



PRO Certification

**“Learn. Everything you can, anytime
you can, from anyone you can, there
will always come a time when you will
be grateful you did.”**

-Sarah Caldwell

YOUR PRESENTERS



Victoria Horn
TSheets Technical Lead



Kelly Bistriceanu
TSheets Accountant Program Director

THINGS TO KNOW AHEAD OF TIME

1. **Your TSheets PRO URL**

Don't have one? Sign up at tsheets.com/pros

2. **TSheets login and password**

Can't remember your password? Do a password reset

ABOUT TSHEETS

TSheets is a web-based employee time tracking & attendance software that employees **LOVE** ❤️



TSHEETS STORY

Founded in 2006 • Thousands of companies • 40 countries

100% year-over-year growth

Technology built around customer feedback



Matt Rissell
CEO

SO WHY ARE YOU HERE?

To get certified.

To figure out how TSheets can simplify your life.

To find out what pain points TSheets can solve for your clients.



THE BENEFITS OF BEING A TSHEETS CERTIFIED PRO

FREE TSheets account (for life)

Designated affiliate tracking URL

20% commission

10% discount


Escalated support


Business support

Marketing collateral

Fancy badges

QUICK RECAP OF TSHEETS

 Apps Articles Support



TSheets Time Tracker

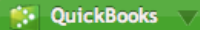
Mobile, GPS time tracking. Timesheets for fast, ,

★★★★★ (651 reviews)


By [TSheets](#)
Support

Share: [Twitter](#) [Facebook](#) [LinkedIn](#) [Google+](#)

[Write a review](#)
[Notify me of new reviews](#)

 QuickBooks

QuickBooks Integration Preferences

 **QuickBooks Integration**
Synchronize QuickBooks users, customers, jobs, service items seamlessly.

- Import
- Export All Approved Time
- View Sync Log
- Preferences
- Help


Connection details:

When we import your information from QuickBooks should we...

Employee Timesheets Should Show

- ☒ Customers & Jobs
- ☒ Service Items
- ☒ Billable yes/no choice
- ☒ Class

Exporting Time to QuickBooks

2001-01-01  Don't export timesheets prior to this date.

Time prior to this date will be ignored when exporting to QuickBooks.

NOTE: We only export up to 3 months of previous timesheets.

Other Options

- ☒ Import Vendors as Employees

STATUS: CONNECTED
(disconnect from QuickBooks)
Last sync: 82 minutes ago
qbia_online

Have Questions?
Read the [QuickBooks Integration Guide](#)
or [Contact Support](#).

LINKING TSHEETS WITH QBO

QuickBooks Integration Payroll Item Mappings

QuickBooks Payroll Item Mapping Tool

In order to export time, each user must have a default payroll item assigned for the class of time being exported. Click on a user below to expand the available choices for each class of time, and choose a payroll item that should be used for that time.

Your Payroll Items are setup to be assigned to Employees. (Change Settings)

Employee Map

— Banner, Bruce (bbanner) R:(none), O:(none), Sick:(none), Vacation:(none), Holiday:(none)

Regular	Overtime	Sick	Vacation
<input checked="" type="radio"/> None	<input checked="" type="radio"/> None	<input checked="" type="radio"/> None	<input checked="" type="radio"/> None
<input type="radio"/> Overtime	<input type="radio"/> Overtime	<input type="radio"/> Overtime	<input type="radio"/> Overtime
<input type="radio"/> Vacation	<input type="radio"/> Vacation	<input type="radio"/> Vacation	<input type="radio"/> Vacation
<input type="radio"/> PTO	<input type="radio"/> PTO	<input type="radio"/> PTO	<input type="radio"/> PTO
<input type="radio"/> Salary	<input type="radio"/> Salary	<input type="radio"/> Salary	<input type="radio"/> Salary
<input type="radio"/> Hourly	<input type="radio"/> Hourly	<input type="radio"/> Hourly	<input type="radio"/> Hourly

Holiday

☒ None

☐ Overtime

QuickBooks Payroll Item Mapping Tool

In order to export time, each user must have a default payroll item assigned for the class of time being exported. Click on a user below to expand the available choices for each class of time, and choose a payroll item that should be used for that time.

Your Payroll Items are setup to be assigned to Employees. Override by Customer also allowed.

☒ Associate Payroll Items with Employees

When you choose this option, you may assign a different Payroll Item with each class of time for a given employee (i.e. Regular, Overtime). The time is automatically associated with the correct Payroll Item when it is exported to QuickBooks.

