



Sales Guide

AWS Partner Central



AWS Partner Central: Sales Guide

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What Is ACE Pipeline Manager?

The AWS Partner Customer Engagements (ACE) Pipeline Manager is an exclusive benefit for participating AWS Partners in the [AWS Partner 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

This section describes what you must do before using the ACE Pipeline Manager, and its main features, accessible from the **Sell** menu in AWS Partner Central.

Topics

- [ACE terms and conditions](#)
- [Permissions](#)
- [APN Customer Engagements Program eligibility](#)

ACE terms and conditions

Prior to participating in the ACE program, the Alliance Lead in your organization must sign in to AWS Partner Central and accept the ACE terms and conditions.

To accept ACE terms and conditions

1. Sign in to [AWS Partner Central](#) as a user with the alliance lead role.
2. Choose **Sell** in the top menu bar.
3. Read the terms and conditions and choose **Accept**.

Note

After accepting the terms and conditions, only the alliance lead can access ACE Pipeline Manager. The alliance lead can assign permissions to ACE Pipeline Manager to other AWS Partner Central users. For more information, refer to [Permissions](#)

To refer to the ACE terms and conditions

1. In AWS Partner Central, in the **AWS Partner Path** section, choose **View Scorecard**.
2. Choose **Additional Details**.
3. Choose **ACE Program Terms Acceptance Date**.

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 AWS Partner Central users.

The alliance lead or an alliance team user can assign ACE user or ACE manager permissions. 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 AWS Partner Central account. To enable new users to create a AWS Partner Central account, direct them to [Sign up for APN](#).

To grant the ACE user or ACE manager roles

1. Sign in to [AWS Partner Central](#) as a user with the Alliance Lead or Alliance Team role.
2. Choose **My Company, User Management**.
3. Choose **Manage ACE Pipeline Manager Users**.
4. Choose a user from the **Available users** list.
5. Choose **Make ACE user** or **Make ACE manager**.
6. On the **Update User Role** dialog box, choose **OK**.

APN Customer Engagements Program eligibility

For requirements for AWS Partners to be able to receive leads and opportunities, refer to [APN Customer Engagements](#).

Leads

On **Leads** tab of the ACE Pipeline Manager, you can accept and update leads and convert leads to opportunities.

Topics

- [Accessing leads](#)
- [Lead status](#)
- [Accepting a lead](#)
- [Updating a lead](#)
- [Converting a lead to an opportunity](#)
- [Exporting the current lead view](#)
- [Transferring lead ownership](#)

Accessing leads

1. Sign in to [AWS Partner Central](#).
2. From the top menu bar, choose **Sell, Leads Management**. On the **ACE Pipeline Manager** page, the **Leads** tab is where you to accept, manage, and report back updates on lead engagements shared by AWS and convert lead engagements to opportunities.

Note

Only Alliance leads can view AWS Partner Solutions Finder leads. Users with the alliance lead, alliance team, and ACE manager roles receive automated messages when a lead is generated through their AWS Partner Solutions Finder listing.

Lead status

Leads can have the following status:

Lead status	Description
Open	The lead was 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 engaged with prospect/end customer to discuss viability, understand requirements, etc. Prospect/end customer agreed the opportunity is real, of interest, and may solve a business or technical need.
Disqualified	Lead cannot be tied to an opportunity.

Accepting a lead

AWS Partners have the option to either accept or reject incoming lead engagements. You must accept an incoming lead before you can view all lead details including contact information.

1. On the **Leads** tab, for **All Customer Engagements**, choose **Leads Pending Acceptance**.
2. Choose the row of the lead you want to accept.
3. In the **Action** column, choose **Accept**.

Updating a lead

1. On the **Leads** tab, select the row of the lead you want to update.
2. In the **Action** column, choose **Update**.
3. On the **Leads detail** page, choose **Edit**.
4. Edit lead details and choose **Save**.

Converting a lead to an opportunity

On the **Leads** tab, you can convert qualified leads to opportunities to receive AWS validation and support.

