

## Customer Point of View/Portal User

ProjectSync 365



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## Introduction

This guide will walk you through registering for an account, signing in, and placing an order in the portal.

## Redeeming invitation code on the portal

### Email notification

- Open the email received containing the invitation code to redeem on your portal
- Click on the hyperlink provided in the email content.

Your Invitation Code to Redeem on Our Portal CRM:0261025 Tracked To Dyn... ✕

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 Kalle Aditya Sai Raj Reddy  
To:  Kalle Aditya Sai Raj Reddy

Hello Aditya Reddy,

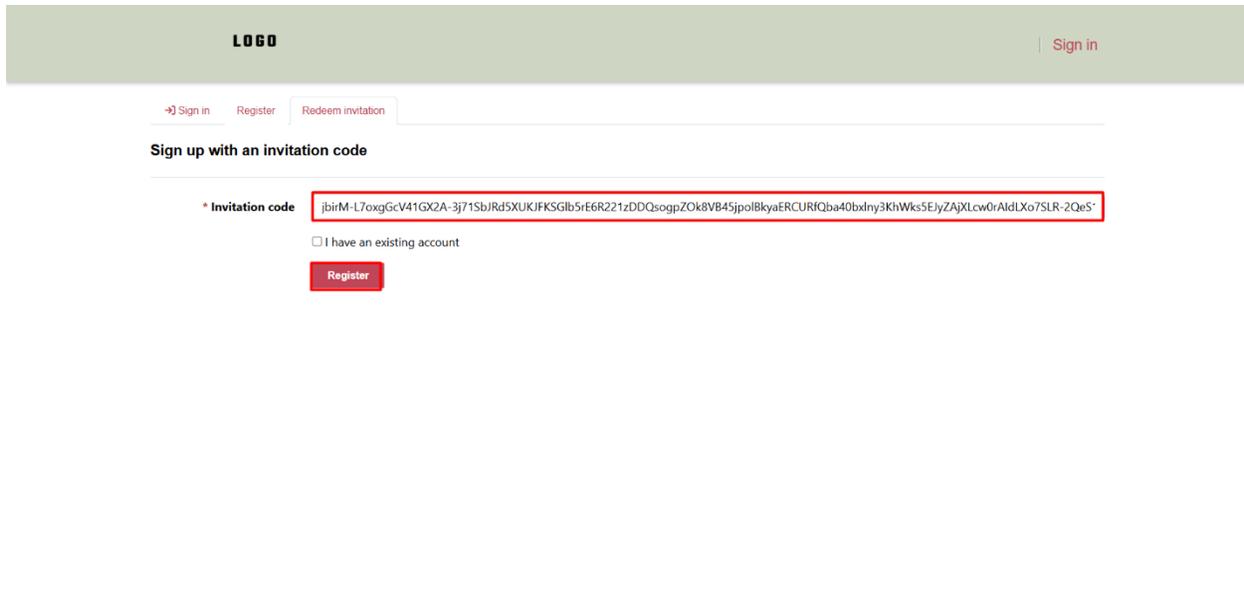
We are pleased to provide you with your unique invitation code.

Please [Click Here](#) to redeem you invitation to the portal.