☒ Allow override of Employee Payroll Items by Customer, Service Item, or Class

If you need to enforce the use of certain Payroll Items for Customers or Service Items, you can turn this on. Payroll Items to associate with those specific Customers or Service Items or Classes.

☐ Let Employees choose Payroll Items during time entry

When you choose this option, all employees will be required to select a Payroll Item whenever they enter time into the system. Only select this option if you are sure that your employees have the need to select Payroll Items themselves.

Done with Settings

PREFERENCES AND DIFFERENCES BETWEEN QBO & QBD

Employee Editor

General Permissions Jobs / Projects PTO Codes Overtime

User Type: Custom

- ☐ Account Management
- ☒ Mobile time entry
- ☒ See "Who's Working" for entire company
- ☐ Manage My Timesheets
- ☐ View Timesheet Reports for All Employees
- ☐ Approve Timesheets for All Employees
- ☐ Manage Timesheets for All Employees
- ☐ Manage Authorization
- ☐ Manage User Accounts
- ☐ Manage Job Codes for Company

Cancel Save

Job Code Management

Add a Top Level Job Code

Name: Job Code Assignments

Short Code:

☒ Assign to Everyone

☐ Billable

Move Duplicate

Cancel Save

Smith Family

Somoza Foundation

Wilson House

Manage PTO codes Import / Export

EMPLOYEE MANAGEMENT DETAILS

The screenshot displays the TSheets Employee Management interface. The browser address bar shows the URL https://imadethat.tsheets.com/#w_job_codes. The user is logged in as Agent Smith.

PTO Accrual Settings Panel:

- Apply these Accrual Settings**
- WARNING:** Applying new accrual settings will erase the settings for all employees and replace them with the new settings.
- Select Users**
Apply to Groups / Employees: (all employees)
Note: Changes are made to active employees only
- Accrual Type**
Select Accrual Type: Accrue every Pay Period
Accruals will take place 5 days after the end of each pay period
- Hours Settings**
Hours per Year: [] hrs
Use it or lose it: ☐
- Accrual Date Settings**
Reset yearly balance on (only if use it or lose it is checked):
☒ Hire Date
☐ Dec 13
☐ Don't begin accruals until []
☐ Grant [] hours of time on []
- Balance Settings**
Max Balance Limit: 0 enter '0' for no limit
☐ Allow a Negative Balance

Employee List Panel:

Username	First Name	Last Name
agents	Agent	Smith
charlieb	Charlie	Brown
homers	Homer	Simpson
jacks	Jack	Sparrow
jamesb	James	Bond
lucyr	Lucy	Ricardo
maryp	Mary	Poppins
peterp	Peter	Parker
srogers	Steve	Rogers
suzieq	Suzie	Queue

Job Code Management Panel:

- Add a Top Level Job Code
- Cudworth Group
- DeWebber Association
- Hendershot Organization
- Job Code Assignments
- Jones & Co.
- Reeder and Associates
- Smith Family
- Somoza Foundation
- Wilson House

Employee Editor Panel:

- General | Permissions | Jobs / Projects | PTO Codes | Overtime
- ☒ Bereavement: Personalize Accruals, Accrual Ledger, Balance: 0 hours
- ☒ Holiday: Personalize Accruals, Accrual Ledger, Balance: 32 hours
- ☒ Maternity Leave: Personalize Accruals, Accrual Ledger, Balance: 480 hours
- ☒ Sick: Personalize Accruals, Accrual Ledger, Balance: 80 hours
- ☒ Vacation: Personalize Accruals, Accrual Ledger, Balance: 60.99 hours
- ☒ Well Days: Personalize Accruals, Accrual Ledger, Balance: 111.53 hours

Who's Working? Panel:

- No employees working
- Agent Smith
- Charlie Brown
- Homer Simpson
- Jack Sparrow
- James Bond
- Lucy Ricardo
- Mary Poppins
- Peter Parker
- Steve Rogers
- Suzie Queue

