



Sales Guide

AWS Partner Central



AWS Partner Central: Sales Guide

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Getting started

The [AWS Partner Customer Engagements Program](#) provides the framework to enable AWS Partners to drive successful Customer engagements on AWS, whether the engagement originates from AWS Partners via submission through the ACE Opportunities, ACE Leads, or generated by AWS.

This section describes what you must do before using the ACE Opportunities and Leads features, accessible from the **Sell** menu in AWS Partner Central. For requirements for AWS Partners to be able to receive leads and opportunities, refer to [AWS Partner Customer Engagements](#).

During registration for AWS Partner Central, the individual completing the registration processes acknowledged and agreed to the [APN Customer Engagement Program terms and conditions](#).

Note

To create, view, edit or manage Leads and Opportunities, a user must be assigned the appropriate permissions in AWS IAM. For more information, see [Accessing Partner Central](#).

Receiving leads shared by AWS

The Leads page allows you to accept, manage, and report back updates on lead engagements shared by AWS and convert those lead engagements to opportunities. The Leads page has two tabs:

- **Leads** – where you can manage and convert accepted leads
- **Lead invitations** – where you can accept or reject leads shared with you

AWS Partners have the option to either **Accept** or **Reject** incoming lead invitations. 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 **Lead Invitations** tab.

For lead management, partners can review, accept, or reject leads shared by AWS within a 5-business-day window. Leads progress through defined statuses and include essential information such as company details, use cases, and project descriptions. Once qualified, leads can be converted into full opportunities for further development.

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. From the **Lead Invitations** Tab, click on one or multiple leads using the checkbox and select **accept invitation** or You can also click on any lead invitation and select **Accept invitation** on the top right corner.
2. Once clicked, you will see a pop up appear to confirm acceptance.
3. A banner will appear informing of the successful acceptance.

Updating a lead

1. Navigate to any lead using the checkbox or clicking on the lead.
2. Select **Edit**.
3. Make relevant updates and select **Save**. You can also add interactions to the lead to record contact between a partner and the potential customer to help track engagement with leads across different channels and touchpoints.

Converting a lead to an opportunity

Once a lead reaches the Qualified stage, partners can convert it into an opportunity, maintaining the historical connection between the lead and the resulting opportunity.

To convert a lead to an opportunity

1. Navigate to desired lead and click **create draft opportunity**.
2. Choose **Create draft opportunity** which is automatically generate a new opportunity with relevant lead information pre-populated.
3. Choose **View draft opportunity**.
4. Add any additional required opportunity information.
5. Choose **Submit** to submit for validation.

Note

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

Managing Opportunities

Partners can create and share opportunities with AWS, or receive opportunities shared by AWS for co-selling. The topics below describe how to manage opportunities jointly with AWS through the sales lifecycle.

AWS sales stages

Partners can share and receive opportunities to collaborate on with AWS. These opportunities progress through various stages of the sales cycle, which represents a specific phase in the sales process and indicates how close a deal is to closing. Opportunities move through the following stages:

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

Opportunities can be added individually, by [bulk import](#) or managed through a [CRM integration](#). 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 higher.

Opportunities can be classified as requiring AWS support or partners can choose to manage their opportunities independently. Opportunities progress through defined stages from Prospect to Launched/Closed and include data attributes such as revenue estimates, customer details and customer use case.

Partners can share opportunities with AWS sellers, which are routed through an internal validation process. Once an opportunity has been submitted, it undergoes validation to ensure it meets AWS criteria for deal size, solution alignment, and customer engagement status.

Partners can now use deal sizing when creating opportunities to receive AI-powered Monthly Recurring Revenue (MRR) forecasts and AWS product recommendations based on opportunity details. Partners can also import AWS Pricing Calculator URLs to automatically populate service selections and receive enhanced insights including Migration Acceleration Program (MAP) eligibility indicators and optimization recommendations.