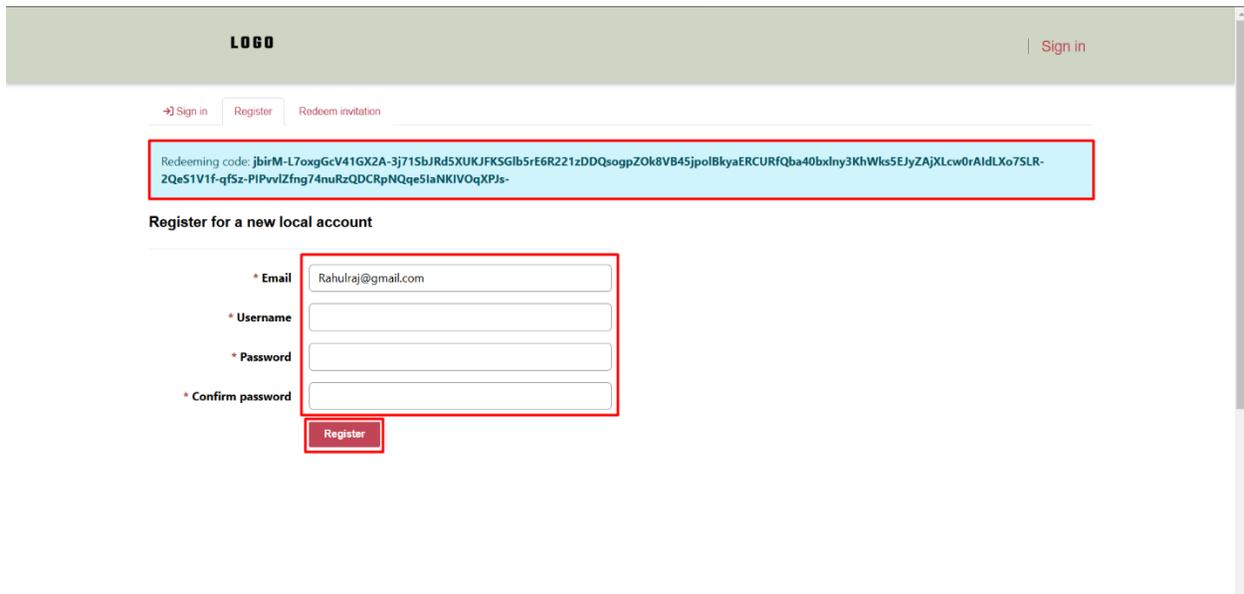
Best regards,  
Admin

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- You will be redirected to the Portal Redeem Invitation page with Invitation code filled automatically.



- Click on the **Register** button.
- You will be directed to the Registration Page. Your email ID will be auto populated once you have redeemed your invitation code.
- Fill in all the required fields and click on the **Register** Button.



- You will be logged in to the portal.

## Profile Page

- You can Update your Profile Section by clicking on the Username navigation item in the main menu and select Profile in Sub Menu.

- This is where you can view and update your personal information to ensure your account is complete and accurate.

Change password

Change email

Manage external authentication

🔔 Your email requires confirmation. Confirm Email

**Your information**

<b>First Name *</b> <input type="text" value="Rahul"/>	<b>Last Name *</b> <input type="text" value="Raj"/>
<b>E-mail</b> <input type="text" value="Rahulraj@gmail.com"/>	<b>Business Phone</b> <input type="text" value="Provide a telephone number"/>
<b>Organization Name</b> <input type="text"/>	<b>Title</b> <input type="text"/>
<b>Nickname</b> <input type="text"/>	<b>Web Site</b> <input type="text"/>
<b>Public Profile Copy</b> <div style="border: 1px solid #ccc; height: 20px;"></div>	
<b>Preferred Language</b> <input type="text" value="Select"/>	

**How may we contact you?** Select all that apply.

Email  
 Fax  
 Phone  
 Mail

Update

- If you update details and click on Update.
- Profile update success message will be displayed after clicking on Update button.

Change password

Change email

Manage external authentication

✔ Your profile has been updated successfully. ✕

**Your information**

<b>First Name *</b> <input type="text" value="Rahul"/>	<b>Last Name *</b> <input type="text" value="Raj"/>
<b>E-mail</b> <input type="text" value="Rahulraj@gmail.com"/>	<b>Business Phone</b> <input type="text" value="Provide a telephone number"/>
<b>Organization Name</b> <input type="text"/>	<b>Title</b> <input type="text"/>
<b>Nickname</b> <input type="text"/>	<b>Web Site</b> <input type="text"/>
<b>Public Profile Copy</b> <div style="border: 1px solid #ccc; height: 60px;"></div>	
<b>Preferred Language</b> <input type="text" value="Select"/>	

## Time Entry

- Now, Click on Time Entry navigation item in the main menu and select Time Entry in Sub Menu.

- Time entry
- Submitted Time Entry
- Approved Time Entry
- Rejected Time Entry

- You will be redirected to Time Entry Page and You can start submitting your Time Entries.