1. On the **Leads** tab, select the row of the qualified lead you want to convert.
2. In the **Action** column, choose **Update**.
3. On the **Leads detail** page, choose **Convert**.
4. On the confirmation dialog, choose **OK**.
5. Complete the five steps of the **Create opportunity** form.
6. On the **Review and create** page, choose **Save & Submit**.
7. Choose **Back to Opportunity Dashboard**. On the **Opportunities** tab, the new opportunity displays with status of **Submitted**.

Exporting the current lead view

You can export the current lead view as a CSV file. On the **Leads** tab, choose **Bulk Actions, Export current lead view**.

Note

To view all available lead information, ensure that all leads are accepted. For more information, refer to [Accepting a lead](#).

Transferring lead ownership

Partner users can transfer ownership of leads in ACE Pipeline Manager to another active user in their partner organization that meets the following criteria:

- The user must have permissions to ACE Pipeline Manager. For more information, refer to [Permissions](#).
 - The user must have the alliance lead, alliance team, ACE manager, or ACE user role.
1. On the **Leads** tab, choose the lead you want to transfer.
 2. Choose **Bulk actions, Transfer lead**.
 3. Enter the name of the user you want to transfer to.
 4. Choose **Save**.

Note

To transfer leads in bulk, refer to [Bulk actions](#)

Opportunities

Opportunities can be added individually or by [bulk import](#). We encourage AWS Partners to 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 have complete view of opportunities. Individuals granted access to the ACE Pipeline Manager can view opportunities they submit.

Topics

- [AWS sales stages](#)
- [Creating a new opportunity](#)
- [Cloning opportunities](#)
- [AWS opportunity review process](#)
- [Accepting opportunities](#)
- [Updating next steps and opportunity stage](#)
- [Transferring opportunity ownership](#)
- [AWS stage visibility](#)
- [Opportunity contacts](#)
- [Contact roles](#)

AWS sales stages

Stage	Description
Prospect	Customer opportunity has been identified.
Qualified	You have engaged with the customer around the opportunity to discuss viability and understand requirements. The

Stage	Description
	customer has agreed that the opportunity is real, of interest, and may help with key business and technical needs.
Technical validation	The customer technically validates the solution using a combination of presentations, architecture design sessions with the system administrator (SA) and AWS Partner and other proof-of-concept activities.
Business validation	Business stakeholders have communicated their agreement on the financial viability of the solution.
Committed	The customer has agreed to the solution and commits to moving with technology, architecture, and economics.
Launched	Billing for the solution has begun.
Closed lost	The end customer selected another cloud provider or is not ready to move forward with the solution.

Creating a new opportunity

1. Sign in to [AWS Partner Central](#).
2. Choose **Sell, Opportunity Management**.
3. On the **Opportunities** page, choose **Create**.
4. Enter customer details and choose **Next**.
 - All fields are required except for **Customer DUNS**. Information such as the customer website and zip code are necessary to align the opportunity with internal stakeholders.
 - If you enter **Government** for **Industry Vertical**, ensure that you select a **Classified National Security Information** option.
5. Enter project details and choose **Next**.
 - Select **Co-Sell with AWS** if you want AWS Sales support. If you select **Co-Sell with AWS**, ensure that you choose one or more **Partner specific needs from AWS for Co-Sell** options.

- For **Opportunity Type**, if there are existing contracts between the end customer and partner with the potential for incremental revenue, choose **Expansion**. Choose **Flat Renewal** if no potential for incremental revenue exists. If you select **Expansion** or **Flat Renewal**, you can enter an optional parent opportunity ID.
 - AWS Training Partners (ATPs) should enter **Training** for **Use Case**, and enter AWS revenue from AWS training kits for **Estimated AWS Monthly Recurring Revenue**.
 - Enter a future date for **Target Close Date**. Do not submit opportunities with **Launched** or **Closed Won** status.
 - If you select **Yes: Sourced from marketing activity**, ensure that you select **Yes** or **No** for **Marketing development funds**.
6. Enter optional details as desired and choose **Next**.>
 7. Enter optional customer contact details and choose **Next**. For more information, refer to [Contact roles](#).
 8. Review the opportunity details and choose **Save & Submit**.