Create an opportunity

1. Navigate to **Sell, Opportunities** in the left-side navigation.
2. Choose **Create opportunity**.
3. 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**, make sure you select a **Classified National Security Information** option.
4. Enter project details and choose **Next**.
 - Select **Co-Sell with AWS** if you want AWS Sales support. If you select **Co-Sell with AWS**, make sure 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** on the next step as part of deal sizing.
- 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**, make sure you select **Yes** or **No** for **Marketing development funds**.

5. Enter APN program details and choose **Next**.

Select the **APN program** related to this opportunity. Some APN programs may require additional details and adding contact details.

If you select **Migration Acceleration Program**, you can provide additional details about your migration project.

- Select **Migration workload** you plan to migrate.
- Select **Migration source** as the platform or environment where your workload currently resides.
- Select **Migration phase** as your current stage in the migration journey: **Assess, Mobilize, Migrate & Modernize, and Manage**.
- Select **Managed services offered to customer** as **Yes**, if you plan to help the customer manage workloads by offering managed services after the project is delivered. Select **No**, if you do not plan to offer managed services to the customer after the project is delivered.
- Enter **Migration details** about your migration project, including: current environment specifications, business drivers for migration, expected outcomes, and key challenges or requirements etc.

6. Configure deal size and choose **Next**.

Deal sizing provides AI-powered insights to help you estimate opportunity value and identify relevant AWS products. You can choose between two calculation methods based on your preference and available information.

Choose your MRR calculation method:

- **Manual entry with AI insights** – View AI-forecasted MRR estimates and AWS product recommendations based on your opportunity details, then enter your own MRR estimate. This method allows you to review AI forecasts while maintaining control over the final estimate.
- **Pricing Calculator URL** – Import an AWS Pricing Calculator URL to automatically populate MRR and product selections. This method provides enhanced insights including MAP eligibility indicators, optimization recommendations, and potential cost savings analysis.

Using Manual entry with AI insights

When you select Manual entry with AI insights, the system analyzes your opportunity details to provide recommendations.

Note

AI-forecasted MRR and product recommendations are available for opportunities in Prospect, Qualified, Technical Validation, and Business Validation stages. These features are not available for opportunities in Committed, Launched, or Closed Lost stages.

1. **AI-forecasted MRR:**

- We provide an estimate of the median monthly recurring revenue (MRR) based on your past AWS opportunities and current opportunity details, including the Customer business problem field.
- Review the AI-forecasted MRR using your judgment and knowledge of the opportunity to assess its accuracy independently. Update the estimate as you gather more information about the deal and progress through the sales cycle.

2. **AWS product recommendations:**

AWS products with a purple badge are AI-recommended based on your Customer business problem and opportunity details. We analyze your customer's technical requirements and typical use cases.

Review these suggestions and customize the product selection to match your customer's specific needs.

To refine your selection:

- Search for and add additional AWS products to associate with your opportunity.
- Uncheck products in the AWS products table.
- Remove products from the Selected AWS products list.

Using Pricing Calculator URL

When you select Pricing Calculator URL, you can import estimates directly from the AWS Pricing Calculator.

1. Import your Pricing Calculator URL:

- Copy the share URL from your AWS Pricing Calculator estimate.
- Paste the URL into the **Estimate URL** field.
- Choose **Calculate MRR** to import the estimate.
- The **Total MRR** automatically populates based on the imported calculation.

2. Review URL-imported products:

- All products from your Pricing Calculator estimate are automatically included in your opportunity.
- The products table displays detailed information for each imported product, including MRR amount, optimized spend, potential savings, and recommendations.
- Review potential savings calculations to quantify cost optimization opportunities.
- Review optimization recommendations to understand how to improve cost efficiency. Recommendations appear in the **Recommendation** column with specific guidance such as "Use Reserved Instances or Savings Plans."
- Review MAP eligibility indicators to identify products that qualify for Migration Acceleration Program funding. Eligible products display an "Eligible" status in the **MAP eligible** column.
- Modernization options display an "Eligible" status in the **Modernization** column.