[+ Create](#)[Active Time Entries](#)[Search](#)

Project ▾

Project Task ▾

Role ▾

Entry Status ▾

Bookable Resource ▾

Date ↓ ▾

Duration ▾

Type ▾



No records to show

## Create a Time Entry

- Click on the Create button to create a Time Entry.

Project ▾ | Project Task ▾ | Role ▾ | Entry Status ▾ | Bookable Resource ▾ | Date ▾ | Duration ▾ | Type ▾



No records to show

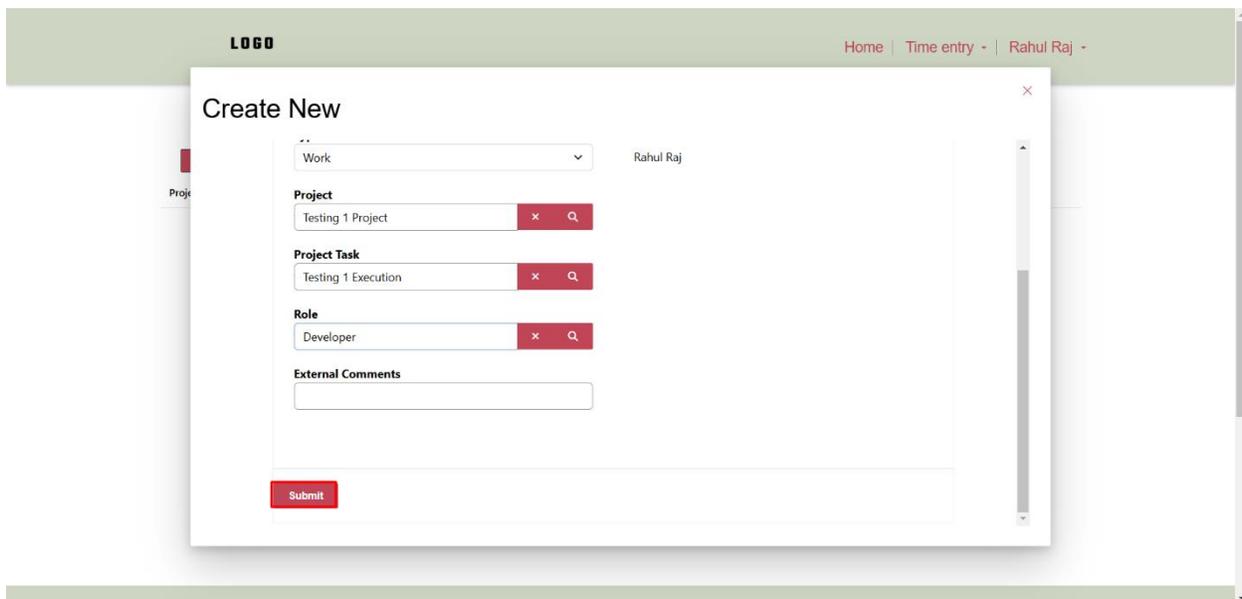
- Fill in the below required details in the form
  - o Date
  - o Duration
  - o Type
  - o Project
  - o Project Task
  - o Role
- **Note:** - Bookable Resource will be Auto Populated.

