

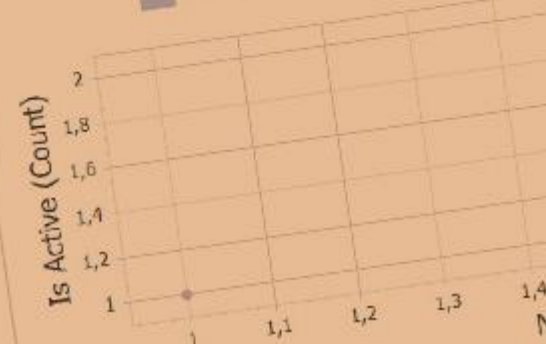
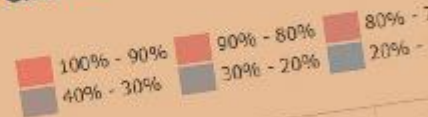
# TAB Co CRM SYSTEM

Dashboard

Client Age

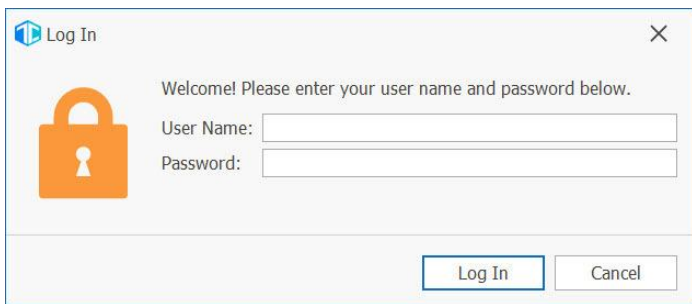


Scattered Clients





TAB Co CRM je platforma implementovana u mikrosoftovoj .net WPF tehnologiji i koristi C# kao programski jezik.



Sistem ima funkcionalnost autentifikacije putem korisnickog imena i lozinke.

Users - TabCoDemoCrm

File Home View Tools

New Delete Refresh Reset View Settings Previous Record Next Record Text to search... Close

Records Creation Edit View Records Navigation Full Text Search Close

Type keywords here

Users x

User Name	Force Password Change	Is Active
Admin	<input type="checkbox"/>	<input checked="" type="checkbox"/>
User	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Main Menu

Calender

System

Users

User Roles

My Account

User: Admin

Čitav sistem je dostupan kao Desktop ili Web varijanta, slike koje šaljemo su isključivo od desktop aplikacije.

Kada se logujemo u sistem vidimo glavni radni prozor.

Users - TabCoDemoGrm

File Home View Tools

New Delete Refresh Reset View Settings Previous Record Next Record

Text to search... Full Text Search

Records Creation Edit View Records Navigation

Close

Type keywords here

Users x

User Name	Force Password Change	Is Active
Admin	<input type="checkbox"/>	<input checked="" type="checkbox"/>
User	<input type="checkbox"/>	<input checked="" type="checkbox"/>

U gornjem djelu se nalaze alati.

Users - TabCoDemoGrm

File Home View Tools

New Delete Refresh Reset View Settings Previous Record Next Record Text to search... Close

Records Creation Edit View Records Navigation Full Text Search Close

Users x

User Name	Force Password Change	Is Active
Admin	<input type="checkbox"/>	<input checked="" type="checkbox"/>
User	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Main Menu  
Calender  
System  
Users  
User Roles  
My Account

User: Admin

Sa ljeve strane glavni meni (navigacija).

Users - TabCoDemoCrm

File Home View Tools

New Delete Refresh Reset View Settings Previous Record Next Record Text to search... Close

Records Creation Edit View Records Navigation Full Text Search Close

Type keywords here

Main Menu

Calendar

System

Users

User Roles

My Account

Users x

User Name	Force Password Change	Is Active
Admin	<input type="checkbox"/>	<input checked="" type="checkbox"/>
User	<input type="checkbox"/>	<input checked="" type="checkbox"/>

User: Admin

U srednjem djelu je prikazan trenutni izbor i on služi kao glavni dio za upravljanje podacima.

