



Sales Guide

# AWS Partner Central



# AWS Partner Central: Sales Guide

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# Getting started

AWS Partner Central enables AWS Partners to drive successful customer engagements on AWS using the [AWS Partner Customer Engagements Program](#), whether the engagement originates from AWS Partners via submission through Opportunities, Leads, or generated by AWS.

AWS Partner Central uses AI-powered agents to take action on your opportunities, including creating opportunities through conversation, recommending solutions and next steps, generating tailored sales plays, progressing opportunities through stages, and creating fund requests. The agents also surface pipeline intelligence and customer profiles to inform those actions.

This section describes what you must do before using the 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](#).

# Managing leads

The Leads page in AWS Partner Central allows you to manage your lead lifecycle: accept leads shared by AWS, import your own leads, enrich leads with AWS insights, report back updates, and convert leads into opportunities. The Leads page has three tabs:

- **Leads** – where you can enrich lead batches, manage leads, and convert leads to opportunities
- **Lead invitations** – where you can accept or reject leads shared with you by AWS
- **Enriched lead batches** – where you can review your enriched lead batches and enrichment results

## Lead status

Leads can have the following status:

| Lead status         | Description  |
|---------------------|--|
| <b>Unqualified</b>  | The default status for a new lead. The partner has not yet assessed whether the lead can be tied to a viable opportunity.  |
| <b>Qualified</b>    | 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. |
| <b>Disqualified</b> | Lead cannot be tied to an opportunity.   |
| <b>Other</b>        | The lead's qualification does not fit the standard states.   |

## Updating a lead

1. Navigate to any lead using the checkbox or by selecting 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 the desired lead and choose **Create draft opportunity**.
2. Choose **Create draft opportunity**, which automatically generates 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](#).

## Receiving leads shared by AWS

Lead invitations from AWS appear in the **Lead invitations** tab, where you can accept or reject them within a 5-business-day window. You must accept a lead invitation before the full lead detail, including contact information, is made visible. Rejected leads are automatically removed from the **Lead invitations** tab.

### 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, select one or more leads using the checkboxes, and then choose **Accept invitation**. Alternatively, select a lead invitation and choose **Accept invitation** in the upper-right corner.
2. A confirmation dialog appears. Confirm your acceptance.
3. A banner will appear informing of the successful acceptance.

Once accepted, the full lead detail, including contact information, becomes visible. Accepted leads appear on the **Leads** tab, where they can be enriched with AWS insights, edited, and converted to opportunities.

## Importing leads

The **Import leads** feature in AWS Partner Central lets you create multiple partner-originated leads at once. Upload a CSV file to import your leads. Each valid row in the file creates one lead through the APN Customer Engagements (ACE) program. You can import up to 100 leads per file.

After import, you can enrich your leads with AWS engagement signals, including recommended actions and AWS insights like Marketplace engagement score. Use these insights to prioritize outreach and identify leads most likely to convert to opportunities.

### CSV template

To ensure your data is formatted correctly, download the CSV template from the **Import leads** page. The template contains 17 columns. Use the exact column headers shown below — the system uses them to map your data to lead fields.

### Required fields

The following fields are required. Rows missing any of these fields fail validation and appear in the failed records CSV.

| Column       | Format             | Description  | Example   |
|--------------|--------------------|--|-----------|
| Company Name | Max 120 characters | Legal name of the customer's company. This value is also used to generate the lead's display title in AWS Partner Central. | Acme Corp |

| Column                 | Format                                | Description  | Example                        |
|------------------------|---------------------------------------|--|--------------------------------|
| Country                | Predefined value                      | Two-letter country code for the customer's location, in ISO 3166-1 alpha-2 format. The code must match one of the accepted values. Download the template for the full list. Common values: US, GB, DE, IN, JP, AU, CA, FR, SG, BR. | US                             |
| Contact Business Title | Max 80 characters                     | Job title or role of the primary contact at the customer company. This field is always required — rows without a business title fail with a <code>MISSING_CONTACT</code> error.  | CTO, VP of Engineering         |
| Contact First Name     | Max 80 characters                     | First name of the primary contact. First name, last name, and email are all required for each contact.   | Jane                           |
| Contact Last Name      | Max 80 characters                     | Last name of the primary contact.  | Doe                            |
| Contact Email          | Valid email format, max 80 characters | Business email address of the contact. Required, and must be a valid email format (for example, <code>user@domain.com</code> ). A malformed value triggers an <code>INVALID_EMAIL</code> error.                                    | <code>jane.doe@acme.com</code> |

