type and permissions. [Learn more](#)

User name*

[Add another user](#)

Select AWS access type

Select how these users will access AWS. Access keys and autogenerated passwords are provided in the last step. [Learn more](#)

Access type* **Programmatic access**
Enables an **access key ID** and **secret access key** for the AWS API, CLI, SDK, and other development tools.

AWS Management Console access
Enables a **password** that allows users to sign-in to the AWS Management Console.

Console password* Autogenerated password
 Custom password

Require password reset User must create a new password at next sign-in
Users automatically get the `IAMUserChangePassword` policy to allow them to change their own password.

* Required Cancel Next: Permissions

5. Choose **Next: Permissions**.
6. Choose **Attach Existing Policies Directly**.
7. Choose both **AWSIQFullAccess** and **IAMFullAccess**, and then choose **Next: Tags**.
8. *(Optional)* Add tags, and then choose **Next: Review**.
9. Choose **Create user**.
10. Choose **Show** to show the password.
11. Copy the password to a secure location or choose **Send email** to email the login instructions to yourself.

Attach Managed Policies to an Existing IAM User

If you already have an IAM user, you can attach the **IAMFullAccess** and **AWSIQFullAccess** managed policies to an existing user by following this procedure.

1. Sign in to the IAM console at <https://console.aws.amazon.com/iam/>.
2. Choose **Users**.
3. Choose the user name to see the summary page for the user.
4. Choose **Add permissions**.
5. Choose **Attach existing policies directly**.
6. Choose both **IAMFullAccess** and **AWSIQFullAccess** from the list of policy names.

If you don't see them on the first page, you can filter the policies or search for them using the console.

7. Choose **Next: Review**.
8. Choose **Add permissions**.

For more information, see [Adding and Removing IAM Identity Permissions](#) in the *AWS Identity and Access Management User Guide*.

Working with Proposals in AWS IQ

To formalize an agreement with a customer in AWS IQ, create a proposal. The proposal can include details about the work to be performed, the project milestones, the timeline for payments, and any additional terms. The proposal also includes the maximum dollar amount. Customers review and accept proposals in the AWS IQ console.

You can withdraw a proposal, or a customer can decline a proposal if more work is needed. You and the customer can discuss what changes are needed through a chat session or a call, and then you submit a new proposal for approval.

Note

AWS IQ does not support modifying a proposal after it is created.

Create a Proposal

Create a proposal in the AWS IQ console after you have enough information to understand a customer request. If you need more information before proceeding, chat with the customer or set up a call to discuss the details.

To Create a Proposal

1. Sign in to the AWS IQ console at <https://iq.aws.amazon.com/>.
2. On the **Requests** page, choose **Responded**.
3. Choose the customer request for which you are creating the proposal.
4. Choose **Create** in the **Proposals** pane.
5. Specify a total amount for the proposal.

You cannot create a payment request that exceeds this amount without creating additional proposals.

6. Describe what you will deliver to the customer. Include the terms for this project, milestones, payment schedule for payment requests, and any necessary additions to the Engagement Agreement.

Limited markdown styling is supported (see the *Markdown Guide* below).

7. When you are finished writing your proposal, choose **Send**.

The customer will receive the proposal and accept or decline it.

Markdown Guide

You can format the text in your proposal using the following markdown styles.

Formatting	Markdown	Display
Bold text	**Apples**	Apples
Italic text	<i>*Apples*</i> or <u>_Apples_</u>	<i>Apples</i>

Formatting	Markdown	Display
Hyperlinks	<code>[Amazon](https://smile.amazon.com)</code>	Amazon
Bulleted lists	<pre>* Apples * Oranges * Pears</pre>	<ul style="list-style-type: none">• Apples• Oranges• Pears
Numbered lists	<pre>1. Apples 2. Oranges 3. Pears</pre>	<ol style="list-style-type: none">1. Apples2. Oranges3. Pears

Working with Permissions Requests in AWS IQ

After you and a customer agree on a proposal, request access to the customer's account, if necessary to complete the work. This topic explains how to create such a request.

The following permissions policies are available in AWS IQ. You can include details about why you are requesting that level of permissions.

Tip

It is an AWS security best practice to grant the least amount of privileges necessary to perform a task.

Prerequisite

- You need an accepted proposal from a customer.

Learn more about [Working with Proposals in AWS IQ \(p. 9\)](#).

Create a Permissions Request

You create a permissions request using the AWS IQ console.

1. Sign in to the AWS IQ console at <https://iq.aws.amazon.com/>.
2. On the **Requests** page, choose **Responded**.
3. Choose the customer request for which you are creating the permission request.
4. Choose **Request Permission** in the **Proposals** pane under the accepted proposal.
5. Choose the **Permission policy** you will need to perform the work.
6. Optionally, explain why this role is appropriate for your project in the **Description** field.
7. Choose **Request**.