3. **Modify your estimate:**

- To modify products or pricing after importing, you must update your Pricing Calculator estimate URL and reimport.

7. Enter optional details as desired and choose **Next**.
8. Enter optional customer contact details and choose **Next**. For more information, refer to [Opportunity contacts](#).
9. Review the opportunity details and choose **Submit**.

Partners can add up to two (2) partner contacts on a given opportunity. These designated contacts serve as the primary points of communication with AWS sellers and receive all relevant notifications about the opportunity's progression. This includes automated alerts for status changes, requests for additional information, and validation updates.

Once the opportunity is accepted by AWS, partners can collaborate with assigned AWS sellers, access deal support resources, and receive guidance on technical validation and pricing assistance. See more details in the [Accepting opportunities](#) section.

Partners can utilize the natural-language search and filter capabilities to easily sort and find specific opportunities in both the **Opportunities** and **Opportunity invitations** tabs.

Note

See IAM guide for help with Access.

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 a data-entry error message, you can edit and resubmit the opportunity.

Using agents for opportunity insights

AWS Partner Central uses AI-powered capabilities to provide insights for your opportunities, including pipeline intelligence, customer profiles, tailored sales strategies, solution recommendations, next step recommendations, and automated opportunity progression.

Prerequisites

- Your account has migrated to AWS Partner Central in the AWS Management Console.
- Your IAM user or role has the required permissions:
 - `partnercentral:List*`
 - `partnercentral:Get*`
 - `partnercentral:UpdateOpportunity`
 - `partnercentral:SubmitOpportunity`
 - `partnercentral:AssignOpportunity`
 - `partnercentral:AssociateOpportunity`
 - `partnercentral:DisassociateOpportunity`
 - `partnercentral:StartEngagementFromOpportunityTask`
 - `partnercentral:UseSession`
 - `aws-marketplace:DescribeEntity`
 - `aws-marketplace:SearchAgreements`
 - `aws-marketplace:ListEntities`
- You have at least one active opportunity.

⚠ Important

Opportunity insights are generated by AI for informational purposes to help guide your sales activities. Insights do not guarantee accuracy or completeness. Partners should verify all AI-generated insights before using them in customer engagements.

Opportunity summary

When you open an opportunity details page, the agent automatically generates a summary at the top of the page. The summary synthesizes key details from the opportunity record, including company name, industry, opportunity stage, expected monthly AWS spend, target close date, and engagement type. This provides an at-a-glance view of the deal without scanning individual form fields.

Pipeline insights

The agent analyzes your open opportunities and surfaces what needs attention, including AWS stage, upcoming deadlines, and stalled deals. Instead of manually reviewing each opportunity, you can access a prioritized, actionable view of your pipeline.

To access pipeline insights

1. In the AWS Partner Central console, choose **Opportunities** from the left navigation to open the Opportunities listing page.
2. Choose **Ask about sales pipeline** at the top of the listing page.
3. A conversational panel opens where you can ask questions about your pipeline in natural language.

You can ask the agent about topics such as which opportunities need attention, pipeline health across stages, close date forecasts, patterns in lost opportunities, and overall deal velocity.


Customer profile

On each opportunity details page, the agent generates a company profile for the associated customer using publicly available data from third-party sources.

The profile includes:

Element	Description
Industry classification	The customer's primary industry and sub-industry.
Business model	B2B, B2C, or hybrid.
Geographic presence	Office locations and regional coverage.
Company size and market focus	Scale of operations and target market segments.
Recent developments	Notable business updates or announcements.

Choose **Show more** to view extended profile details. All profile content is labeled "Generated with publicly available data and AWS AI insights."

 **Note**

Customer profiles are generated using publicly available information and may not reflect the most current business developments. Partners should verify details independently before using them in customer engagements.

Sales play generation

The agent synthesizes everything known about the account and generates a tailored sales strategy on demand. You receive a tailored sales strategy built for the specific opportunity based on available data and AWS best practices.