File Home View Tools

New Delete Refresh Reset View Settings Previous Record Next Record

Records Creation Edit View Records Navigation Full Text Search Close

U donjem lijevom ćošku vidimo korisnika koji je trenutno prijavljen.

- Type keywords here
- Main Menu
- Calendar
- System
- Users
- User Roles
- My Account

Users	
User Name	
Admin	<input type="checkbox"/> Force Password Change <input checked="" type="checkbox"/> Active
User	<input type="checkbox"/> Force Password Change <input type="checkbox"/> Active

User: Admin

File Home View Tools

New Delete Refresh Reset View Settings Previous Record Next Record

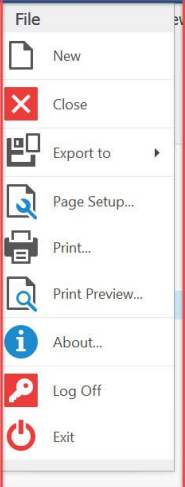
Records Creation Edit View Records Navigation Full Text Search Close

U desnom vidimo značku za notifikacije/termine koje trenutno imamo na čekanju.

- Type keywords here
- Main Menu
- Calendar
- System
- Users
- User Roles
- My Account

Users	
User Name	
Admin	<input type="checkbox"/> <input type="checkbox"/>
User	<input type="checkbox"/> <input type="checkbox"/>





Tools

Refresh Reset View Settings Previous Record Next Record Text to search... Close

View Records Navigation Full Text Search Close

Users x

User Name	Force Password Change	Is Active
Admin	<input type="checkbox"/>	<input checked="" type="checkbox"/>
User	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Klikom na glavni meni dobijamo opcije koje možemo da izvedemo na trenutnom objektu ili sa čitavom aplikacijom.

File Home View Tools



New



Delete



Refresh

Reset View  
SettingsPrevious  
Record

Next Record



Close

Records Creation

Edit

View

Records Navigation

Full Text Search

Close

Type keywords here

Scheduler Event x

Main Menu

Clients

Calendar

System

&lt; &gt; 25 April - 29 May 2022

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
<b>25 April</b>	26	27 18:30 19:30 Skype meeti...	28	29	30	1 May
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	

&lt; April &gt; &lt; 2022 &gt;

MO	TU	WE	TH	FR	SA	SU
				1	2	3
13	14	15	16	17	18	19
15	16	17	18	19	20	21
16	17	18	19	20	21	22
17	25	26	27	28	29	30

May 2022

MO	TU	WE	TH	FR	SA	SU
						1
17	18	19	20	21	22	23
18	2	3	4	5	6	7
19	9	10	11	12	13	14
20	16	17	18	19	20	21
21	23	24	25	26	27	28
22	30	31				

June 2022

MO	TU	WE	TH	FR	SA	SU
						4
						5
						6
						7
						8
						9
						10
						11
						12
						13
						14
						15
						16
						17
						18
						19
						20
						21
						22
						23
						24
						25
						26
						27
						28
						29
						30
						31
						Today

CRM ima opciju kalendara u kojem možemo da upisujemo termine i ostale događaje u koje možemo da stavljamo napomene koje će biti prikazane kao notifikacije (sl. google kalendaru) i obavještava nas unaprijed koje imamo termine/zadatke. Izgled kalendara možemo mijenjati na godinu/mjesec/sedmicu/dan.

Sedmični prikaz sa notifikacijom.

File Home View Tools

New Delete Refresh Reset View Settings Previous Record Next Record

Records Creation Edit View Records Navigation Full Text Search Close

Text to search...

Type keywords here

Main Menu

Clients

Calendar

System

Scheduler Event

< > 25 - 29 April 2022

	Monday, 25 April	Tuesday, 26 April	Wednesday, 27 April	Thursday, 28 April	Friday, 29 April
11:00					
12:00					
13:00					
14:00					
15:00					
16:00					
17:00					
18:00	Zoom Meeting TabCo d.o.o.				
19:00			Skype meeting with Client		
20:00					
21:00					
22:00					
23:00					