Cloning opportunities

You can start creating a new opportunity by cloning any existing opportunity that is not in draft status.

1. On the **Opportunities** page, choose the **Opportunity ID** of the opportunity you want to clone.
2. On the opportunity detail page, choose **Clone**.
3. Edit the information as necessary to create the new opportunity.
4. Review the opportunity details and choose **Save & Submit**.

Note

If you receive an data-entry error message, you can edit and resubmit the opportunity.

AWS opportunity review process

AWS conducts an initial review of submitted opportunities, and may require additional information from the AWS Partner, according to the ACE Terms and Conditions. Users with the alliance lead, alliance team, ACE manager, and ACE user roles receive email notifications if additional information is required for a secondary review. In ACE Pipeline Manager, **Action required** displays in the **Status** column for opportunities that require more information.

To update an opportunity with **Action required** status

1. Sign in to [AWS Partner Central](#).
2. Choose **Sell, Opportunity Management**.
3. In the **Opportunities** section, choose **Filter**.
4. On the **Filter** page, choose **Action required**.
5. Choose **Apply**.
6. Choose the row of the **Action required** opportunity you want to update.
7. Choose the **Opportunity ID**.
8. On the opportunity details page, review the remarks from the ACE Validation team in the **APN Review Reason** notification.
9. Choose **Edit**.
10. Make the required changes and choose **Save**.
11. Choose **Submit**.

Accepting opportunities

ACE eligible AWS Partners can receive AWS Opportunity Referrals. 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 can access all shared opportunities.

Note

You must accept an opportunity within 5 business days or it will be removed from your view in the ACE Pipeline Manager. To view opportunity details prior to accepting it, on the **Opportunities** page, choose the **Opportunity ID**.

Before you accept an opportunity, you only have access to the following fields:

- **Customer company fields** – End User (Company Name), End User Website, Country, Postal Code, Industry Vertical.
- **Opportunity fields** – 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** – Name and email of AWS Sales Rep, AWS Account Owner, Partner Success Manager/ISV Success Manager, Partner Development Manager/Partner Development Representative, WWPS PDM.

To accept an opportunity

1. On the **Opportunities** page, for **All Opportunities**, choose **Opportunities Pending Acceptance**.
2. Select the checkbox of the opportunity you want to accept.
3. Choose **Accept**.

Updating next steps and opportunity stage

We recommend that AWS Partners update opportunities with AWS Sales visibility with next steps at each stage change.

To add next steps

1. On the **Opportunities** page, choose the row of the validated opportunity you want to update. Validated opportunities have a status of **Approved**.
2. Choose **Opportunity ID**.
3. On the opportunity details page, under **Next Steps**, choose **Add next step**.
4. On the **Next Steps** page, enter a comment of up to 255 characters.
5. Choose **Save**.

To update opportunity stage

1. On the **Opportunities** page, choose the row of the validated opportunity you want to update. Validated opportunities have a status of **Approved**.
2. Choose **Opportunity ID**.
3. On the opportunity details page, choose a stage from the **Change Stage** dropdown list.

Transferring opportunity ownership

Partner users can transfer ownership of opportunities in ACE Pipeline Manager to another active user in their partner organization that meets the following criteria:

- The user must have permissions to ACE Pipeline Manager. For more information, refer to [Permissions](#).
- The user must have the Alliance Lead, Alliance Team, ACE Manager, or ACE User role.

1. On the **Opportunities** page, choose the opportunity you want to transfer.
2. Choose **Bulk actions, Transfer Opportunities**.
3. Enter the name of the user you want to transfer to.
4. Choose **Transfer**.

Note

To transfer opportunities in bulk, refer to [Bulk actions](#).

AWS stage visibility

When an opportunity has reached its terminal stage (status Launched or Closed/Lost), the AWS Partner must complete the following:

1. Update the opportunity close date.
2. Enter an AWS account ID if applicable.
3. Update the opportunity stage.

If the AWS seller updates an opportunity to a terminal stage in their CRM (customer relationship management) program, three new fields will appear for the opportunity in ACE Pipeline Manager:

- **AWS Stage**
- **AWS Close Date**
- **AWS Closed/Lost Reason**

To view AWS Stage, AWS Close Date, AWS Closed/Lost Reason fields

1. On the **Opportunities** page, click the opportunity ID of the validated opportunity you want to update. Validated opportunities have a status of Approved.
2. Choose the **Additional Details** tab.