## Optional fields

The following fields provide additional context for your leads. Leave them blank if the information is not available.

| Column          | Format             | Description  | Example               |
|-----------------|--------------------|--|-----------------------|
| Row Id          | Positive integer   | A unique identifier for each row. Used for deduplication within the file — if two rows share the same Row Id, the second row is skipped with a DUPLICATE_ROW error. Not sent to AWS.   | 1, 2, 3               |
| Street Address  | Max 255 characters | Full street address of the customer's primary office or location.  | 123 Main Street       |
| City            | Max 255 characters | Customer's city of operation.  | Seattle               |
| State Or Region | Free text          | State, province, or region within the country.   | WA                    |
| Postal Code     | Max 20 characters  | ZIP or postal code.  | 98101                 |
| Industry        | Predefined value   | Industry vertical the customer operates in. If provided, must match exactly one of the accepted values. Leave blank if unsure — an unrecognized value triggers an INVALID_ENUM_VALUE error. Accepted values: Aerospace , Agriculture , Automotive , Computers and Electronics , Consumer Goods, Education , Energy - Oil and Gas, Energy - Power and Utilities , Financial Services , Gaming, Government , Healthcar | Software and Internet |

| Column      | Format                       | Description   | Example          |
|-------------|------------------------------|---|------------------|
|             |                              | e ,Hospitality ,Life Sciences,Manufacturing , Marketing and Advertising ,Media and Entertainment ,Mining,Non-Profit Organization ,Other, Professional Services , Real Estate and Construction ,Retail,Software and Internet,Telecommunications ,Transportation and Logistics ,Travel,Wholesale and Distribution . |                  |
| Website Url | 4–255 characters, URL format | Customer's company website URL. Must be 4 to 255 characters and use a valid URL format (for example, https://acme.com ). A value that is too short or not URL-formatted causes the row to fail.   | https://acme.com |
| DUNS        | 9-digit numeric string       | The customer's D-U-N-S Number, a unique business identifier issued by Dun & Bradstreet. Used for firmographic enrichment and deduplication.   | 123456789        |

| Column           | Format                        | Description  | Example                             |
|------------------|-------------------------------|--|-------------------------------------|
| Contact Phone    | E.164 format, up to 15 digits | Phone number of the primary contact. Must follow E.164 international format: a + sign followed by the country code and number with no spaces or dashes. An incorrectly formatted phone number causes an <code>API_ERROR</code> during lead creation. | +12065551234                        |
| Use Case         | Free text, max 255 characters | A free-text description of the AWS use case or workload the lead relates to. This value is not validated against a fixed list of values.   | Migration and Transfer              |
| Business Problem | 20–2000 characters            | A description of the customer's core business challenge or pain point. This helps AWS understand the context of the lead. If provided, must be between 20 and 2000 characters.   | Legacy infrastructure modernization |

## Import process

To import leads, navigate to the **Leads** tab in AWS Partner Central and choose **Import leads**. The import runs through the following steps:

1. **Select your file** — Choose a CSV file (.csv format only). The file must contain between 1 and 100 rows of lead data. If the file format is invalid or exceeds the row limit, the **Import leads** button remains disabled.
2. **Column mapping** — The system validates that all required template column headers are present. If required columns are missing, an error is displayed with a **Download template** button so you can start with the correct format.

3. **Validation** — Each row is checked for required fields, data formatting, valid enum values, and duplicate detection. Rows that fail validation are collected into a downloadable failed records file. If all rows fail, you are redirected to the Leads page with an error notification.
4. **Lead creation** — Valid rows are submitted to create leads. You are navigated to the Leads page with one of three outcomes:
  - **Success** — All rows were created successfully.
  - **Partial success** — Some rows were created, but others failed. A **Download failed records** link is provided.
  - **Error** — All rows failed. A **Download failed records** link is provided.

