



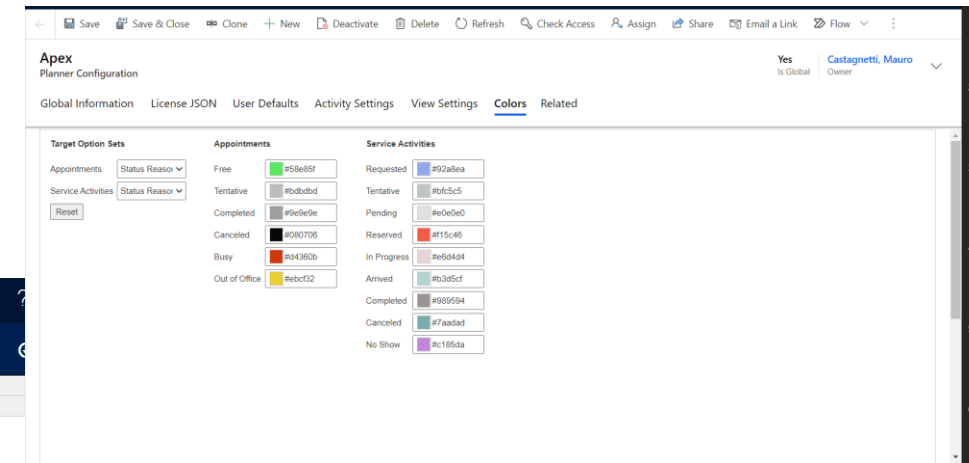
Apex Planner News & Roadmap

Apex Planner

What is and why?



Apex Planner is the HTML5 calendar for organizing Microsoft Dynamics CRM sales, customer service, and equipment. Apex Planner offers over 30 settings per user while still being easy to use and extremely fast. Apex Planner ensures the best planning experience even on mobile devices.



The screenshot displays the Apex Planner interface within the Dynamics 365 environment. The main view is a calendar for the month of February, showing appointments for various users and facilities. A detailed view of a specific appointment is shown, including its start and end times, description, resources, and location. The interface includes a navigation pane on the left with options like Home, Recent, Pinned, My Work, Dashboards, Activities, Appointments, Apex Planner, Customers, and Service. The Apex Planner section is highlighted, showing a list of users and facilities. The calendar view shows appointments for various users and facilities, with a detailed view of a specific appointment.

Apex Planner

What's new?



Version 3_8_180801_20

What's new

- Solution optimized for improved import process and performance applied a deep clean up of entities usage. Now the planner needs fewer CRM entities to work. Fewer dependencies mean more compatibility for different environments and installations.
- Fully compliance with the new Dynamics Unified User Interface (aka UUI), we performed a deep refactoring of the invoked javascript methods to use only the newest functionalities of the latest CRM javascript library. Removed old deprecated functions calls.
- Apex Planner is also fully compliant with the Dynamics CRM version 9 on premise
- New APIs used by the planner to fetch CRM data, are called in asynchronous mode, great improvement of loading speed.
- New Planner UUI complaint icons are available for the Dynamics ribbon.
- A new weekly numbering option for the navbar can be selected from the planner settings, you can now choose between "US" standard and "ISO 8601".
- Improved planner search for appointments, users team, and sites, the overall US is now faster and more responsive.
- Updated the "Get license" setting, now from the solution settings is possible to fetch new licenses and check for an updated one. (only available for online CRM or CRMs with a working internet connection).
- Scrollbar added to unscheduled activities (this allow to see all the unscheduled activities).

Apex Planner

What's new?



Version 3_8_180801_20

Bug Fixes

- Fixed the interface and javascript libraries calls for UUI compatibility.
- Fixed a Dynamics issue with standard CRM forms and special characters, now the planner work correctly in these cases.
- Fixed a time zone issue with the appointments.

Apex Planner

What's new?



- A new weekly numbering option for the navbar can be selected from the planner settings, you can now choose between “US” standard and “ISO 8601”.

The screenshot displays the Apex Planner interface. On the left, a calendar for January 2021 is shown with the week number '53' circled in blue. A blue arrow points from this '53' to the 'Week number standard' dropdown menu in the settings panel on the right. The settings panel is titled 'Apex Planner Configuration' and includes tabs for 'Global Information', 'License JSON', 'User Defaults', 'Activity Settings', 'View Settings', 'Colors', and 'Related'. The 'View Settings' tab is active, showing three sections: 'Timeline', 'Day', and 'Work week'. The 'Work week' section has a dropdown for 'Week number standard' with 'ISO8601' selected. Other options in the dropdown include '--Select--', 'Auto', and 'US'. The 'Month' section shows 'Weeks' as '---'.

Apex Planner

What's new?



- Updated the “Get license” setting, now from the solution settings is possible to fetch new licenses and check for an updated one. (only available for online CRM or CRMs with a working internet connection).

The screenshot shows a browser window with the URL <https://apex.crm4.dynamics.com/tools/solution/edit.aspx?id=%7b44c8a68e-53ff-46c0-9114-88609f26756e%7d>. The page title is "Solution: Apex Planner" and the breadcrumb is "Information". A yellow banner at the top states: "You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from another unmanaged solution." The main content area is titled "Apex Planner License Management" and displays the organization ID: **7fecadd4-fd65-494b-a067-763cf257beeb**. There are two buttons: "Get License" (blue) and "Buy License" (green). Below this, a section titled "How many licenses do I need?" shows: "Users that are visible on Apex Planner: 43", "Users with 'Apex Planner User' Role NOT visible on Apex Planner: 3", and "Required licenses: 46". At the bottom, it states "You have purchased 100 licenses." and provides a link for more information: "More information about the licensing system is available [here](#)."

Apex Planner

What's new?



- Scrollbar added to unscheduled activities (this allow to see all the unscheduled activities).

The image illustrates the process of marking an appointment as unscheduled in the Apex Planner. On the left, a context menu for 'App1' is shown with the 'Mark as Unscheduled' option selected. A blue arrow points down to a confirmation dialog box that asks, 'Are you sure you want to unschedule 'App1'?'. Below the dialog, 'Yes' and 'No' buttons are visible. On the right, the Apex Planner interface is shown in a calendar view for March. The 'Unscheduled' list on the left side of the calendar is scrollable, showing a list of appointments (App1 through App8) with their durations and resources. A blue arrow points to the scrollbar of this list. The calendar grid shows appointments for 'Backlog Dynamics' and 'FAPIM'.

Apex Planner

What's next?



Future Development

What's next for March, 15th 2021

- Apex Planner resource visibility in specific timezone: we have a lot of customers worldwide, there is an increasing needs of managing different timezones, especially regarding the timezone date and hour of a booked resource. We are adding the feature to show the meeting hour in terms of timezone of the booked resource.

Apex Planner

What's next?



Future Development

What's for next Summer 2021

- Apex Planner compliance with the new Microsoft AppSource marketplace protocol (Power Platform, Power Apps).
- Improved Apex Planner payments system to complete the new improved customer licensing experience.
- Apex Planner integration with the new [Universal Resource Scheduling](#) and in particular with the new Service Activity.

Apex Planner

What's next?



Future Development

What's for next Fall 2021

- A new custom Dynamics Form with the same layout and fields like the current appointment modal form will be available. If you customize this form, adding or removing fields, the same will happen to the current modal form. This will allow you to customize also the Apex Planner Appointment form.
- Working day filter view will also be applicable to the Month view.