

Crowe Timesheets

For Microsoft Dynamics 365 Trial Setup



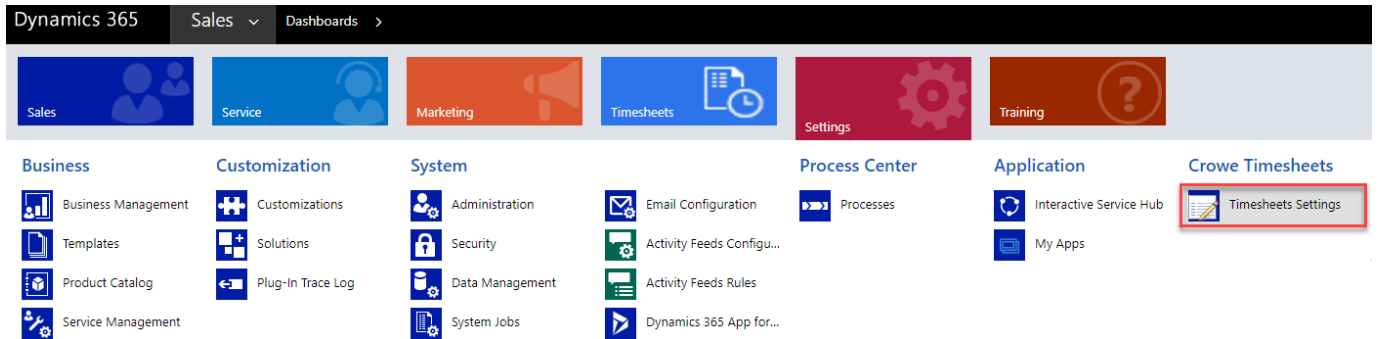
Certified for
Microsoft
Dynamics 365



Application Setup

Accepting the EULA

Go to Settings → Crowe Timesheets → **Timesheets Settings**



Accept the Agreement

Crowe Timesheets Software License Agreement

Read the license agreement and enter your contact information at the bottom

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Crowe Timesheets Settings

Crowe Timesheets Settings

Select the settings you want to apply to the system

Timesheet Settings

Timesheet Approval	Approve Timesheet Only ▼
First Week of the Year	First Day of the Year ▼
First Day of the Week	Sunday ▼
Show Billable Hours	Yes ▼

Time Entry Defaults

Time Entry Decimal Places	0 ▼
Default Billable	Yes ▼

Regarding Object Types

Available Types		Selected Types
<ul style="list-style-type: none">Bookable Resource BookingBookable Resource Booking HeaderCampaignCampaign ActivityContractEntitlementEntitlement TemplateInvoiceKnowledge Article	<ul style="list-style-type: none">>><<	<ul style="list-style-type: none">AccountCaseContactLeadOpportunityQuote

Timesheet Approval: when approving a Timesheet, you can decide if it also approves each individual time entry

First Week of the Year: used to determine the Week Numbers

First Day of the Week: the start of the week for the timesheet view

Show Billable Hours: show/hide the billable hours field

Time Entry Decimal Places: determines the numerical precision of time entry hours

Default Billable: with this set to yes, Billable Hours will be defaulted from Actual Hours

Regarding Object Types: select which entities you can record time against

Assign Security Roles

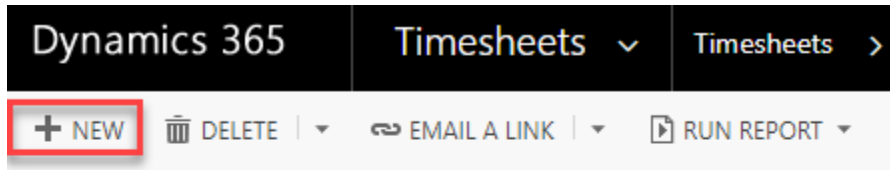
Go to Settings → Security → Users

Everyone you want to use Crowe Timesheets needs the **Crowe Timesheets User** role

Assign the **Crowe Timesheets Manager** role for users who should have the ability to approve Timesheets, add/edit Time Entry Categories, and view all Timesheet Events

Creating your first Timesheet

Go to Timesheets → Timesheets → New



My Active Timesheets

Name ↓	Owner ↑	Timesheet Status
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Select the week for which you want to enter time. It will default to the current week.

Create New Timesheet

Select the year and week for the new Timesheet.

Year: 2018

Week: Week 15 [4/8/2018 - 4/14/2018]

Enter the Information for the time you want to log.

NEW TIME ENTRY

Activity Date: 4/8/2018

Regarding*

Category

Subject*

Description

Actual (hrs)*

Billable (hrs)

NEW TIME ENTRY

Activity Date: 4/8/2018

Regarding*: Adventure Works (sample)

Category: Customer Support

Subject*: Needed help with software

Description: helped resolve license issue via WebEx

Actual (hrs)*: 1

Billable (hrs): 1

You can quickly add multiple time entries across various entities all from one convenient area for the entire week.

Dynamics 365 Timesheets > Timesheets > Week 15 [4/8/2018 - ... >

+ NEW DEACTIVATE APPROVE TIMESHEET SUBMIT TIMESHEET DELETE ASSIGN SHARE EMAIL A LINK

TIMESHEET : INFORMATION

Week 15 [4/8/2018 - 4/14/2018] Owner* Remy Timesheet Status Pending

		4/8 Sun	4/9 Mon	4/10 Tue	4/11 Wed	4/12 Thu	4/13 Fri	4/14 Sat	Actual	Billable
+ NEW TIME ENTRY REFRESH										
Regarding	Category									
Alpine Ski House (sample)	Administration		2	4					6	6
Patrick Sands (sample)	Consulting		1		6				7	7
Robin Counts (sample)	Consulting					3	2		5	5
Adventure Works (sample)	Customer Support	2							2	2
Totals:		2	3	4	6	3	2	0	20	20

Active

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