Edits to **AWS Close Date** on the **Additional details** tab do not affect the **Target Close Date** on the **Project details** tab. Edits to **AWS Stage** on the **Additional details** tab do not affect **Stage** in the **Overview** section on the opportunity detail page.

Opportunity contacts

You can view the AWS contacts for any validated opportunity in the ACE Pipeline Manager.

To view opportunity contacts

1. On the **Opportunities** page, choose the row of the validated opportunity you want to update. Validated opportunities have a status of Approved.
2. Choose **Update** or the **Customer Company Name**.
3. Choose the **Contacts** tab.

Contact roles

The following table shows the names and roles of contacts in an opportunity.

Contact name	Role
AWS Sales representative	The primary contact from AWS Sales on an opportunity.
AWS Partner sales contact	The primary contact from your organization for an opportunity. AWS Sales may reach out to this contact regarding the opportunity.
AWS account manager	The AWS account manager for the customer on an opportunity.
Partner Development Manager (PDM)	The primary AWS contact for AWS Partners. Partner Development Managers (PDMs) help AWS Partners through their AWS Partner journey and serves as the key resource.
Worldwide Public Sector Partner Development Manager (WWPS PDM)	The primary AWS contact for AWS Partners working on a public-sector opportunity. Worldwide Public Sector Partner Development Managers (WWPS PDMs) help AWS Partners through their AWS Partner journey for public-sector competencies.
AWS Partner Success Manager (PSM)	AWS Partner Success Manager (PSM) connect AWS Sales teams directly to AWS Partners. They are experts on AWS Partner solutions and help drive AWS Partner go-to-market strategies.
AWS Independent Software Vendor Success Manager (ISM)	AWS Independent Software Vendor Success Managers (ISMs) help co-sell with AWS. They assist with sales pipeline reviews, sales

Contact name	Role
	enablement, lead generation, and lead management.

List views and column picker

Use list views and column pickers on the **Leads** and **Opportunities** tabs to customize displays.

Topics

- [List views](#)
- [Column picker](#)

List views

By default, **All Customer Engagements** display for leads and **All Opportunities** display for opportunities. Choose the **All Customer Engagements** or **All Opportunities** list-view picker to choose other preset list views. In addition to preset list views, you can create custom list views for leads and opportunities that include your choice of filters.

Lead list views

Label	Description
Leads pending acceptance	Leads shared by AWS that haven't been accepted or rejected.
Open leads	Leads in status <i>Open</i> that have been accepted.
Qualified leads	Leads in status <i>Qualified</i> .
Disqualified leads	Leads in status <i>Disqualified</i> .
Leads in research	Leads in status <i>Research</i> .
Flagged leads	Leads you 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 (for example, service webinars).

Label	Description
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 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 <i>Launched</i> or <i>Closed Lost</i>).
Committed opportunities	All opportunities you've created or were shared by AWS that are in stage <i>Committed</i> .
Closing this month	All opportunities you've created that have a close date this month.
Launched opportunities	All opportunities you've created or were shared by AWS that are in stage <i>Launched</i> .
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 flagged for follow-up.
Shared by AWS in the last 7 days	Opportunities shared by AWS in the last 7 days.

Label	Description
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 2 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.

Creating a custom list view

1. On the **Leads** or **Opportunities** tabs of ACE Pipeline Manager, choose the list view picker.
2. Choose Create new view.
3. On the **Create new view** page, enter a **View Name**.
4. To add a filter, choose a **Field**, complete the filter parameters, and choose **Add filter**. AWS Partners can add multiple filters.
5. Choose **Save**.

To edit a custom lead list view

1. On the **Leads** or **Opportunities** tab, choose the list view you want to edit.
2. Choose the list view name.
3. Choose **Edit View**.
4. Edit the view name and filters as necessary.
5. Choose **Save**.