To generate a sales play

1. On the opportunity details page, locate the **Opportunity Insights** panel.
2. Choose **Generate sales play**.
3. The agent produces a sales strategy combining the opportunity's details, the customer's industry context, and relevant AWS solution recommendations.

Solution recommendation

The agent matches your registered solutions against each opportunity's requirements, so you can see which solutions fit without manually cross-referencing your portfolio.

On the opportunity details page, the **Opportunity Insights** panel displays a **Solution Match** section. For each recommended solution, the agent shows:

Element	Description
Solution name	The name of the matching solution from your partner account.
Description	A summary of the solution's capabilities.

To view solution recommendations

1. On the opportunity details page, locate the **Opportunity Insights** panel.
2. Review the **Solution Match** section for recommended solutions.

You can also choose **Ask about this opportunity** and ask questions such as "Which of our solutions best match this opportunity?" or "Is our migration solution already attached to this deal?"

Next step recommendations

The agent doesn't just show you what stage a deal is in — it recommends your next step based on your opportunity data and AWS best practices for co-sell stage progression, so you always know your next best action.

To get next step recommendations

1. On the opportunity details page, choose **Ask about this opportunity**.
2. Choose **Give me next step recommendations** or type a similar request.
3. The agent compares the data on your opportunity against AWS stage progression criteria and identifies what information is still needed to move the deal forward.

Opportunity progression

When you are ready to advance an opportunity, the agent can help update the opportunity and progress it to the next stage.

To progress an opportunity

1. On the opportunity details page, choose **Ask about this opportunity**.
2. Choose **Help me progress this opportunity** or type a similar request.
3. The agent accepts supporting documents such as meeting transcripts, call notes, or email summaries. Upload the relevant document when prompted.
4. The agent extracts details from the document, maps them to the appropriate opportunity fields, and evaluates whether the opportunity meets all requirements for the next stage.
5. If all criteria are satisfied, the agent updates the opportunity fields and advances it to the next stage.
6. If gaps remain, the agent returns a breakdown of satisfied versus unsatisfied requirements with guidance on what is still needed.

Funding recommendations

The agent evaluates available co-sell funding programs against your opportunity in real time and surfaces the right options based on opportunity details and program eligibility criteria.

From the **Funding Recommendation** widget on the opportunity details page, you can view recommended programs, get estimated funding amounts, and create fund requests.

For more information, see [Using agents for funding recommendations and fund requests](#).

Important considerations

Consideration	Details
Data scope	The agent considers only opportunities you have submitted to ACE from your partner account. It does not access data from other partners or accounts.

Consideration	Details
Customer profiles	Generated from publicly available data via a third-party API. Not sourced from AWS or partner systems.
Permissions	Features are gated by IAM permissions. Users without required permissions receive an access denied message.

Related resources

- [Managing Opportunities](#)
- [Using agents for funding recommendations and fund requests](#)

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](#). If additional information is required for a secondary review, users with the alliance lead or opportunity contacts will receive email notifications. On the **Opportunities** page, **Action required** displays in the **Status** column for opportunities that require more information.

1. Sign in to [AWS Partner Central](#).
2. Choose **Sell, Opportunity**.
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 that 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 ([ACE Terms and Conditions defines ACE Eligibility](#)) AWS Partners can receive AWS Opportunity Referrals. These opportunities are generated by AWS where consent was captured to permit an AWS Partner to assist with their proposed solution or workload.

When AWS identifies a customer opportunity that aligns with a partner's capabilities, solutions, or expertise, they can share it directly through AWS Partner Central. These AWS-referred opportunities appear in the **Opportunity Invitations** tab, where partners have 5 business days to either accept or reject them. Once accepted, the opportunity moves into the **Opportunities** tab, where partners can manage all active opportunities.

Note

You must accept an opportunity within five business days or it will be removed from your view in the **Opportunity invitations** tab. To view opportunity details before accepting, 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. From the **Opportunity Invitations** Tab to view 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 Opportunity Page select the opportunity you want to accept and then click on **Accept Invitation**. You will be able to accept multiple opportunities.

