



Apex Planner 3 for Dynamics CRM

Getting Started Guide v. 3.0b
January 2016

Installation

Compatibility

Apex Planner is compatible to CRM 2015, CRM 2015 Update 1 and CRM 2016. CRM 2013 is also supported, using a different solution package (ApexPlanner3_CRM2013.zip).

How to install

Before installing, please **register** on the Apex site. You should immediately receive a registration mail.

1. Download the package from the Apex site (around 1 MB), using the link provided in the registration email (remember that CRM 2013 has its own link).
2. Import the managed solution on Dynamics CRM.
3. Open the **solution configuration page**: go to Settings - Solutions, open the solution "ApexPlannerHtmlScheduler" ("ApexPlannerHtmlScheduler_2013" for CRM 2013 users) and select "Configuration" from the left panel.
4. Insert the **Apex ID** (the one you received in the installation email) in the text field and click the "Activate" button. The page will get your license code from Apex and automatically create a Global Configuration, which contains all the information needed to run the planner.
5. Go to Settings - Security – Users and add the security role "**Apex Planner User**" to all users you want to open the Planner. Make sure that at least your user has this role.
6. Go to any Dashboard section or to Sales - Activities to find the launch icon "Apex Planner 3" in the top ribbon. Click on it to open the planner.



Planner Configurations

Global Configuration

There must be **one and only one** active Planner Configuration of type “Global” (where “Is Global” flag is true). Only this configuration contains the licensing details, such as the license key and the number of users. This configuration is automatically created at the time you activate the Planner.

Global Information Tab

The fields under **Global Information tab**, which are visible only on Global Configurations, should not be altered (otherwise the license will not work). If you have purchased a different license, just click go on the Configuration Page and click the “Get License” button (you don’t need to insert the Apex ID this time): the license information will update automatically.

User Configurations

If you need custom configurations, create a new Planner Configuration record and assign the configuration to the desired user. If a user is not the owner of any Configuration, she will inherit all the settings from the Global Configuration. The information in the Global Information tab is applied to all users and cannot be customized.

Planner Logs

Every time an error occurs on Apex Planner, a new Planner Log record is created. Each record contains information about which user was executing the planner, when the error occurred and the error trace.

About the license

How Apex Planner license works

Each license is bound to a single organization: it can be used only for the CRM organization on which it was activated.

The license key **limits the number of users and the time interval**. You can see the maximum number of users allowed and the expiration date on the Global Configuration. Suppose that you have a license for 50 users that expires on January 1. If your organization has more than 50 active users or if the current date is over January 1, the Planner reports an error. You will see in the next paragraphs how to limit the number of users that you need to license.



License types

There are three types of licenses:

DEMO licenses

These licenses last for one month, but guarantee an unlimited number of users. This is the kind of license that is provided when you register on the Apex site.

SUBSCRIPTION licenses

These licenses include a limited number of users and an expiration date.

PERPETUAL licenses

With these licenses, you have a limited amount of users, but no expiration date.

Update limits

Within one year from the purchase date, you can download and install the latest Apex Planner releases: your license will remain valid. After a year (if your license is not expired yet, mainly because it is PERPETUAL) you can still keep using Apex Planner, but cannot work on the subsequent releases. You can see the Service Expiration Date on the Global Configuration.

How many users do you need to license?

The minimum number of users that you need to have in your license is calculated as **the number of active users visible on the Planner plus the number of active users which have “Apex Planner User” role**. If a user matches both of these rules, is counted only one time.

If you want show less users on the Planner, go to the **Visible Users** grid of the Global Configuration, than add only the users you want to see. Note that, if the grid is empty, all users will be visible.

Help

If you need additional information or help, please write to planner@apex.it.