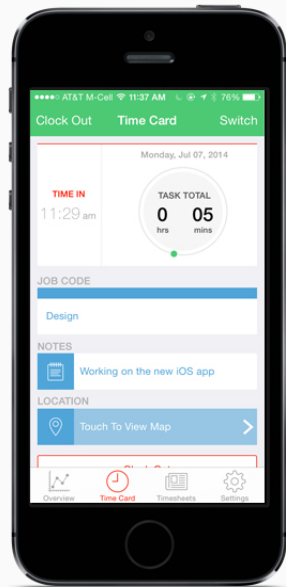
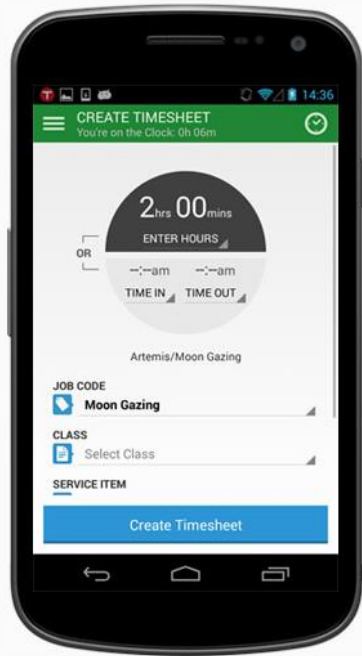
Configure Bereavement Accruals Panel:

- Apply New Settings
- Download Settings
- Upload New Settings
- Manage Email Subscriptions
- Managers may view PTO Ledger
- Managers may adjust PTO Ledger
- Delete PTO Accrual Ledgers for PTO Code: Bereavement

Footer:

help | Tell a Friend | Feature Request | Bug Report | Testimonial | Contact us | 888-836-2720 | Privacy Policy | ©2014 TSheets

EXPANDED WAYS OF TRACKING TIME



Works on Any Device

Edit Time

Ok! Clocked-in under marketing

Day total: 0:00
Week total: 4:27

Shift total: 3:21
Job: Marketing

Day total: 3:21
Week total: 5:21
Notes: no notes

T in marketing

T status

You Pick Your "Text-To"
Phone Number

Clock In a Crew

GPS LOCATIONS

TSHEETS :: Map
https://imadethat.tsheets.com/#w_tbox

05:12:28 PM

Agent Smith
Account | Logout

My Menu
Agent Smith (agents)
My Time Card
Manual Time Card
Paid Time Off
Reports
Who's Working
Manage Timesheets
Manage Employees
Manage Job Codes
Manage Authorization
My Profile
Company Settings
Logout
Add-Ons
Toodledo
Text Messaging
Approvals
Submit Time
Invoicing
Schedule (beta)
Dial-In
Support
User Guide
News & Updates
Status Page

I Made That
Manage Timesheets
Timesheet List
Time Slider
Timesheet Edits
Timesheets (635)

Map

Day Time In Oct

Day	Time In	Time Out	Day
Wed	Oct 22, 12:05pm		Oct
Wed	Aug 13, 2:02pm		Aug
Wed	Aug 6, 7:51am		Aug
Fri	Aug 1, 9:45am		Aug
Fri	Aug 1, 6:10am		Aug
Thu	Jul 31		man
Wed	Jul 30		man
Wed	Jul 30		man
Tue	Jul 29		man
Tue	Jul 29		man
Mon	Jul 28		man
Mon	Jul 28		man
Mon	Jul 28		man
Fri	Jul 25		man
Thu	Jul 24		man
Wed	Jul 23		man
Tue	Jul 22		man
Tue	Jul 22		man
Mon	Jul 21		man
Mon	Jul 21		man

Map data ©2014 Google Terms of Use Report a map error

1 2 3 4 5 6 7 8 9 10 Next

help

Table:

ID#	Location	Notes
	(San Jose, CA)	
	TSheets Office	
	TSheets iPhone App	Picking up suppli...
	TSheets iPhone App	Long day!
	TSheets Office	
	TSheets Office	
99375	TSheets Office	
ic Projects	TSheets Office	
	TSheets Office	
	TSheets Office	
	TSheets Office	
ic Projects	TSheets Office	
tract 99336	TSheets iPhone App	
ic Projects	TSheets Office	
	TSheets Office	
	TSheets Office	
ic Projects	TSheets	
	TSheets	