## Troubleshooting import errors

When rows fail during import, you can download a failed records CSV file that contains all original columns plus an `Error Code` and `Error Message` column. Use the error code to identify and fix the issue, then re-upload only the failed rows.

| Error code      | Cause   | Resolution  |
|-----------------|---|---|
| MALFORMED_ROW   | The row is entirely empty or contains only whitespace.  | Remove the empty row, or populate at least the required fields.             |
| MISSING_COMPANY | The <code>Company Name</code> field is empty.   | Add a valid company name.   |
| MISSING_COUNTRY | The <code>Country</code> field is empty.  | Add a valid ISO 3166-1 alpha-2 country code (for example, US, DE, JP).      |
| MISSING_CONTACT | One of the required contact fields is empty: <code>Contact Business Title</code> , <code>Contact First Name</code> , <code>Contact Last Name</code> , or <code>Contact Email</code> . | Provide a business title, first name, last name, and email for the contact. |

| Error code         | Cause  | Resolution  |
|--------------------|--|---|
| INVALID_EMAIL      | The Contact Email value is present but not a valid email format.   | Use a valid email address (for example, jane.doe@acme.com ).  |
| INVALID_ENUM_VALUE | The Industry or Country value does not match an accepted value.  | For Industry (optional): use a supported value from the CSV template, or leave the field blank. For Country (required): replace with a valid ISO 3166-1 alpha-2 code from the template (for example, US, DE, JP). |
| DUPLICATE_ROW      | The Row Id value has already appeared in an earlier row in the same file.                                    | Ensure each row has a unique Row Id, or remove the duplicate rows.  |
| API_ERROR          | The row passed validation but the lead creation request failed (throttling, server error, or network error). | Wait a few minutes and re-import only the failed rows. If the issue persists, contact AWS Partner Central support.  |

## Failed records CSV

When an import partially or totally fails, AWS Partner Central generates a failed records CSV file that you can download from the **Download failed records** link on the Leads page. This file contains every row that was not successfully imported, along with the reason for failure.

### File format

The failed records CSV contains all of the original 17 template columns with your data preserved exactly as uploaded, plus two additional columns appended at the end: `Error Code` and `Error Message`. Rows appear in the same order as your original file.

### Validation errors

Rows that fail during the validation step (before lead creation is attempted) include error codes such as `MISSING_CONTACT`, `MISSING_COMPANY`, or `INVALID_EMAIL`. For example, if you upload rows without a `Contact Business Title`, each row appears in the failed records file with `Error Code` set to `MISSING_CONTACT` and `Error Message` set to `Contact business title is required`.

## API errors

Rows that pass validation but fail during lead creation appear with `Error Code` set to `API_ERROR`. The `Error Message` contains the specific reason returned by the service. For example, a phone number that does not follow E.164 format (+ followed by country code and number) produces an error message describing the format constraint. Review the error message, correct the data in the failed records file, and re-upload only the failed rows.

## Re-importing failed rows

To fix and re-import failed rows, download the failed records CSV, correct the values flagged in the `Error Code` and `Error Message` columns, remove those two columns, and upload the corrected file. You do not need to re-import rows that succeeded in the original upload.

## Limits

| Limit                     | Value           |
|---------------------------|-----------------|
| Maximum rows per CSV file | 100             |
| File format               | CSV (.csv) only |
| Minimum rows per file     | 1               |

## Enriching leads

Lead enrichment is a capability in AWS Partner Central that enhances your leads with AWS data. Submit your leads to receive AWS propensity signals and to check account eligibility for select AWS programs, funding benefits, and sales motions.

## Getting started

Lead enrichment is available on the **Leads** page in AWS Partner Central, or through the AWS Partner Central Selling API.

## Enriching leads

Your leads appear in a single view on the **Leads** tab.

1. Navigate to the **Leads** tab. Filter and sort leads by status, source, industry, or enrichment status.
2. Select the leads to enrich by selecting their checkboxes, or choose **Select all**, and then choose **Enrich leads**.
3. Enter a descriptive name for the batch to help you identify it later, and then choose **Enrich leads**.
4. In the **Enriched lead batches** tab, review the enrichment results for your batch.

## Enriched lead batches

The **Enriched lead batches** tab displays your enriched leads. The main table provides visibility into batch status, lead quantity, and leads where enrichment data was not available. Choose a lead batch to view the results, or export the enriched lead list to CSV or PDF.

To view individual lead details, choose the **Lead ID** to open the lead with its enriched details.

## Understanding enrichment results

Enriched leads include a readiness assessment and AWS insights to help you prioritize and act on each lead.