April 2022

MO	TU	WE	TH	FR	SA	SU
13	28	29	30	31	1	2
14	4	5	6	7	8	9
15	11	12	13	14	15	16
16	18	19	20	21	22	23
17	25	26	27	28	29	30

May 2022

MO	TU	WE	TH	FR	SA	SU
						1
18	2	3	4	5	6	7
19	9	10	11	12	13	14
20	16	17	18	19	20	21
21	23	24	25	26	27	28
22	30	31				

June 2022

MO	TU	WE	TH	FR	SA	SU
22		1	2	3	4	5
23	6	7	8	9	10	11
24	13	14	15	16	17	18
25	20	21	22	23	24	25
26	27	28	29	30	1	2
27	4	5	6	7	8	9

Today

Termine nam pokazuje u bojama zavisno o prioritetu i pokazuje zvonce na terminima koji imaju obavjest/notifikaciju u desnom donjem uglu možemo klikom aktivirati preglednik obavjest.

The screenshot displays a calendar application interface. The main window shows a weekly view for April 25-29, 2022. A notification window is open, titled "1 Reminder(s)", with a "Notifications State" set to "Active". The notification details include:

Subject	Alarm Time
Zoom Meeting TabCo d.o.o	25/04/2022 ...

The notification window also features a "Snooze time" dropdown set to "5 minutes" and a "Show Notifications Window" checkbox which is checked. "Snooze" and "Dismiss" buttons are visible at the bottom of the notification window.

The background calendar shows a grid with a blue highlighted cell for Monday, 25 April, at 18:00, labeled "Zoom Meeting TabCo d.o.o". The right sidebar shows monthly views for April, May, and June 2022, with the 25th of April highlighted in blue.

At the bottom left, the user is identified as "User: Admin". At the bottom right, there is a system tray icon showing a bell and the number "1", indicating one notification.

File Home View Tools

New Delete Open Related Record Refresh Reset View Settings Previous Record Next Record Text to search... Close

Records Creation Edit Open Related Record View Records Navigation Full Text Search Close

Type keywords here

Main Menu

Clients

Calendar

System

First Name	Last Name	Email	Phone	Gender	Birth Date	Is Active
Marko	Lazic	marko@tabco.ba	+38765001122	Male	01/01/2000	<input checked="" type="checkbox"/>
Bojana	Kokotovic	bojana@tabco.ba	+38765223355	Female	01/05/2000	<input type="checkbox"/>
Bojan	Kokotovic	bojan@tabco.ba	+38765123456	Male	05/05/1984	<input checked="" type="checkbox"/>

Objekte koje kreiramo i dodamo u CRM mozemo klikom na glavni meni pregledati, tu se nalaze i filteri i pretraga.

Client - TabCoDemoCrm

File Home View Tools

New Delete Open Related Record Refresh Reset View Settings Previous Record Next Record Text to search... Close

Records Creation Edit Open Related Record View Records Navigation Full Text Search Close

Type keywords here

Scheduler Event Client x

First Name	Last Name	Email	Phone	Gender	Birth Date	Is Active
Bojan	Kokotovic				05/05/1984	<input checked="" type="checkbox"/>
Bojana	Kokotovic			Female	01/05/2000	<input type="checkbox"/>

Main Menu

- Clients
- Calendar
- System

Values Text Filters

Enter text to search...

- (All)
- Kokotovic
- Lazic

Clear Filter Close

Klikom na bilo koji naziv kolone služi za sortiranje tog polja po redosljedu ASC/DESC a klikom na filter aktiviramo meni za filtriranje.

x  Last Name = Kokotovic Edit Filter

The screenshot shows a web application interface for a CRM system. At the top, there is a navigation bar with 'File', 'Home', 'View', and 'Tools' menus. Below this is a toolbar with various icons: 'New', 'Delete', 'Open Related Record', 'Refresh', 'Reset View Settings', 'Previous Record', 'Next Record', 'Full Text Search', and 'Close'. A search input field contains the text 'mark' and is highlighted with a red box. Below the toolbar is a 'Main Menu' on the left with options like 'Clients', 'Calender', and 'System'. The main content area displays a table with columns: 'First Name', 'Last Name', 'Email', 'Phone', 'Gender', 'Birth Date', and 'Is Active'. The first row of data is highlighted in blue and contains the following information: Marko, Lazic, marko@tabco.ba, +38765001122, Male, 01/01/2000, and a checked checkbox. A red box highlights the search input field and the first row of the table.