Map

Report errors in the road map or imagery to Google

Map Satellite

Aug 6, 8:04am
Source: gps
Accuracy: 10m

Aug 6, 8:18am
Source: gps
Accuracy: 5m

Aug 6, 8:41am
Source: gps
Accuracy: 5m

Map data ©2014 Google Imagery ©2014 TerraMetrics Terms of Use Report a map error

DETAILED LOOK AT MOBILE APPS

The screenshot displays the 'Employee Editor' application window. It features a tabbed interface with 'General', 'Permissions', 'Jobs / Projects', 'PTO Codes', and 'Overtime' tabs. The 'General' tab is active, showing fields for 'First Name' (Homer), 'Last Name' (Simpson), 'Username' (homers), 'New password' (with a minimum 7-character requirement), 'Email', 'Employee #', 'Cell Number', 'Payroll ID', 'Hire Date', 'Pay Rate' (\$0.00 per hour), and 'Salaried' status (Yes/No). A dropdown menu for 'Group' is open, listing 'None', 'Customer Service', 'HR' (selected), 'Internal Administration', 'Research and Development', and 'Sales'. A 'Manage Groups' dialog box is overlaid on the right, titled 'Managers of the "HR" Group:'. It contains a text input field 'Type Manager's Name', an 'Add Manager' button, and a list of managers: 'Agent Smith' and 'Suzie Queue'. A 'Return to Group List' button is at the bottom right of the dialog. The main window has 'Cancel' and 'Save' buttons at the bottom right.

Employee Editor

General | Permissions | Jobs / Projects | PTO Codes | Overtime

First Name: Homer

Last Name: Simpson

Username: homers

New password:
minimum 7 characters, and must have 2 of the following: (upper, lower, numbers, symbols)

(again):

☐ Require password change at next web login

Email:

Employee #:

Cell Number:

Payroll ID:

Hire Date:

Pay Rate: \$ 0.00 per hour

Salaried: ☐ Yes ☐ No

Exempt:
None
Customer Service
HR
Internal Administration
Research and Development
Sales

Manage Groups

Managers of the "HR" Group:

Type Manager's Name

☐ Agent Smith

☐ Suzie Queue

EXPANDED LOGGING & AUDITING METHODS

Timesheet Edits

Total

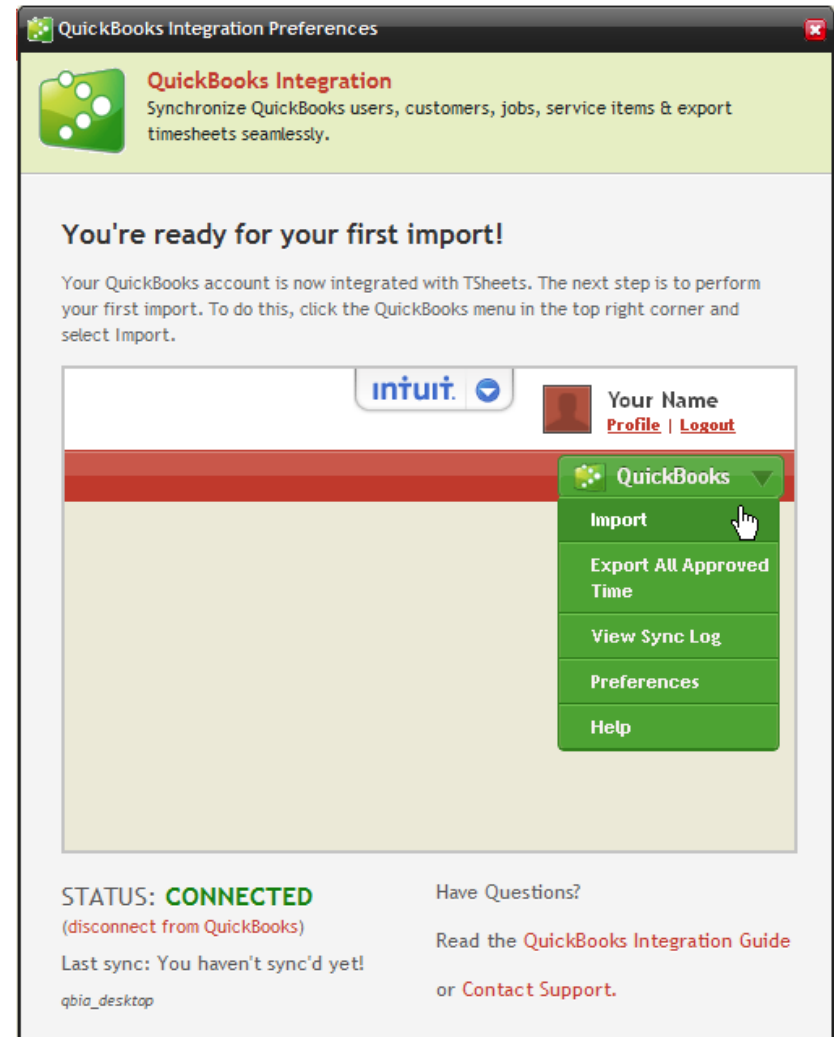
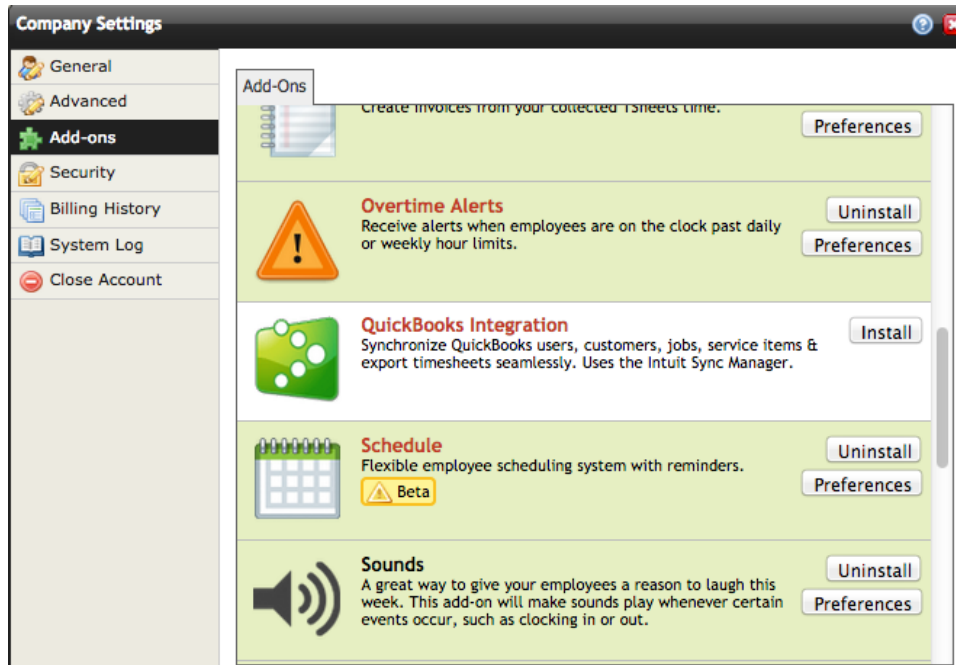
Timesheet History (163329396), USER: Agent Smith (agents)		
Time	User	Log Message
Aug 6, 6:52am	Agent Smith (agents)	(api) Created new timesheet for agents. Clock-in: Aug 6, 7:51am Total time: -- :-- (still working)
Aug 6, 7:03am	Agent Smith (agents)	(api) Updated agents's timesheet (id:163329396)
Aug 6, 7:03am	Agent Smith (agents)	(api) Update detail: Updated timesheet notes (now 33 characters)
Aug 6, 7:41am	Agent Smith (agents)	(api) Updated agents's timesheet (id:163329396)
Aug 6, 7:41am	Agent Smith (agents)	(api) Update detail: Employee has been clocked-out at "Aug 6, 8:41am" Total time: 0:49

7:00	Agent	Smith	Job Code Assignments	TSheets Office
8:00	Agent	Smith	Wilson House	TSheets Office

