previous Home next

2.01.16 Decision Board

The **Decision Board** form administers the involved people (Contact Person) in the Sales Pipeline in the system. The position, the influence, the attitude and various other settings can be entered in here.

Tip: For more on this subject see chapter 3.11.04 The Contact System.

The form consists of the following elements:

On the "Master Data" tab:

- **Id:** The element number defines distinctly the decision boards in the system.
- **Sales Pipeline:** This field assigns a sales pipeline to the decision board.
- **Customer:** This field assigns a contact to the decision board.
- **Contact Person:** In here the contact person to the contact is defined to the decision board.
- **Sales Role:** In the collection (see Administration Guide) defined roles of the decision board (e.g. user, decision board, approver, tester/inspector, etc.) are stored in this field.
- **Influence:** The in Collections (see Administration Guide) defined influential characteristics (e.g. large, middle, small, etc.) can be stored in the field influence.
- **Attitude and Reason of Attitude:** The in Collections (see Administration Guide) defined attitude of the decision board (e.g. positive, neutral, negative, etc.) can be stored in the field influence. The reason for this attitude can entered in the text field reason.
- **Business Goal, Personal Goal und Decision Criteria:** Further attitudes of the decision board, such as business goal, personal goal and decision criteria.
- **Note:** Comments concerning the decision board can be entered in this field.