First Name	Last Name	Email	Phone	Gender	Birth Date	Is Active
Marko	Lazic	marko@tabco.ba	+38765001122	Male	01/01/2000	<input checked="" type="checkbox"/>

U dnu ekrana vidimo koji je filter trenutno aktivan, a filtrirati možemo bilo koje polje datume OD - DO, IZMEĐU, Veći OD, Manji OD, možemo da filtriramo po čitavom nazivu, jednom djelu naziva. U alatnoj traci nam se nalazi brza pretraga koja traži u bilo kojem polju upisanu vrijednost.

Bojan - Client - TabCoDemoCrm

File Home View Tools

New Save Save and Close Save and New Delete Cancel Open Related Record Refresh Reset View Settings Previous Record Next Record Close

Records Creation Save Edit Open Related Record View Records Navigation Close

Type keywords here

Main Menu

- Clients
- Calendar
- System
- Users
- User Roles
- My Account

Bojan - Client x

Client

First Name: Bojan Gender: Male

Last Name: Kokotovic Birth Date: 05/05/1984

Email: bojan@tabco.ba  Is Active

Phone: +38765123456

Kada editujemo bilo koji objekat u alatima imamo opcije da sačuvamo/obrišem/dodamo, sistem će nas upozoriti ako slučajno pokušamo zatvoriti neki prozor koji nismo sačuvali.



File Home View Tools



New



Save



Save and Close



Save and New



Delete



Cancel



Open Related Record



Refresh



Reset View Settings



Previous Record



Next Record



Close

Records Creation

Save

Edit

Open Related Record

View

Records Navigation

Close

Type keywords here

Main Menu

Clients

Calendar

System

First Name	Last Na...	Email	Phone	Gender	Birth D...	Is Ac...
Bojan	Kokotovic	bojan@t...	+38765...	Male	05/05/1...	<input checked="" type="checkbox"/>
Bojana	Kokotovic	bojana...	+38765...	Female	01/05/2...	<input type="checkbox"/>
Marko	Lazic	marko...	+38765...	Male	01/01/2...	<input checked="" type="checkbox"/>

Client	
First Name:	<input type="text"/>
Last Name:	<input type="text"/>
Email:	<input type="text"/>
Phone:	<input type="text"/>
Gender:	<input type="text"/>
Birth Date:	<input type="text"/>
	<input type="checkbox"/> Is Active

Za lakši rad imamo mogućnost da djelimo radnu površinu da vidimo 1 ili više stavki na njoj, kao i ostale varijante.

File Home View Tools

New Delete Open Related Record Refresh Reset View Settings Previous Record Next Record Text to search... Close

Records Creation Edit Open Related Record View Records Navigation Full Text Search Close

Type keywords here

Client x

Last Name	Email	Phone	Gender	Birth Date	Is Active
> First Name: Bojan (Count=1)					
> First Name: Bojana (Count=1)					
> First Name: Marko (Count=1)					

Sistem nam omogućava da grupišemo bilo koji objekat po bilo kojem polju. Naravno postoji mogućnost grupisanja više od jednog polja.

File Home View Tools

New Delete Open Related Record Refresh Reset View Settings Previous Record Next Record

Records Creation Edit Open Related Record View Records Navigation

Text to search... Full Text Search

Close

Type keywords here

Client x

## Main Menu

Clients

Calendar

System

Gender Is Active

First Name	Last Name	Email	Phone	Birth Date
Gender: Female (Count=1)				
Gender: Male (Count=2)				
Is Active: Checked (Count=2)				
Bojan	Kokotovic	bojan@tabco.ba	+38765123456	05/05/1984
Marko	Lazic	marko@tabco.ba	+38765001122	01/01/2000

Primjer grupisanja baziran na polu klijenta.