### Readiness assessment

Each enriched lead receives a recommended action with a confidence level (High, Medium, or Low) that reflects the strength of the underlying signals:

- **Contact Ready** – Prioritize for immediate sales outreach.
- **Nurture Lead** – Early interest signals. Follow up with marketing nurture campaigns.

- **Limited Potential** – Low propensity. Deprioritize.

## AWS insights

Enriched leads include the following insights:

- **AWS Marketplace engagement score** – An estimate of how likely the account is to procure a solution through AWS Marketplace. High, Medium, and Low scores help prioritize accounts for Marketplace engagement.
- **AWS Marketplace solution score** – Predicts an account's likelihood to purchase a category-specific solution.
- **Account eligibility** – Checks an account for select program, funding benefit, and sales motion eligibility.
- **Firmographic data** – Employee count, region, and geography.

## Using agents for lead prospecting

AWS Partner Central agents support AI-powered capabilities that generate personalized sales assets for enriched leads. After a lead is enriched with AWS signals, the **Actions** menu on the lead detail page unlocks AI-powered creation of lead overviews, sales plays, call scripts, and outreach emails.

### Prerequisites

- Your account has migrated to AWS Partner Central in the AWS Management Console.
- Your leads have been enriched with AWS signals through the lead enrichment workflow. For more information about the lead enrichment workflow, see [the section called “Enriching leads”](#).
- Your AWS Identity and Access Management (IAM) user or role must have the following permissions:
  - `partnercentral:List*`
  - `partnercentral:Get*`
  - `aws-marketplace:ListEntities`
  - `aws-marketplace:DescribeEntity`

**⚠ Important**

Agent outputs are AI-generated and intended to guide your sales activities. They do not guarantee accuracy or completeness. Verify all AI-generated content before using it in customer engagements.

## How to access agent actions

1. Open the **Leads** page, and then choose the **Enriched lead batches** tab.
2. Choose a completed batch to view its individual enriched leads.
3. Choose a lead to open its detail page with AWS insights, solution match data, and AI-powered actions.
4. Use the **Actions** menu to select the desired AI-generated output.

The following sections describe each available agent action.

### Sales play

The sales play agent generates a sales strategy tailored to the prospect's business needs, AWS engagement signals, and your solution. The sales play includes positioning guidance, objection handling, recommended next steps, and messaging relevant to the prospect and AWS insights.

**Best for:** account planning, pre-call preparation, sales team briefings, and strategic account development.

### Lead overview

The lead overview agent provides a concise summary of the lead, including company context, enrichment insights, and qualification status. The lead overview combines AWS signals and lead data into a brief summary.

**Best for:** quickly briefing team members, pipeline reviews, lead handoffs between reps, and prioritization discussions.

## Call script

The call script agent generates a personalized phone call script with talking points, discovery questions, and messaging relevant to the prospect and AWS insights. The script is structured to guide a productive conversation from introduction through next steps.

**Best for:** outbound prospecting calls and follow-up conversations.

## Outreach email draft

The outreach email agent creates a targeted prospecting email with messaging aligned to the prospect's industry, AWS engagement signals, and your capabilities. The email draft is ready to personalize and send.

**Best for:** initial outreach, re-engagement sequences, and scaling personalized email prospecting.

### Note

You can run each agent action multiple times on the same lead to produce new versions. Agent outputs are also available through Model Context Protocol (MCP) integration.

## Related resources

- [the section called “Enriching leads”](#)
- [Agents for opportunity management](#)

# 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.

Every opportunity is assigned a co-sell motion and an Opportunity Quality score that together determine how AWS engages on the deal. For details, see [Co-sell engagement](#).

## 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  |
|-----------------------------|--|
| <b>Prospect</b>             | Customer opportunity has been identified.  |
| <b>Qualified</b>            | 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. |
| <b>Technical validation</b> | 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.                           |
| <b>Business validation</b>  | Business stakeholders have communicated their agreement on the financial viability of the solution.  |
| <b>Committed</b>            | The customer has agreed to the solution and commits to moving with technology, architecture, and economics.  |
| <b>Launched</b>             | Billing for the solution has begun.  |

| Stage       | Description   |
|-------------|---|
| Closed lost | The end customer selected another cloud provider or is not ready to move forward with the solution. |

## Co-sell engagement

Every opportunity is assigned a co-sell motion and an Opportunity Quality score. Together they determine how AWS engages on the deal and what the AWS Partner Central agent does to help.

