

[previous](#) [Home](#) [next](#)

2.01.17 Decision Board

The **Decision Board** form administers the persons participating in the sales pipeline (contact person) in the system. The position, the influence, the attitude and various other settings can be entered here.

Tip: For more on this subject see chapter [3.11.04 The Contact System](#).

The screenshot shows a web-based form titled "DecisionBoard 2 TLC Telecommunications Corporation". The form has a menu bar with "Document", "Edit", "View", and "Back references". The form fields are as follows:

- ID:** A text field containing the value "2".
- SalesPipeline:** A dropdown menu showing "1 TLC Telecommunications Corporation".
- Customer:** A dropdown menu showing "TLC Telecommunications Corporation".
- Contact:** A dropdown menu showing "Williams George" with a search icon and a close icon.
- SalesRole:** A dropdown menu showing "Approver".
- Influence:** A dropdown menu showing "Large".
- Attitude:** A dropdown menu showing "# Positive" with a search icon. A "Reason" field next to it contains the text "Strong concept".
- BusinessGoal:** A text field containing "New sales distribution in London area".
- PersonalGoal:** A text field containing "Higher position".
- DecisionCriteria:** A text field containing "Financing concept".
- Note:** A large text area for additional notes.

The form consists of the following elements:

On the "Main" tab:

- **Number:** The element number defines distinctly the decision boards in the system.
- **Sales Pipeline:** This field assigns a sales pipeline to the the decision board.
- **Customer:** This field assigns a contact to the decision board.
- **Contact:** Here the contact's contact person is defined to the decision board.
- **Sales Role:** The in Collections (see Administration Guide) defined positions of the decision boards (e.g. user, decision board, approver, tester/inspector, etc.) are stored in the field position.
- **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 for 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.

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