17b

Client - TabCoDemoCrm

File Home View Tools

New Delete Open Related Record Refresh Reset View Settings Previous Record Next Record Record

Text to search... Full Text Search Close

Type keywords here Client x

Drag a column header here to group by that column

First Name	Last Name	Is Active
Bojan	Kokotovic	<input checked="" type="checkbox"/>
Marko	Lazic	<input checked="" type="checkbox"/>
Bojana	Kokotovic	<input type="checkbox"/>

Customization: Client

Search for a column...

- Birth Date
- Email
- Gender
- Old
- Phone

Add... Remove

User: Admin

Sistem nam omogućava da sakijemo razna polja koja nam u nekom momentu nisu potrebna za rad. Kada zatvorimo i otvorimo aplikaciju polja će ostati zapamćena kakva su bila u tom trenutku, kako bismo vratili polja na zadano možemo desnim klikom sve poništiti i vratiti.

File Home View Tools



New



Delete



Change State



Open Related Record



Refresh



Reset View Settings



Previous Record



Next Record

Text to search...



Close

Records Creation

Edit

Open Related Record

View

Records Navigation

Full Text Search

Close

Type keywords here

Dashboard Client x

First Name	Phone	Gender	Birth Date	Is Active
Bojan	+38765123456	Male	05/05/1984	<input checked="" type="checkbox"/>
Bojana	+38765223355	Female	01/05/2000	<input type="checkbox"/>
Marko	+38765001122	Male	01/01/2000	<input checked="" type="checkbox"/>

Main Menu

Clients

Calendar

System

Dashboards

Reports

Analysis

Dashboards

Reports

State Machine

- New Ctrl+N
- Delete Ctrl+D
- Change State
- Open Related Record Ctrl+Shift+O
- Close
- Refresh F5
- Reset View Settings
- Page Setup...
- Print... Ctrl+P
- Print Preview...
- Export to
- Copy Cell Value Ctrl+Shift+C

Customization: Client

Search for a column...

Email

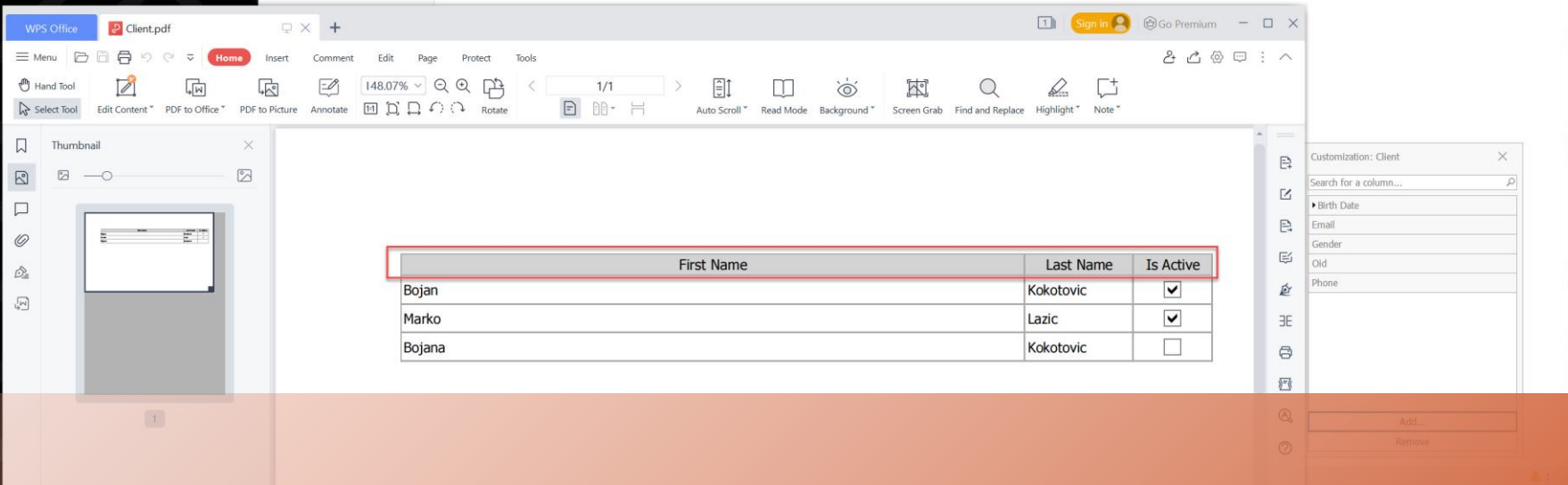
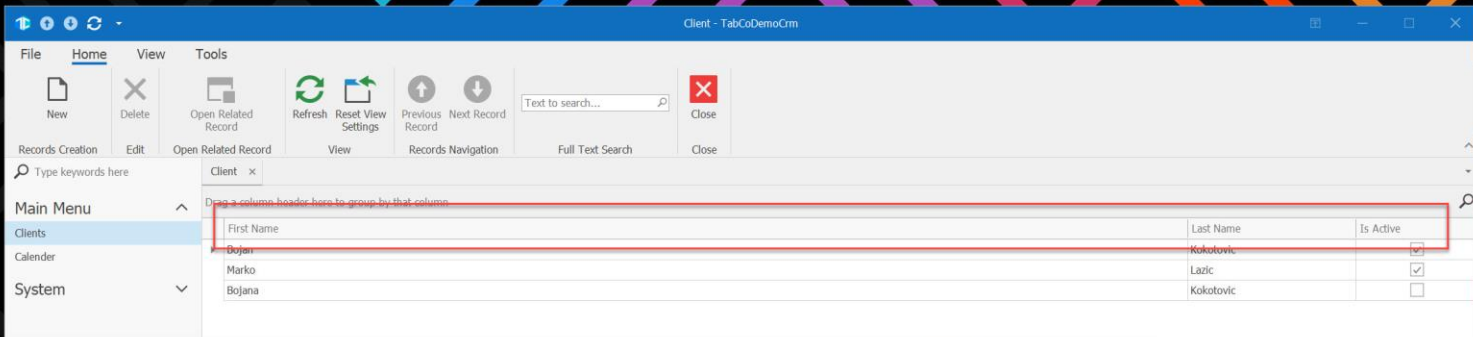
Last Name