To delete a custom lead list view

1. On the **Leads** or **Opportunities** tab, choose the list view you want to edit.
2. Choose the list view name.
3. Choose **Delete View**.

To edit a custom opportunity list view

1. On the **Leads** or **Opportunities** tab, choose the list view you want to edit.
2. To the left of the settings icon, choose the **Edit view** icon.
3. Edit the view name and filters as necessary.
4. Choose **Save**.

To delete a custom opportunity list view

1. On the **Leads** or **Opportunities** tab, choose the list view you want to delete.
2. On the ACE Pipeline Manager, choose the table icon.

3. Choose **Delete View**.

Column picker

Choose the **Column Picker** gear icon on the **Leads** or **Opportunities** tabs to select the columns you want displayed in the list.

Bulk actions

1. To upload opportunities in bulk, choose the drop-down list for **Bulk Actions** and select **Import Opportunities**. Partners are prompted with an overview of the key steps involved.
2. Choose **Start Import**. Users must complete the following **Download and Prepare CSV file for import** steps prior to uploading files:
 - **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.
 - **New changes:** Check the new section "Products and Offerings" for guidance on how to attach products and offerings on opportunities. Download the dynamic sheet to check the APN Product Codes and Offering IDs to add on the bulk excel template.
 - **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 drop-down lists where you can review and choose required fields.
 - **Additional columns are required if you select certain options:** Additional columns are highlighted in the Excel file and listed in the table.
3. Choose **Next**.
4. When your Excel template is ready, choose **Select File**, select your saved .csv file, and then choose **Upload**. If you receive an error message while resolving any missing fields, refer to the accompanying tables in this section.
5. Choose **Import** to continue, and then wait for the confirmation message. If you receive an error message, review the section **Errors in the bulk upload**.
6. Choose **Done**, and close bulk import to return to the ACE Pipeline Manager.

Fields

Field name (required)	Description
Customer/company name	<ul style="list-style-type: none"> • Name can be 80 characters maximum.
Industry vertical (<i>pick-list value</i>)	Customer company name:

Field name (required)	Description
	<ul style="list-style-type: none"> • Choose an industry vertical from the pick list. If you copy data from another file, paste it as text. • Needs to map to valid selection. Refer to Values sheet containing mapping. • Industry Other (required if industry vertical is Other) (column C). • Required field when Industry Vertical selected is Other. • 255 characters maximum. • <i>Government</i> requires the following: Does opportunity belong to NatSec? (column D)
Country (<i>pick-list value</i>)	<p>Required conditional fields:</p> <ul style="list-style-type: none"> • Needs to map to valid selection. Refer to the Values sheet for mapping. • If you copy data from another file, paste it as text. • State/province (pick-list value) (column F). • When country is set to <i>United States</i>, state/province (column F) is required.
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 starts with a zero, reformat the cell to as text. • Attention to the formatting according to each country. Refer to the values tab and follow the postal code format of the country selected. If your country does not have a postal code leave it blank.

Field name (required)	Description
Customer website	<ul style="list-style-type: none"> • Must be a valid domain. • No social media pages are allowed. • 255 characters maximum. • If the domain ends in <i>.co</i>, add a backslash (<i>/</i>) to the end (e.g., <i>www.domain.co</i>)
Partner primary need from AWS	<ul style="list-style-type: none"> • Required conditional field. • Must map to a valid selection. Refer to the Values sheet for mapping. • If you select <i>Co-Sell</i>, then Sales Activities is required (column W).
Partner project title	<ul style="list-style-type: none"> • Project title can be 60 characters maximum.
Customer business problem	<ul style="list-style-type: none"> • Describe the customer's pain point or business problem. The description must be 20 characters minimum.
Solution offered	<ul style="list-style-type: none"> • Describe the solution in 255 characters maximum. Enter the Offering ID for the solution. If you don't have an Offering ID, enter <i>Other</i>. If you enter <i>Other</i>, then Other Solution Offered is required (Column M).
Other Solution Offered	<ul style="list-style-type: none"> • Describe the solution in 255 characters maximum.
Use case (<i>pick-list value</i>)	<ul style="list-style-type: none"> • Must map to valid use case. Refer to the Values sheet for mapping. • If you copy data from another file, paste it as text.
Estimated AWS monthly recurring revenue	<ul style="list-style-type: none"> • Use only numbers and no special formatting. Remember to count revenues in dollars and use US decimal notation (<i>0,000.00</i>).