The customer will receive the request and accept or decline it.

Note

The customer will be able to review AWS CloudTrail logs of your activity in their account. The customer can revoke access at any time.

Permission Levels in AWS IQ

The following IAM managed policies for job functions are available in AWS IQ:

AdministratorAccess

Provides full access to AWS services and resources. For more information, see [AWS Managed Policies for Job Functions](#) in the *AWS Identity and Access Management (IAM) User Guide*.

Billing

Provides full access to billing and cost management. This includes viewing account usage and viewing and modifying budgets and payment methods. For more information, see [AWS Managed Policies for Job Functions](#) in the *IAM User Guide*.

DatabaseAdministrator

Provides full access to AWS services and actions required to set up and configure AWS database services. For more information, see [AWS Managed Policies for Job Functions](#) in the *IAM User Guide*.

NetworkAdministrator

Provides full access to AWS services and actions required to set up and configure AWS network resources. For more information, see [AWS Managed Policies for Job Functions](#) in the *IAM User Guide*.

PowerUserAccess

Provides full access to AWS services and resources, but does not allow management of Users and groups. For more information, see [AWS Managed Policies for Job Functions](#) in the *IAM User Guide*.

SecurityAudit

Provides full access to read security configuration metadata. It is useful for software that audits the configuration of an AWS account. For more information, see [AWS Managed Policies for Job Functions](#) in the *IAM User Guide*.

SupportUser

Provides full access to troubleshoot and resolve issues in an AWS account. This policy also enables the user to contact AWS support to create and manage cases. For more information, see [AWS Managed Policies for Job Functions](#) in the *IAM User Guide*.

SystemAdministrator

Provides full access to resources required for application and development operations. For more information, see [AWS Managed Policies for Job Functions](#) in the *IAM User Guide*.

ViewOnlyAccess

Provides full access to view resources and basic metadata across all AWS services. For more information, see [AWS Managed Policies for Job Functions](#) in the *IAM User Guide*.

Working with Payment Requests in AWS IQ

In AWS IQ, you request payment after completing work. This topic leads you through making a payment request.

Prerequisites

- An accepted proposal from a customer.

Learn more about [Working with Proposals in AWS IQ](#) (p. 9).

Create a Payment Request

1. Sign in to the AWS IQ console at <https://iq.aws.amazon.com/>.
2. On the **Requests** page, choose **Responded**.
3. Choose the customer request for which you are creating the payment request.
4. Choose **Request Payment** in the **Proposals** pane under the accepted proposal.
5. Specify the amount you are requesting at this time, for this proposal **Requested payment amount**.

Your payment request cannot exceed the **Amount remaining**.

6. Describe what you delivered to the customer in the **Description of work delivered** field. Tell the customer about the work associated with this payment request. Refer back to the proposal if needed.
7. If this is your final request, choose **Final payment request**.

Checking this box concludes the associated proposal. If you check the box, you can't submit additional payment requests for this project.

8. Choose **Request**.

Processing Refunds in AWS IQ

Customers review work before approving a payment request. After approving a payment request, if a customer is unhappy with the work, they can request a refund. You can issue the refund, or not, at your sole discretion.

To initiate a refund request, open a ticket with AWS Marketplace Customer Service:

1. Gather the following information:
 - The customer's AWS account ID for the account used to post the IQ request. You can get this directly from the customer.
 - Accepted Payment Request date. This is the date the customer accepted the payment request; it's recorded in the IQ chat under the proposal tab.
 - Payment Request ID. This is also located in the IQ chat under the proposal tab.
 - Full Refund or Partial Refund. If Partial, provide the refund amount.
2. Navigate to the Support Console:
 - a. Choose **Account and billing support**.
 - b. From the **Type** dropdown, choose **IQ**.
 - c. Choose **I am an AWS expert and need assistance**.
3. In the subject line, enter "AWS IQ Refund Request."
4. Fill out the case details.
 - Customer AWS Account ID
 - Payment Approved Date
 - Payment Request ID
 - Refund Type (Full/Partial)
 - Refund Amount (if Partial)
 - Refund Reason
5. Submit the case to notify the Support team. A case is created in the AWS Support Center Console with status information on the refund request. The subject line will contain one of the following:

Completed: The refund was processed and no further action is required.

Pending: The refund will be processed once the current billing cycle ends.

Action Required: The request could not be processed, and we need additional information from you. You can respond directly to the support case, however you will also need to submit a new refund request form.

Document History for AWS IQ Experts User Guide

The following table describes the documentation for this release of AWS IQ.

- **API version:** latest
- **Latest documentation update:** November 13, 2020

update-history-change	update-history-description	update-history-date
Processing Refunds (p. 15)	Your customers can request refunds for work they have approved for payment. Issuing a refund is your discretion.	November 13, 2020

AWS glossary

For the latest AWS terminology, see the [AWS glossary](#) in the *AWS General Reference*.