Old

Add...

Remove

Vraćanje prikaza polja na zadano.



Kada sakrijemo pojedinačna polja, ta ista neće biti uključena u bilo koji eksport koji izvedemo, primjer naveden je PDF.

Default - Role - TabCoDemoCrm

File Home View Tools

New Save Save and Close Save and New Delete Validate Cancel Refresh Reset View Settings Previous Record Next Record Close

Records Creation Save Edit View Records Navigation Close

Type keywords here

Client Role **Default - Role** x

Name:\* **Default**

Is Administrative  
 Can Edit Model

Permission Policy: Deny all by default

Users **Type Permissions** Navigation Permissions Denied Actions

Target Type	Read	Write	Create	Delete
* Click here to add a new row				
▶ Model Difference	Allow	Allow	Allow	
Application User				
Model Difference Aspect	Allow	Allow	Allow	
Role	Deny			

System

Users

**User Roles**

My Account

User: Admin

Sistem ima mogućnost dodavanja korisnika i rola (uloga), role imaju mogućnost dodavanja permisije (dozvole). Permisije označavaju ko sta može da vidi, briše, edituje, dodaje, navigira, eksportuje...

Test - Scorecard - TabCoDemoCrm

File Home View Tools

New Save Save and Close Save and New Delete Validate Cancel Refresh Reset View Settings Previous Record Next Record Close

Records Creation Save Edit View Records Navigation Close

Scheduler Event Definition Definition Scorecard Test - Scorecard Client Clients - Definition

Name:\* Test

Indicators

Name	Period	Current	Previous	Change	Trend	Sparkline
Clients	Now Vs Last Year T..	2	2	0,00%	No change	

Clients - KPI

Clients  
(Now Vs Last Year To Date)

3  
2  
1  
0

May 2022 June 2022 July 2022 August 2022

Previous

Close

U sistemu CRM imamo mogućnost da kreiramo KPI grafove koji nam, kao u primjeru navedenom na slici mogu pokazati u obliku grafa koliko imamo novih klijenata danas u npr. odnosu na prošlu ili predprošlu godinu itd.