Field name (required)	Description
Target close date	<ul style="list-style-type: none"> • Future date must be in <i>mm/dd/yyyy</i> format. Update column formatting prior to and after saving the .csv file. • When formatting the column, don't use asterisks in the date format because it will respond to changes based on a user's location and operating system. Download a new template, transfer only its data, and format the target-launch date column using the steps in the next section.
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. Refer to the Values sheet for mapping. • If you copy data from another file, paste it as text.
Is opportunity from marketing activity? (required)	<ul style="list-style-type: none"> • Choose <i>Yes</i> or <i>No</i>. If you choose <i>Yes</i>, the following field is mandatory: Were marketing development funds used? (required if Is opportunity from marketing activity? is set to <i>Yes</i>) (Column U). • If you choose <i>Yes</i>, the following fields are also optional: <ul style="list-style-type: none"> • AWS Marketing Campaign (Column AK). • Marketing Activity Channel (Column AL). • Marketing Activity Use-Case (Column AM). • Must map to a valid selection. Refer to Values sheet for mapping.
Sales activities	Describes the customer's sales activities. This is required if Partner Primary Need from AWS (column I) is set to <i>Co-Sell</i> .
Competitive tracking (column AI)	If Competitive Tracking is set to <i>Other</i> , then Other Competitors (column AJ) is required.

Note

The **Secondary Required Fields** (highlighted black) are required:

1. If **Industry Vertical** is set to *Other*, the vertical must be specified in column C.
2. If **Industry Vertical** is set to *Government*, the following field is requested: **Does opportunity belong to NatSec?** (column D).
3. If **Country** is set to *United States*, then **State/province** is required (column F).
4. If **Solution offered** is set to *Other*, then **Other Solution Offered** is required (Column M).
5. If you Choose *Yes* for **Is Opportunity from Marketing Activity, Was Marketing Development Funds Used?** is required (column U).
6. If **Partner Primary Need From AWS** is set to *Co-Sell*, then specify **Sales Activities** in (column W).
7. If **Competitive Tracking** is set to *Other*, then you must specify it in column AJ.
8. If the Excel template contains a **Values** tab, you can use it to complete the additional columns.

Optional fields

Field name (required)	Description
AWS products (column X)	<ul style="list-style-type: none"> Add the AWS product code from the Excel file in step 1. If you have multiple IDs, separate each one with a semicolon (;).
Customer phone	<ul style="list-style-type: none"> Only numbers are allowed.
Customer email	<ul style="list-style-type: none"> Must be a valid email address.
AWS account ID	<ul style="list-style-type: none"> Must be a 12-digit number. If the ID starts with zero, reformat the cell as text.
Additional comments	<ul style="list-style-type: none"> 255 characters maximum.
State/province (<i>pick-list value</i>)	<ul style="list-style-type: none"> Required conditional field. State is a required field when country is set to United States. If you copy data from another file, paste it as text.

Field name (required)	Description
Street address and city	<ul style="list-style-type: none"> • 255 alphanumeric characters maximum (each).
Competitive tracking (<i>pick-list value</i>)	<ul style="list-style-type: none"> • Required conditional fields. • Must map to a valid use case. Refer to the Values sheet for mapping. • If Other Competitors (column AI) is selected, column AJ is required (255 characters maximum).
Marketing development funded (<i>pick-list value</i>)	<ul style="list-style-type: none"> • Must map to a valid use case. Refer to the Values sheet for mapping.
Primary sales contact, first name, last name, and title	<ul style="list-style-type: none"> • The contact referenced in this field is included in opportunity-related email notifications.
Primary contact phone	<ul style="list-style-type: none"> • Only numbers allowed.
Primary contact email	<ul style="list-style-type: none"> • Must be a valid email address.
Partner CRM unique identifier	<ul style="list-style-type: none"> • Ensure that the value is unique for each opportunity or leave this field blank so other users can save and submit records.