### Co-sell motion

A co-sell motion is assigned to every opportunity and determines who leads it:

- **AWS Field-engaged** – Your opportunity is co-sell ready and matched with an AWS sales team for direct collaboration. The agent moves to a supporting role, preparing research, tracking actions, and keeping the record current.
- **Agent-engaged** – The agent qualifies and enriches the opportunity directly with you and surfaces insights and recommendations to strengthen the submission.
- **Partner-led** – You own and drive the opportunity with agent support, including sales plays, customer insights, and resources.

### Opportunity Quality score

Each opportunity receives an Opportunity Quality score from 0 to 100, shown as [score] / 100 with an indicator showing whether the score moved up, down, or stayed flat since the last update. The score updates continuously as you and the agent improve the opportunity.

A higher Opportunity Quality score may increase the likelihood that an AWS field seller engages with your opportunity, but it does not guarantee engagement.

The AWS Partner Central agent knows about your opportunity and returns the co-sell motion, the Opportunity Quality score and trend, and recommendations to strengthen the submission.

### Improve opportunity hygiene

Keep your opportunity complete and current so AWS can accelerate the co-sell engagement. Enrich these fields manually or with the agent:

- **Title:** Name the customer, the workload, and the delivery model so the deal is easy to identify.
- **Customer business problem:** Describe this customer's specific situation, what is forcing them to act now, and the outcome they expect. Avoid generic descriptions that could apply to any customer.
- **Stage:** Keep the stage accurate, and move the opportunity to Launched or Closed Lost as soon as the deal closes.
- **Next steps:** Include a specific action with a deliverable, a named owner, and a concrete date, and refresh it each time the deal moves.
- **Estimated monthly recurring revenue:** Base the estimate on the [AWS Pricing Calculator](#) rather than a guess.
- **Industry and use case:** Select accurate values rather than leaving them as Other.
- **AWS services:** List the AWS services the customer is adopting, in the description and the products field, not services your own product runs on.
- **Partner solution:** Tag your registered AWS solution so the deal links to a validated offering.

The agent can help you strengthen each of these. For details, see [Agents for opportunity management](#).

## 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 and let the agent help qualify and strengthen the opportunity as the deal progresses.

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 also create opportunities through a short conversation with the AWS Partner Central agent. Describe the deal or upload a supporting document, and the agent extracts the fields, enriches customer details, and creates the opportunity after you approve. For details, see [Agents for opportunity management](#).


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. Partners who transact in total contract value (TCV) can submit TCV and contract duration, and deal sizing converts both to a forecasted MRR.

## Create an opportunity

1. Navigate to **Sell, Opportunities** in the left-side navigation.
2. Choose **Create opportunity**, then select one of the following options from the dropdown:
  - **Create using wizard** – Continue with the multi-step form described in the steps below.
  - **Create using agent** – Create the opportunity through a short conversation with the AWS Partner Central agent. Describe the deal or upload a supporting document, review the fields the agent extracts, and approve to submit. For details, see [Agents for opportunity management](#).
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**.
  - For **Customer business problem**, describe this customer's specific pain, what is forcing them to act now, and the outcome they expect. Avoid generic descriptions that could apply to any customer.
  - Select the most accurate **Use Case** and **Industry Vertical** rather than leaving them as **Other**, so AWS can route the opportunity correctly.
  - 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.
- In the **AWS Marketplace products and solutions** section, associate one or more of your solutions and/or one or more AWS Marketplace products to the opportunity. To associate solutions or AWS Marketplace products from an AWS Account connected via [Subsidiary account connection](#), enter the corresponding ARNs in the **Enter solution ARNs manually** or **Enter AWS Marketplace product ARNs manually** fields.

 **Note**

You are required to associate at least one solution or AWS Marketplace product to create an opportunity. Only solutions in "Limited" or "Public" status can be associated to an Opportunity.

- 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:

- **Forecast MRR from TCV** – Enter your total contract value (TCV) and contract duration in months, and deal sizing converts both to a forecasted MRR. This method serves partners who estimate deals in TCV, such as multi-year SaaS contracts or software licensing.
- **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 Forecast MRR from TCV

When you select Forecast MRR from TCV, you submit the total contract value of the deal and the model returns a forecasted MRR.

1. Enter TCV and contract duration:
  - Enter the **Total contract value** in USD or EUR. The value must be greater than zero.
  - Enter the **Contract duration** in months. Supported range is 1 to 144 months.
  - Both fields are required. The system returns a validation error if you submit one without the other.