**Create New** ×

**General**

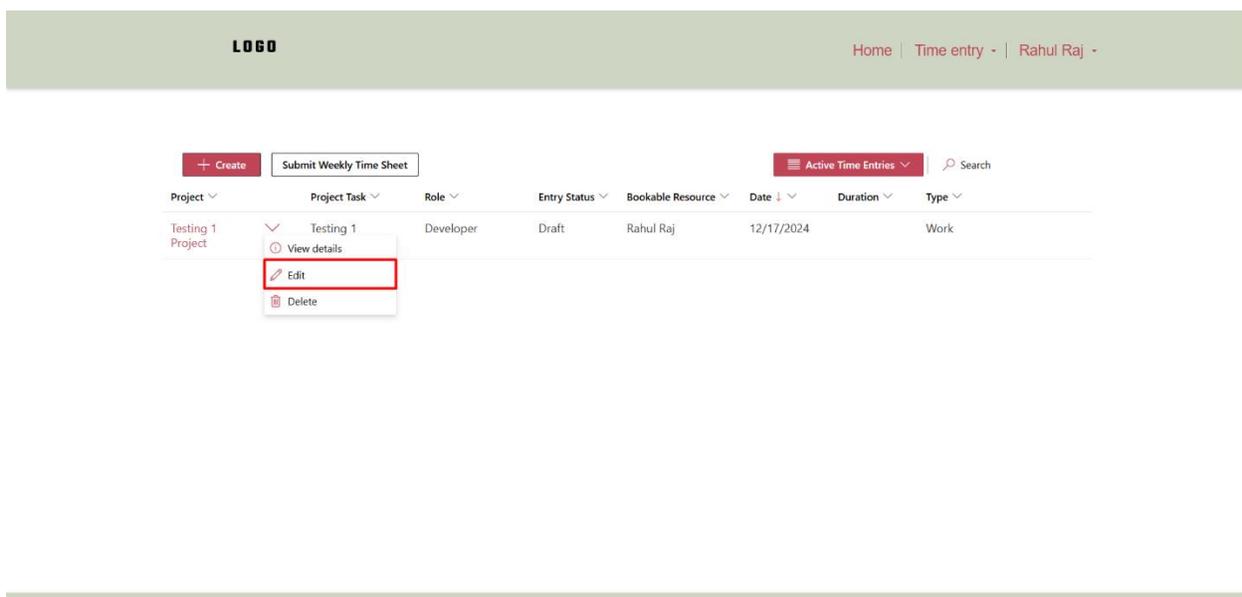
<p><b>Date *</b></p> <input type="text" value="M/D/YYYY"/>	<p><b>Description</b></p> <input type="text"/>
<p><b>Duration *</b></p> <input type="text"/>	<p><b>Bookable Resource</b></p> <input type="text" value="Rahul Raj"/>
<p><b>Type *</b></p> <input type="text" value="Work"/>	<p><b>Contact</b></p> <input type="text" value="Rahul Raj"/>
<p><b>Project</b></p> <input type="text"/>	
<p><b>Project Task</b></p> <input type="text"/>	
<p><b>Role</b></p> <input type="text"/>	

- Click on the Submit button.
- A time entry is successfully created once you submit the form.



## Edit a Time Entry

- Click on the dropdown menu of Time Entry Record.
- There will be 3 options: -
  - o View details – This option is used to view the Time Entry Record.
  - o Edit – This option is used to edit the Time Entry Record.
  - o Delete - This option is used to delete the Time Entry Record.
- Click on the Edit button.



- The Time Entry Edit Record will open.
- You can update the fields that require changes.
- Click on the Submit button.

**Edit record**

**General**

**Date \***  
12/17/2024

**Duration \***  
8 hours

**Type \***  
Work

**Project**  
Testing 1 Project

**Project Task**  
Testing 1 Execution

**Role**  
NewelInner

**Description**

**Bookable Resource**  
Rahul Raj

**Contact**  
Rahul Raj

## Submitting the Time Entries

- Once you have created all the Time Entries for the Week.
- Click on the Submit Weekly Time Sheet Button.