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

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.

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) system, three new fields will populate for the opportunity:

- **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 Opportunity Page.

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.

Creating a collaboration channel on Slack

AWS Partners can request collaboration on select strategic, high-value opportunities that require AWS co-sell support. The eligible opportunity must be at the **Qualified** stage or higher. Once approved, the partner will receive an email notification with an invitation to join the designated Slack channel.

To submit a collaboration request:

1. Sign in to AWS Partner Central.
2. Choose **Sell** from the top navigation, and then choose **Opportunity Management**.

3. From **Opportunities**, choose the **Opportunity ID** to view details.
4. From the opportunity details page, choose the **Collaboration channels** tab.
5. Choose **Request a Slack channel**.
6. Select users to add to the channel, and then choose **Add to channel**.

Once you have submitted the request, you can view the channel's status and details, including invited partner contacts and their invitation status.

When a collaboration request is submitted, the AWS account manager for the opportunity is notified. The account manager then creates the Slack channel, adding the selected contacts and other relevant opportunity team members. Once the channel is created, an email invitation is sent to all invited parties.

To accept the invitation:

1. From the email invitation, choose **Get started**. Slack will open in your browser.
2. Select the organization associated with your invitation. The email you use for Slack must match the one used for your AWS Partner Central account.
3. Choose the Slack workspace that you'd like to use to join the channel.
4. Choose **Join channel**.

Opting out and leaving a channel:

- Partners can opt out of future Slack invitations by selecting **Opt-out of all invites** from the first pinned message in the channel.
- To leave a channel, choose the channel name in the conversation header to see channel information. Then, choose **Leave channel** from the channel options. Alternatively, you can choose **Leave channel** from the first pinned message.

Search and filter opportunities

Use the search bar on the Leads and Opportunities tabs to find records in the current list.

Use column pickers on the Leads and Opportunities tabs to customize displays. Choose the Column Picker gear icon on the Leads or Opportunities tabs to select the columns you want displayed in the list.

Tagging AWS partition for opportunities

Partners can now specify AWS partition details when creating or managing opportunities in AWS Partner Central in the console.

Create new opportunity

1. Navigate to **Create opportunity**.
2. In the second step **Add project details**, locate the AWS partition details section.
3. Select the AWS partition from the dropdown menu.
4. Continue with opportunity creation.

Edit existing opportunity

1. Open the opportunity you want to update.
2. Navigate to **Project details**.
3. Locate the AWS partition field.
4. Select **Edit** and choose the appropriate partition value.
5. Save your changes.

AWS updates

1. AWS updates will provide suggested values based on what your AWS contact suggests.
2. The system will show suggested values when the AWS input is different from your input.
3. Partners can simply locate the record with Property being AWS partition, select and click **Apply**.
4. The suggested value will be saved on the opportunity.

Bulk actions

Import opportunities

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 Opportunity page.

Opportunity fields

The following table describes the required fields for creating opportunities:

Fields

Field name (required)	Description
Customer/company name	Name can be 80 characters maximum.
Industry vertical (pick-list value)	Customer company name: <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.

Field name (required)	Description
	<ul style="list-style-type: none"> • Industry Other (required if industry vertical is Other) (column C). • Required field when Industry Vertical selected is Other. • 255 characters maximum. • Government requires the following: Does opportunity belong to NatSec? (column D)
Country (pick-list value)	<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 United States, 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.
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 .co, add a forward slash (/) to the end (e.g., www.domain.co/).

Field name (required)	Description
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 Co-Sell, then Sales Activities is required (column W).
Partner project title	Project title can be 60 characters maximum.
Customer business problem	Describe the customer's pain point or business problem. The description must be 20 characters minimum.
Solution offered	Describe the solution in 255 characters maximum. Enter the Offering ID for the solution. If you don't have an Offering ID, enter Other. If you enter Other, then Other Solution Offered is required (Column M).
Other Solution Offered	Describe the solution in 255 characters maximum.
Use case (pick-list value)	<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	Use only numbers and no special formatting. Remember to count revenues in dollars and use US decimal notation (0,000.00).
Target close date	<ul style="list-style-type: none"> • Future date must be in mm/dd/yyyy 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.