Client\* - Report Designer

Home Layout Page View

Open... Save Save All

Add Calculated Field Add Parameter

Cut Copy

Times New Roman 9,75

B I U S A

Alignment Borders

Extract Style

ReportH... ReportG... ReportD... ReportG... ReportF... ReportO... ReportE...

Styles

Client\* x

Standard Controls

XAF Data Sou...

1 1

PageHeader [one band per page]

First Name	Last Name	Email	Phone	Gender	Birth Date	Is Active
[First Name]	[Last Name]	[Email]	[Phone]	[Gender!]	[Birth Date]	<input type="checkbox"/>

1

Report Explorer

Enter text to search...

- XtraReport
  - TopMargin
  - PageHeader
  - Detail
  - BottomMargin
- Styles
  - ReportDetailBandStyle
  - ReportEvenStyle
  - ReportFooterBandStyle
  - ReportGroupFooterBandStyle
  - ReportGroupHeaderBandStyle
  - ReportHeaderBandStyle
  - ReportOddStyle
- Data Sources
  - collectionDataSource1

Report Explorer Field List

Properties

XtraReport Report

Enter text to search...

Calculated Fields (Collection)

Data Adapter (none)

Data Member

Data Source collectionDataSource1

Filter String

Sistem ima funkciju generisanja izvještaja u bilo kojem obliku, taj dio je kompleksan i neće u ovoj prezentaciji ići u detalje. Preko sto funkcionalnosti za izvještaje raznih vrsta.

Report Design Analyzer

All 0 Errors 0 Warnings 1 Messages

Code Description Source

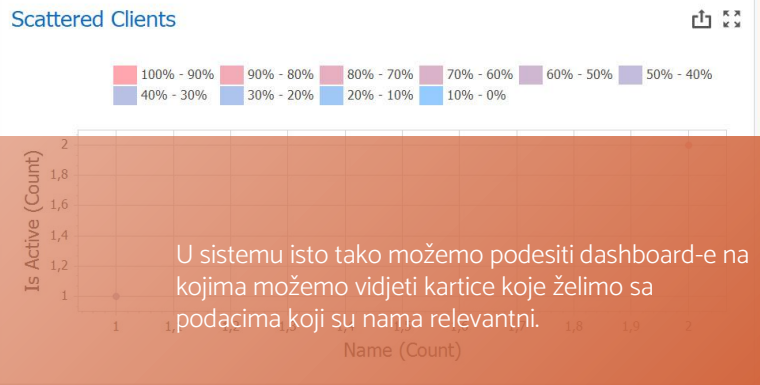
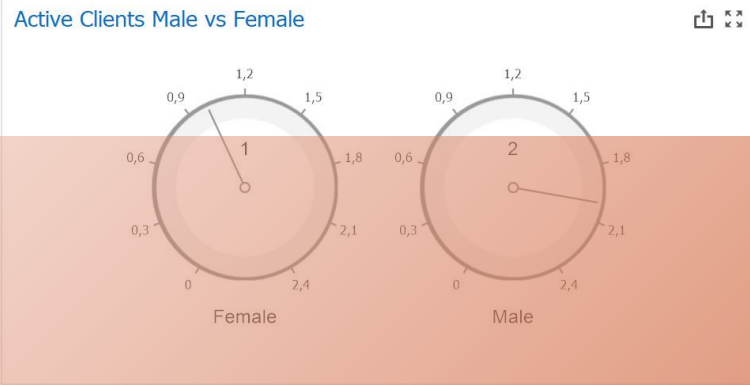
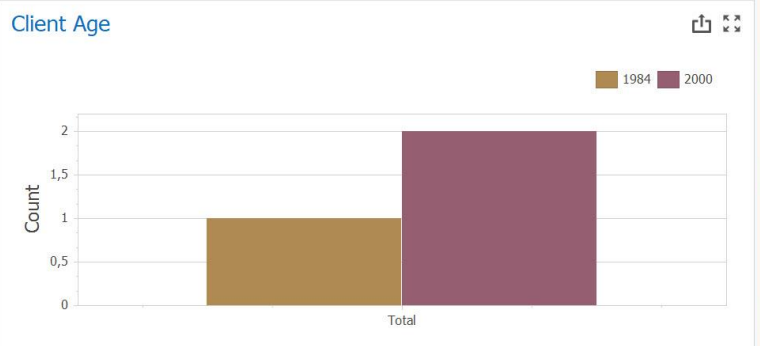
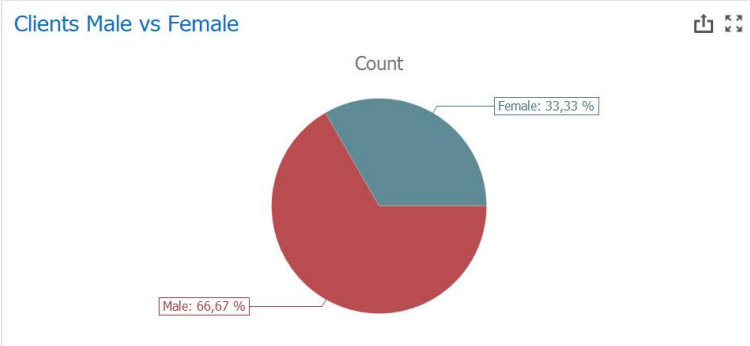
File Home View Tools