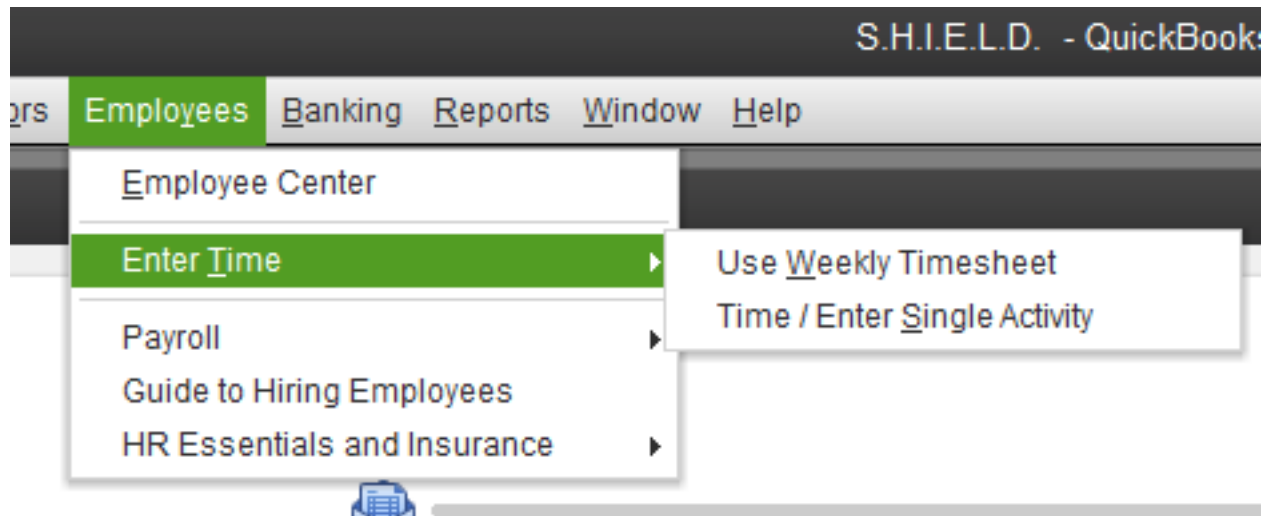
Paid Time Off	Timesheets (635)
Reports	Commonly Used
Who's Working	Payroll
Manage Timesheets	Logging and Auditing
Manage Employees	System Log
Manage Job Codes	Time Log
Manage Authorization	PTO Balances
My Profile	Approvals History
Company Settings	Exports
Logout	Tracking
	Exceptions

Mon Jul 28 manual entry

ACCOUNT ADD-ONS TO CUSTOMIZE



IN-DEPTH REPORTING & EXPORTING



Weekly Timesheet

Previous Next Print Edit Single Activity

Timesheet NAME: Anthony Stark WEEK OF: Aug 11 to Aug 17, 2013

CUSTOMER:JOB	SERVICE ITEM	PAYROLL ITEM	NOTES	CLASS	SU 11	M 12	TU 13	W 14	TH 15	F 16	SA 17	TOTAL	BILLABLE?	
Avengers Assemble	Activity	Salary	Meeting and negotiations.	Field Work						6:00		6:00	<input type="checkbox"/>	
Avengers Assemble	Activity	Salary	Meeting and negotiations.	Field Work						2:00		2:00	<input type="checkbox"/>	
Avengers Initiative:...	Caped Crusading	Salary		Field Work		8:00						8:00	<input checked="" type="checkbox"/>	
Avengers Initiative:...	Caped Crusading	Salary		High Risk Work			10:00					10:00	<input checked="" type="checkbox"/>	
NSA:Watchdog Ser...	Security Detail	Salary		Field Work				4:00				4:00	<input checked="" type="checkbox"/>	
Stark Industries:Wa...	Research & Develo...	Salary		Lab Work					12:00			12:00	<input type="checkbox"/>	
Totals						0:00	8:00	10:00	4:00	12:00	8:00	0:00	42:00	