**Submit Weekly Time Sheet**

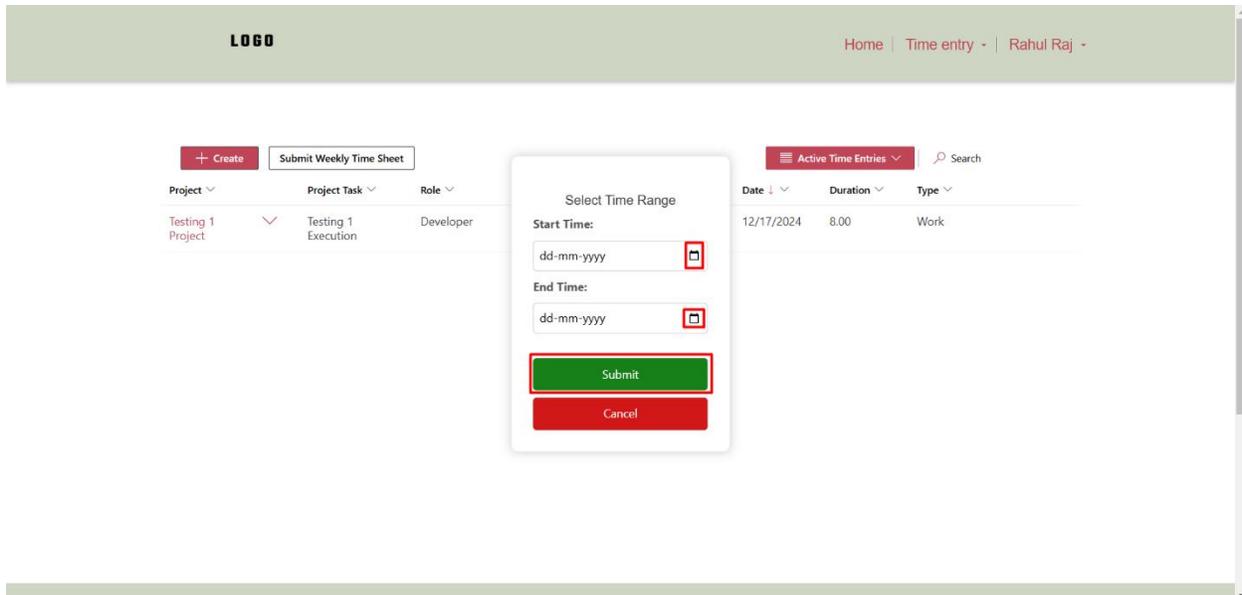
Project	Project Task	Role	Entry Status	Bookable Resource	Date	Duration	Type
Testing 1 Project	Testing 1 Execution	Developer	Draft	Rahul Raj	12/17/2024	8.00	Work

- A Time Entry pop up will appear you need to fill the Following details  
o Start of the Week Date i.e., Monday

End of the Week Date, i.e., Sunday.

o Click on the Submit Button.

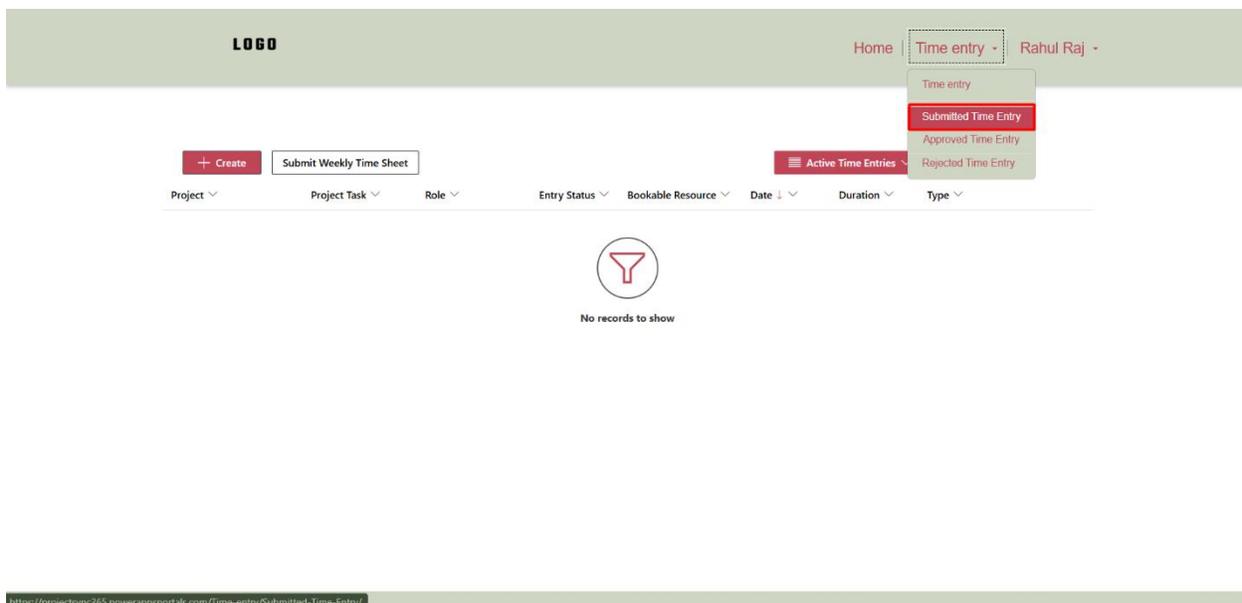
- A “Timesheet Submitted Successfully” Popup appears.