Show Dashboard Designer (Edit) Refresh (View) Reset View Settings (View) Previous Record (Records Navigation) Next Record (Records Navigation) Close (Close)

- Type keywords here
- Main Menu
  - System
  - Dashboards
  - Reports
  - Analysis
  - Dashboards
  - Reports
  - State Machine
  - State Machine

Dashboard x

Dashboard



U sistemu isto tako možemo podesiti dashboard-e na kojima možemo vidjeti kartice koje želimo sa podacima koji su nama relevantni.

File

New

Close

Export to

Page Setup...

Print...

Print Preview...

About...

Log Off

Exit

Refresh

Reset View Settings

Previous Record

Next Record

Text to search...

Close

Records Navigation

Full Text Search

Close

CSV File

HTML File

Image File

MHT File

PDF File

RTF File

Text File

XLS File

XLSX File

DOCX File

5 April - 29 May 2022

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
	26	27 18:30 19:30 Skype meeti...	28	29	30	1 May
	3	4	5	6	7	8
	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

April 2022

MO	TU	WE	TH	FR	SA	SU
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

May 2022

MO	TU	WE	TH	FR	SA	SU
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

June 2022

MO	TU	WE	TH	FR	SA	SU
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10
						Today

Kod izvoza podatka, sistem podprava skoro vse glavne formate (ekstenzije).

File

New

Close

Export to

Page Setup...

Print...

Print Preview...

About...

Log Off

Exit

Refresh

Reset View Settings

Previous Record

Next Record

Text to search...

Close

Records Navigation

Full Text Search

Close

5 April - 29 May 2022

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
	26	27 18:30 19:30 Skype meeti...	28	29	30	1 May
	3	4	5	6	7	8
	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

April 2022

MO	TU	WE	TH	FR	SA	SU
28	29	30	31	1	2	3
14	4	5	6	7	8	9 10
15	11	12	13	14	15	16 17
16	18	19	20	21	22	23 24
17	25	26	27	28	29	30

May 2022

MO	TU	WE	TH	FR	SA	SU
17						1
18	2	3	4	5	6	7 8
19	9	10	11	12	13	14 15
20	16	17	18	19	20	21 22
21	23	24	25	26	27	28 29
22	30	31				

June 2022

MO	TU	WE	TH	FR	SA	SU
22		1	2	3	4	5
23	6	7	8	9	10	11 12

User: Admin

Bilo koji objekat se može izvesti od obične tabele do kalendara, izvještaja i dashboard-a. Sistem takođe ima potpunu funkcionalnost direktnog printanja preko stampaća.

# TAB Co CRM SISTEM

Sistem je naravno prilagodljiv izmjenama i dopunama prema zahtjevima klijenta. Moguće je uvezati CRM sa api-em vibera, newsletter-a, e-maila. Svi dodatni zahtjevi klijenta se unaprijed dogovaraju da bi imali što detaljniju specifikciju za izradu i prilagođavanje sistemu.

Sistem je takodje moguće podesiti na neke druge jezike.