## 2. Review the forecasted MRR:

- The model converts TCV and contract duration to a forecasted MRR within 10 seconds and populates the MRR field.
- The forecasted MRR is read-only on this method. To enter your own MRR, switch the calculation method to Manual entry with AI insights or Pricing Calculator URL. Switching methods clears the TCV and contract duration values.
- The forecasted MRR carries the disclaimer: "Forecasted MRR is an estimate for planning purposes only and does not represent actual revenue, quota retirement, or any financial commitment."

## 3. Modify your estimate:

- To update the forecasted MRR, change the TCV value or contract duration. The model recalculates and updates the MRR field.
- Forecast MRR from TCV and Pricing Calculator URL are mutually exclusive on the same opportunity. To switch, change the calculation method.

## 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.

Once the opportunity is submitted, an Opportunity Quality score and a co-sell motion are automatically assigned. For details, see [Co-sell engagement](#).

#### **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.

## Agents for opportunity management

AWS Partner Central uses AI-powered agents to take action on your opportunities, including creating opportunities through conversation, recommending solutions and next steps, generating tailored sales plays, progressing opportunities through stages, and creating fund requests. The agents also surface pipeline intelligence and customer profiles to inform those actions.

### 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:CreateOpportunity`
  - `partnercentral:UpdateOpportunity`
  - `partnercentral:SubmitOpportunity`
  - `partnercentral:AssignOpportunity`
  - `partnercentral:AssociateOpportunity`
  - `partnercentral:DisassociateOpportunity`

- `partnercentral:StartEngagementFromOpportunityTask`
- `partnercentral:UseSession`
- `aws-marketplace:DescribeEntity`
- `aws-marketplace:SearchAgreements`
- `aws-marketplace>ListEntities`

### 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 creation

The agent creates new opportunities through a short conversation instead of completing a multi-step form, which reduces data entry and lets partner sales teams spend more time selling.

### To create an opportunity

1. On the Opportunities listing page, choose **Create using agent** from the **Create opportunity** dropdown.
2. In the conversational panel, describe the deal in natural language or upload a supporting document such as meeting notes, a proposal, or a call transcript (PDF, DOCX, XLSX, TXT).
3. Review the fields the agent extracted and enriched, confirm or correct the values, and add any missing information.
4. Approve the draft. The agent creates the opportunity, submits it for AWS review, and returns the Opportunity ID with a status of *Pending Approval*.

To create an opportunity from an existing one, use agents to clone the opportunity.

## 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 AWS Partner Central from your partner account. It does not access data from other partners or accounts. |
| 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 Opportunity Quality score, recommendation, and AWS recommended actions, and use the agent to fast-track the improvements. For details, see [Agents for opportunity management](#).
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 AWS Partner Central 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**.

Include a specific action with a deliverable, a named owner, and a concrete date, and refresh it each time the deal moves. The next step is used to calculate your Opportunity Quality score.

### 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.

Opportunities in a terminal stage (Launched or Closed/Lost) do not show an Opportunity Quality score or a co-sell motion. This is why some open opportunities are scored and others are not.

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 AWS Partner Central Opportunity page.

Adding a customer contact strengthens the opportunity and helps improve your Opportunity Quality score.

### 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 AWS Partner Central 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) | <p>Customer company name:</p> <ul style="list-style-type: none"> <li>• Choose an industry vertical from the pick list. If you copy data from another file, paste it as text.</li> <li>• Needs to map to valid selection. Refer to Values sheet containing mapping.</li> <li>• Industry Other (required if industry vertical is Other) (column C).</li> <li>• Required field when Industry Vertical selected is Other.</li> <li>• 255 characters maximum.</li> </ul> |