- The Page will refresh and will Submit the Time Entries.

## View Submitted Time Entry

- Click on Time Entry navigation item in the main menu and select Submitted Time Entry in Sub Menu.



- The Submitted Time Entries records will be present on this page.

LOGO Home | Time entry - | Rahul Raj -

Submitted Time Entries Search

Project	Project Task	Role	Entry Status	Bookable Resource	Date	Duration	Type
Testing 1 Project	Testing 1 Execution	Developer	Submitted	Rahul Raj	12/17/2024	8.00	Work

## View Approved Time Entry

- Click on Time Entry navigation item in the main menu and select Approved Time Entry in Sub Menu.

LOGO Home | Time entry - | Rahul Raj -

Time entry  
Submitted Time Entry  
Approved Time Entry  
Rejected Time Entry

Submitted Time Entries Search

Project	Project Task	Role	Entry Status	Bookable Resource	Date	Duration	Type
Testing 1 Project	Testing 1 Execution	Developer	Submitted	Rahul Raj	12/17/2024	8.00	Work

- The Approved Time Entries records will be present on this page.

Approved Time Entries Search

Project	Project Task	Role	Entry Status	Bookable Resource	Date	Duration	Type
Testing 1 Project	Testing 1 Execution	Developer	Approved	Rahul Raj	12/17/2024	8.00	Work

## View Rejected Time Entry

- Click on Time Entry navigation item in the main menu and select Rejected Time Entry in Sub Menu.

LOGO Home Time entry - Rahul Raj -

Time entry  
Submitted Time Entry  
Approved Time Entry  
Rejected Time Entry

Approved Time Entries Rejected Time Entry

Project	Project Task	Role	Entry Status	Bookable Resource	Date	Duration	Type
Testing 1 Project	Testing 1 Execution	Developer	Approved	Rahul Raj	12/17/2024	8.00	Work

<https://projectsync365.powerappsportals.com/Time-entry/Rejected-Time-Entry/>

- The Rejected Time Entries records will be present on this page.

Rejected Time Entries Search

Project ↑	Project Task ↓	Role ↓	Entry Status ↓	Bookable Resource ↓	Date ↓	Duration ↓	Type ↓
Testing 1 Project	Testing 1 Execution	Developer	Returned	Rahul Raj	12/17/2024	8.00	Work

## Re-Submitting Rejected Time Entry

- The Rejected Time Entry Status will be changed to Returned.
- To Resubmit the Rejected Time Entries, Click on Time Entry navigation item in the main menu and select Time Entry in Sub Menu.

Home Time entry - Rahul Raj -

Time entry  
Submitted Time Entry  
Approved Time Entry  
Rejected Time Entry

Rejected Time Entries Search

Project ↑	Project Task ↓	Role ↓	Entry Status ↓	Bookable Resource ↓	Date ↓	Duration ↓	Type ↓
Testing 1 Project	Testing 1 Execution	Developer	Returned	Rahul Raj	12/17/2024	8.00	Work

- The Entry Status of Rejected Time Entry will be Returned.
- Click on the dropdown menu of Time Entry Record and select Edit and make the changes in the form.

[+ Create](#) [Submit Weekly Time Sheet](#) [Active Time Entries](#) [Search](#)

Project	Project Task	Role	Entry Status	Bookable Resource	Date	Duration	Type
Testing 1 Project	Testing 1	Developer	Returned	Rahul Raj	12/17/2024	8.00	Work

[View details](#)  
[Edit](#)  
[Delete](#)

- After Editing the record Submit the Time Entry.
- Follow the Submitting Time Entries Steps to Submit the records.