Field name (required)	Description
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 (pick-list value)	<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 Yes or No. If you choose Yes, the following field is mandatory: Were marketing development funds used? (required if Is opportunity from marketing activity? is set to Yes) (Column U). If you choose Yes, 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 Co-Sell.
Competitive tracking (column AI)	If Competitive Tracking is set to Other, then Other Competitors (column AJ) is required.

Secondary Required Fields

The Secondary Required Fields (highlighted black) are required:

- If Industry Vertical is set to Other, the vertical must be specified in column C.
- If Industry Vertical is set to Government, the following field is requested: Does opportunity belong to NatSec? (column D).
- 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

The following table describes the optional fields for creating opportunities:

Optional fields

Field name (optional)	Description
AWS products (column X)	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	Only numbers are allowed.
Customer email	Must be a valid email address.
AWS account ID	Must be a 12-digit number. If the ID starts with zero, reformat the cell as text.
Additional comments	255 characters maximum.
State/province (pick-list value)	<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.
Street address and city	255 alphanumeric characters maximum (each).
Competitive tracking (pick-list value)	<ul style="list-style-type: none"> • Required conditional fields. • Must map to a valid use case. Refer to the Values sheet for mapping.

Field name (optional)	Description
	<ul style="list-style-type: none"> If Other Competitors (column AI) is selected, column AJ is required (255 characters maximum).
Marketing development funded (pick-list value)	Must map to a valid use case. Refer to the Values sheet for mapping.
Primary sales contact, first name, last name, and title	The contact referenced in this field is included in opportunity-related email notifications.
Primary contact phone	Only numbers allowed.
Primary contact email	Must be a valid email address.
Partner CRM unique identifier	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 opportunities back to 2021.

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 Opportunity Page.
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**.

Discovering and managing partner connections

This section provides detailed instructions for the Partner Discovery and Partner Connections features in AWS Partner Central, helping AWS Partners discover, connect, and collaborate with other AWS Partners.

Getting started

To access these features:

1. Sign in to [AWS Partner Central](#).
2. From the left navigation panel, select either:
 - **Partner Discovery** if you want to search for new partners, review their profile details, or send them connection requests
 - **Partner Connections** to send connection invitations or manage active connections and connection requests

Partner Discovery

From Partner Discovery, you can find or search for other partners to view their details or send them connection requests.

Finding partners

You can search for partners using multiple criteria:

- **Partner name** - Search by the specific name of a partner organization
- **Keywords in description** - Find partners based on relevant terms in their company descriptions
- **Industry** - Filter by specific industry verticals
- **Location** - Search by country they do business in
- **Partner program** - Filter by AWS partner program participation
- **Partner type** - Search by partner classification (Consulting Partner, ISV, Reseller, Distributor)
- **Specialization** - Find partners with specific competencies or service designations

- **Solution type** - Filter by the types of solutions partners offer
- **Connection status** - View partners based on your current connection status with them

Using search filters

You can use one or multiple of these available filters to look for the correct partner. The search functionality allows you to:

1. Combine multiple filters for more precise results
2. Refine your search by adding or removing criteria

Reviewing partner profiles

After receiving results that satisfy your criteria, you can either:

- Click on the partner name to view their detailed profile, which includes:
 - Company description and overview
 - Industry focus and expertise areas
 - Partner program participation
 - Specializations
- Send a connection request directly from the search results

Best practices for Partner Discovery

When searching and connecting with other AWS Partners, consider the following:

- Use specific keywords to narrow your search results
- Review partner profiles thoroughly before sending connection requests
- Filter on Location to shortlist Partners in your desired regions
- Look for partners with relevant AWS competencies

Partner Connections

From Partner Connections, you can manage your existing partner connections and active incoming/outgoing connection requests.