Export opportunities

The Bulk Export functionality allows a user to export up to 1,500 opportunities into a .csv file. AWS Opportunity referrals that have not been accepted will not appear in the export. To generate a file with your opportunities, choose **Export Opportunities** from the bulk-import dropdown list.


Note

You will export all filtered opportunities in the currently selected view.

Update opportunities


The bulk-update function can export validated opportunities in bulk. This feature is designed to be scalable and to provide visibility of each engagement.

1. From the bulk-actions drop-down list, choose **Update Opportunities**.
2. Prepare the opportunities you want to update and download. Use filters to narrow the scope.
3. Choose **Next**.
4. Choose **Download Prepared XLS file** to generate and download your AWS opportunities. Acknowledge that there is a limit of 1,500 opportunities that can be downloaded.
5. Open the file in Excel, make any necessary changes, and save the file as a .csv.
6. Choose **Upload File**, choose your saved .csv file, and then choose **Update**. A popup window confirms the process status.
7. Confirm that you have prepared the .csv and are ready to upload it, and then choose **Next**.
8. Choose the file you prepared, and then choose **Upload CSV File**.
9. You will be redirected to the ACE Pipeline Manager.
10. When the bulk update completes, you will receive a notification.

 **Note**

To review your history of bulk updates and get detailed information, choose **Go to Bulk Updates**.

Transfer Lead and Opportunity Ownership

 **Note**

A notification confirming the transfer is sent to both the Partner Users who transfer and receive the list view.

For more information, refer to **List Views** and **Creating Custom List Views**.

1. Navigate to the view you want to transfer (for example, Choose the **Opportunities** tab if you want to transfer a custom list view for Opportunities and choose the **Leads** tab if you want to transfer a custom list view for Leads).
2. Choose the down arrow to reveal options to edit, transfer, and delete. If you are not in your custom view, choose the down arrow, and scroll to your desired view. To display further options, choose the vertical dots to the right of the desired view.

3. Choose either option to transfer the view.
4. Enter the first or last name to locate the partner user who you intend to receive the list view.

Note

Searching by only pasting an email may not identify the correct user. You can only transfer leads and opportunities to individuals who have been granted ACE Pipeline Manager User access.

5. Choose the partner user contact to confirm, and then choose **Save**.
6. When you receive a popup that confirms your transfer is complete, choose **Done**.
7. You will be redirected to the main ACE Pipeline Manager view where you can download a .csv of successful transfer and unsuccessful transfers.

To choose an opportunity list to transfer from Pipeline Manager

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). Users can transfer leads or opportunities without creating a custom view. Alliance Leads retain access to all opportunities even after a view is transferred.

Note

A notification that confirms the transfer is sent to both the partner users who transfer and receive 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

To transfer leads or opportunities

1. Choose **Bulk Transfer** from the **Bulk Actions** dropdown list.
2. The number of records being transferred is displayed.

Note

If you don't choose an opportunity, all opportunities in the list view are transferred. Ensure that the number matches the number of opportunities chosen so that you don't unintentionally transfer a large number of opportunities.

3. Search for the user you want to transfer the opportunities to, and choose **Transfer**. The partner must enter the name of an active user within their partner organization in which they want to transfer opportunities. You can be in any of the following roles: alliance lead, alliance team, ACE manager, or ACE user.
4. You are redirected to the ACE Pipeline Manager and receive a notification with the result of the transfer. Any opportunities that didn't transfer remain in the original owner's name.
5. Choose any of the buttons to download the opportunity transfer logs.
6. The error log provides the opportunity ID and reason for the failed transfer.

Search

Use the search bar on the **Leads** and **Opportunities** tabs to find records in the current list view. To search all records, ensure that you choose a list view that includes all records before searching. For more information about list views, refer to [List views](#).

Document history for the AWS Partner Central Sales Guide

The following table describes the documentation releases for AWS Partner Central Documentation.

Change	Description	Date
First release	First release of the AWS Partner Central Sales Guide.	November 2, 2023