| Field name (required)         | Description   |
|-------------------------------|---|
|                               | <ul style="list-style-type: none"> <li>Government requires the following: Does opportunity belong to NatSec? (column D)</li> </ul>  |
| Country (pick-list value)     | <p>Required conditional fields:</p> <ul style="list-style-type: none"> <li>Needs to map to valid selection. Refer to the Values sheet for mapping.</li> <li>If you copy data from another file, paste it as text.</li> <li>State/province (pick-list value) (column F).</li> <li>When country is set to United States, state/province (column F) is required.</li> </ul>  |
| Postal code                   | <ul style="list-style-type: none"> <li>Field is specific to the end customer's billing postal code.</li> <li>20 characters maximum.</li> <li>If the postal code starts with a zero, reformat the cell to as text.</li> <li>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.</li> </ul> |
| Customer website              | <ul style="list-style-type: none"> <li>Must be a valid domain.</li> <li>No social media pages are allowed.</li> <li>255 characters maximum.</li> <li>If the domain ends in .co, add a forward slash (/) to the end (e.g., www.domain.co/).</li> </ul>   |
| Partner primary need from AWS | <ul style="list-style-type: none"> <li>Required conditional field.</li> <li>Must map to a valid selection. Refer to the Values sheet for mapping.</li> <li>If you select Co-Sell, then Sales Activities is required (column W).</li> </ul>  |
| Partner project title         | Project title can be 60 characters maximum.   |

| Field name (required)                   | Description  |
|---|--|
| 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"> <li>• Must map to valid use case. Refer to the Values sheet for mapping.</li> <li>• If you copy data from another file, paste it as text.</li> </ul>  |
| 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"> <li>• Future date must be in mm/dd/yyyy format. Update column formatting prior to and after saving the .csv file.</li> <li>• 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.</li> </ul> |
| Opportunity type                        | <ul style="list-style-type: none"> <li>• Select from the list of valid values only to specify if the project is a net new business, renewal or expansion.</li> <li>• If the opportunity is a renewal or expansion, you can add the Parent Opportunity ID on Column Y</li> </ul>  |
| Delivery model (pick-list value)        | <ul style="list-style-type: none"> <li>• Needs to map to valid selection. Refer to the Values sheet for mapping.</li> <li>• If you copy data from another file, paste it as text.</li> </ul>   |

| Field name (required)                              | Description  |
|--|--|
| Is opportunity from marketing activity? (required) | <ul style="list-style-type: none"> <li>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).</li> <li>If you choose Yes, the following fields are also optional: <ul style="list-style-type: none"> <li>AWS Marketing Campaign (Column AK).</li> <li>Marketing Activity Channel (Column AL).</li> <li>Marketing Activity Use-Case (Column AM).</li> </ul> </li> <li>Must map to a valid selection. Refer to Values sheet for mapping.</li> </ul> |
| 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:

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

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"> <li>Required conditional field.</li> <li>State is a required field when country is set to United States.</li> <li>If you copy data from another file, paste it as text.</li> </ul>   |
| Street address and city                        | 255 alphanumeric characters maximum (each).   |
| Competitive tracking (pick-list value)         | <ul style="list-style-type: none"> <li>Required conditional fields.</li> <li>Must map to a valid use case. Refer to the Values sheet for mapping.</li> <li>If Other Competitors (column AI) is selected, column AJ is required (255 characters maximum).</li> </ul> |
| Marketing development funded (pick-list value) | Must map to a valid use case. Refer to the Values sheet for mapping.  |

| Field name (optional)                                   | Description  |
|---|--|
| 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 AWS Partner Central 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              |
|---|--|-------------------|
| <a href="#">Feature launch of Partner Revenue Attribution ID feature</a>                        | Added managed policies for managing access to Partner Revenue Attribution ID feature.                                  | June 30, 2026     |
| <a href="#">Feature launch of lead enrichment</a>   | Added documentation for enriching leads with AWS insights. For more information, see <a href="#">Enriching leads</a> . | June 16, 2026     |
| <a href="#">Feature launch of ACE Resonate</a>  | Updated sales guide with changes for ACE resonate. For more information, see <a href="#">Managing Opportunities</a> .  | June 16, 2026     |
| <a href="#">Feature launch of Migration Program Acceleration opportunities data enrichments</a> | Added documentation for APN Programs with Migration Program Acceleration details.                                      | January 30, 2026  |
| <a href="#">Feature launch of Tagging AWS partition for opportunities</a>                       | Added documentation for Tagging AWS partition for opportunities.   | December 11, 2025 |
| <a href="#">Feature release of deal sizing</a>  | Updated creating an opportunity documentation with deal sizing step.   | December 8, 2025  |
| <a href="#">AWS Partner Central console launch</a>  | Updated documentation for the launch of the new AWS  | November 30, 2025 |

Partner Central console with enhanced partner discovery , connection management, and opportunity collaboration features.

[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