☒ Wrap text in Notes field

Copy Last Sheet Save & Close Save & New Revert

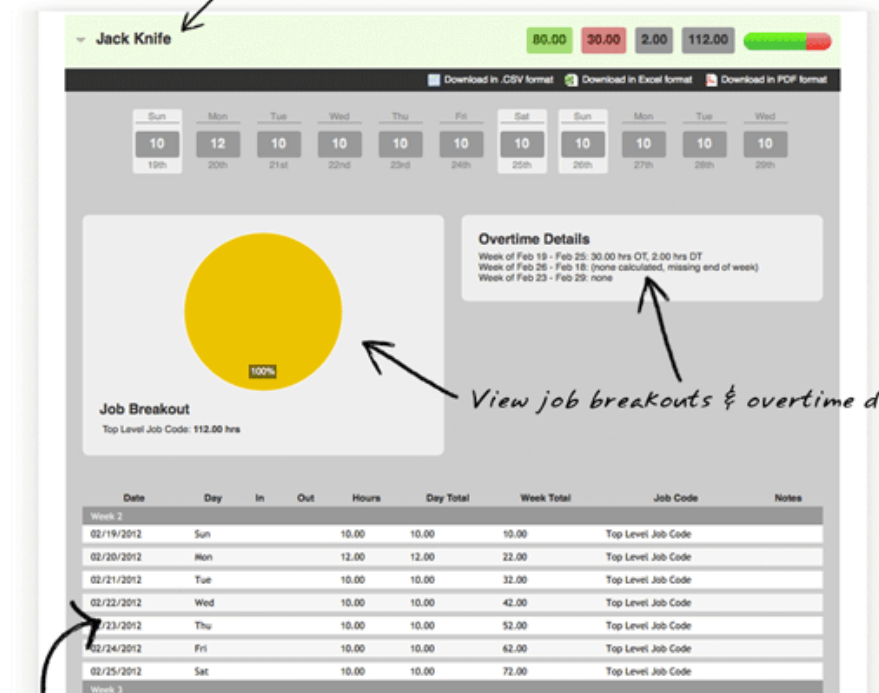
IN-DEPTH REPORTING & EXPORTING



View report totals at a glance

Quickly see overtime and paid time off

Click an employee's name to view more details



View job breakouts & overtime details

View time details by day

IN-DEPTH REPORTING & EXPORTING



WHO'S A GOOD FIT FOR TSHEETS

Our Top Industries



**ACCOUNTING &
TAX SERVICES**



CONSTRUCTION



LANDSCAPING



**SMALL
BUSINESS**

TOP REASONS A BUSINESS WOULD AUTOMATE TIME TRACKING.



CONVERSATIONS TO LISTEN FOR

“Payroll takes so long”

“My employees never turn their time cards in on time”

“I have employees in the field”

“My employees go into remote areas”

“I’ve been audited” (DOL)

“I work with government contracting” (DCAA)

“I need easy time tracking that works with my QuickBooks file”

“I’ve had bad experience with 3rd party app customer support in the past”

“I’m not really a tech person”

HOW TO REFER A CLIENT

Use your affiliate link

How to start a trial

**Post trial support process
from TSheets**

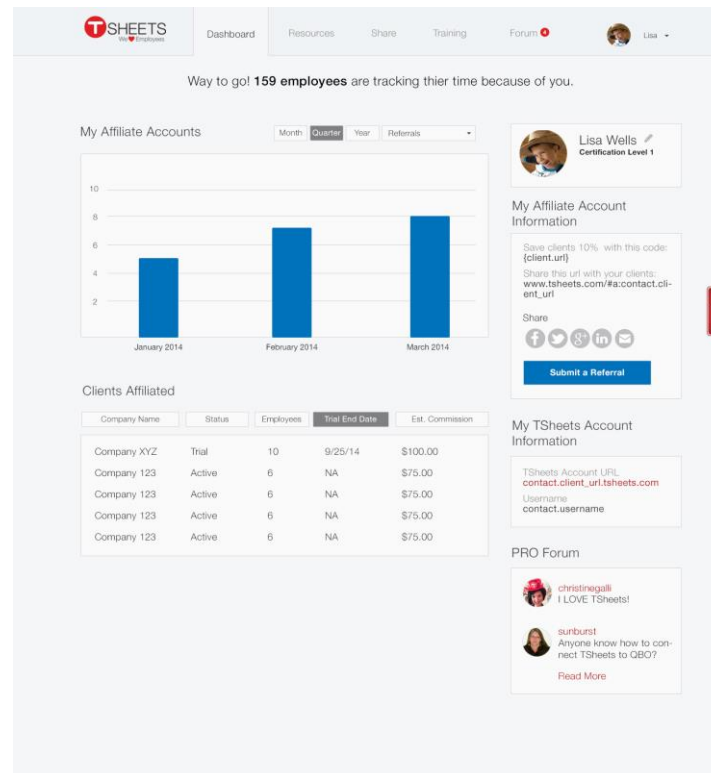
SO NOW WHAT?

Top 5 Behaviors of a Successful TSheets PRO

- 1. Know your affiliate link and login info by heart. Always have it ready to share.**
- 2. Connect with TSheets Socially (@tsheets on Twitter and tsheets.com on Facebook)**
- 3. Share your affiliate link everywhere (on your social outlets, in your email signature)**
- 4. Create a partners page on your website that drives traffic to your TSheets affiliate link.**
- 5. Download and install the TSheets app on your mobile device – show everyone how easy it is!**

COMING TO THE PRO PROGRAM IN 2015

**PRO Portal • TSheets Badass Awards • TSheets Council
TSheets Loyalty Rewards**





WE'RE HERE FOR YOU!

888.836.2720

prosupport@tsheets.com