Sending connection requests

When you find the right partner you want to connect with through Partner Discovery:

To send a connection request:

1. Select the partner from your search results.
2. Click the **Send connection request** button.
3. Complete the connection request form by specifying:
 - Your full name
 - Your contact email
 - A personalized message to the recipient explaining why you're requesting the connection

Viewing and managing connections

From Partner Connections, you can:

- **View all existing connections** - See your active partner relationships
- **Monitor incoming connection requests** - Review requests you've received from other partners within Connection Requests tab. Recipient Partner's Alliance Lead will also get an email when you get a connection request.
- **Monitor outgoing connection requests** - Track the status of requests you've sent
- **Take action on requests** - Accept, reject, or respond to connection requests from Connection Requests tab. Sender Partner's Alliance Lead will get an email when your connection request is accepted or rejected by a recipient.

Managing connections

Responding to connection requests

To manage incoming connection requests:

- Click on **Partner Connections** tab to view all the active connections
- Select **Connection Request** tab to view requests with pending response status

- If you want to accept a request - Select that request, which will establish a connection and enable collaboration opportunities, and accept the connection
- If you want to reject the request - Just decline it

Connection request statuses

Your connection requests can have the following statuses:

- **Pending response** - Waiting for the recipient to accept or reject
- **Cancelled** - Request was withdrawn before response
- **Rejected** - Request was declined by the recipient

Ending connections

If you decide to end a connection with your partner, you can do so at any time. Once you end the connection, you won't be able to share any new collaborative opportunities with them. However, don't worry about existing engagements - any opportunities that were shared while your connection was active will continue without any changes.

To end an connection:

1. Select the connection from **Partner Connections** tab.
2. Click on **End Connection** button.

Connection statuses

Your partner relationships will show one of these statuses:

- **Connected** - Active connection established, collaboration is possible
- **Not connected** - The connection was previously ended or never existed, collaboration is not possible

Collaboration requirements

Important

An existing connection is required to collaborate on multi-partner opportunities. Partners must maintain active connections to:

- Share opportunities
- Collaborate on joint proposals
- Participate in multi-partner engagements

Editing connection preferences

- Partners can manage their connection preferences. If a partner does not want their profile details to be discoverable on the Partner discovery page, they can change their partner profile visibility to 'Private'. For more information on creating and updating your partner profile, see [Managing your profiles](#).
- If partners choose to be discoverable on the discovery page, but do not want to enable receiving connection requests, they can update their Connection request preferences. Partners can also choose to exclude up to 50 specific partners from sending collaboration requests.

Best practices

For connection requests

- Personalize your connection messages
- Clearly explain the potential collaboration benefits
- Include specific use cases or opportunities
- Provide your contact information for follow-up

For managing connections

- Regularly review and maintain your partner network
- Respond promptly to incoming connection requests

- Keep your own partner profile updated and comprehensive
- End connections that are no longer relevant or active

Document history for the AWS Partner Central Sales Guide

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

Change	Description	Date
Feature launch of Migration Program Acceleration opportunities data enrichments	Added documentation for APN Programs with Migration Program Acceleration details.	January 30, 2026
Feature launch of Tagging AWS partition for opportunities	Added documentation for Tagging AWS partition for opportunities.	December 11, 2025
Feature release of deal sizing	Updated creating an opportunity documentation with deal sizing step.	December 8, 2025
AWS Partner Central console launch	Updated documentation for the launch of the new AWS Partner Central console with enhanced partner discovery , connection management, and opportunity collaboration features.	November 30, 2025
Feature release of multi-partner opportunities	Information added for sharing and accepting opportunities with multiple partners. Information added on connecting with other partners.	December 4, 2024
Feature release of Slack collaboration	Instructions added for slack collaboration channels.	November 1, 2024

[First release](#)

First release of the AWS
Partner Central Sales Guide.

November 2, 2023