



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



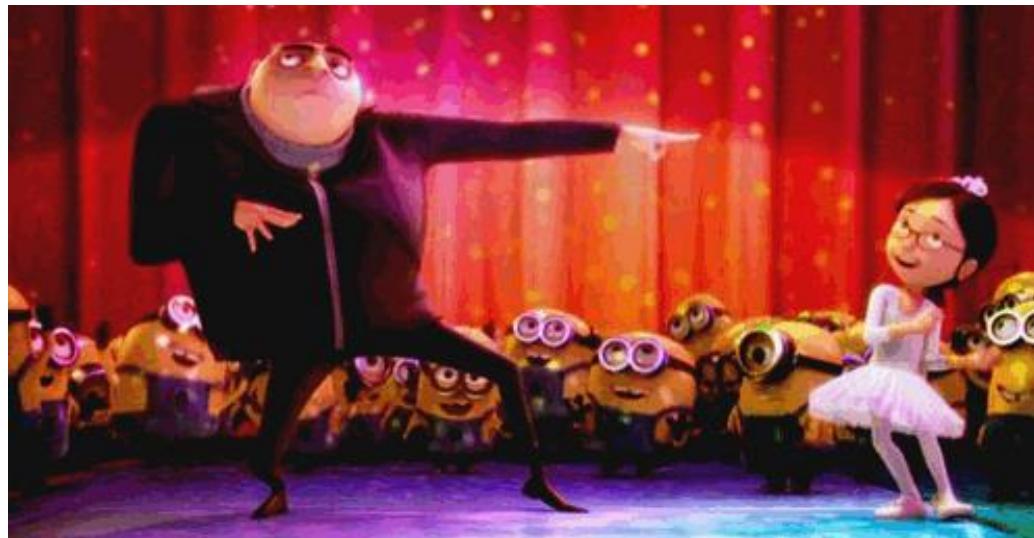
Matt Rissell
CEO

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

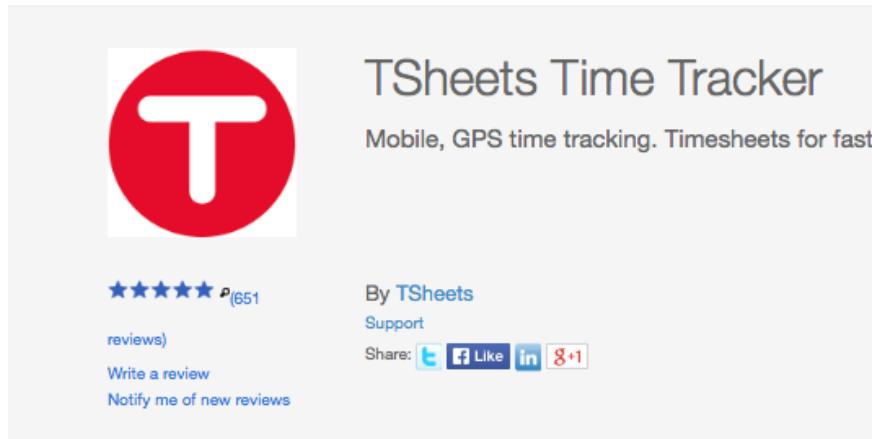
Escalated support

Business support

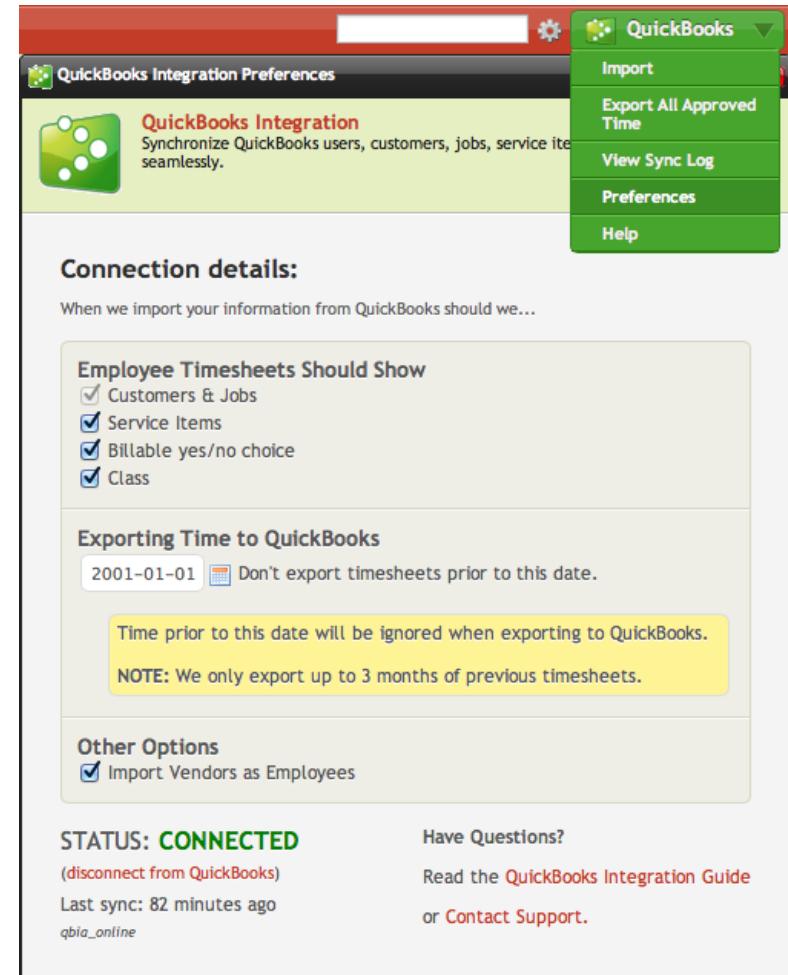
Marketing collateral

Fancy badges

QUICK RECAP OF TSHEETS

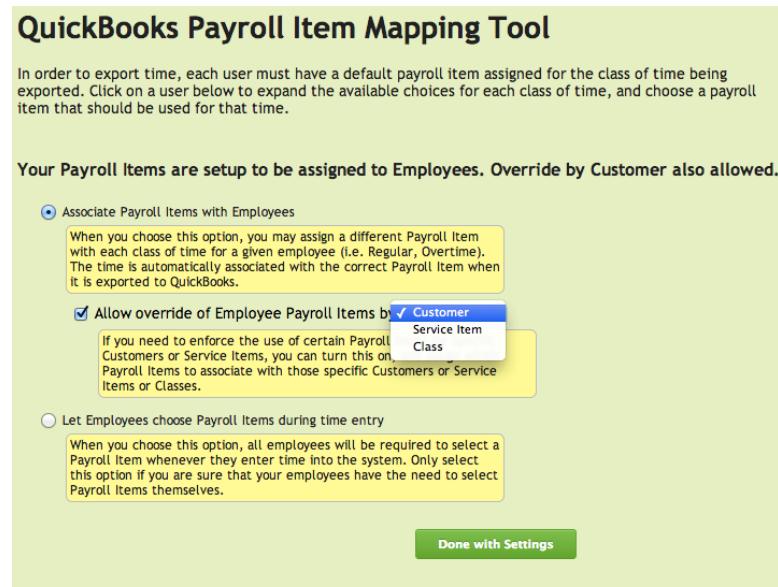
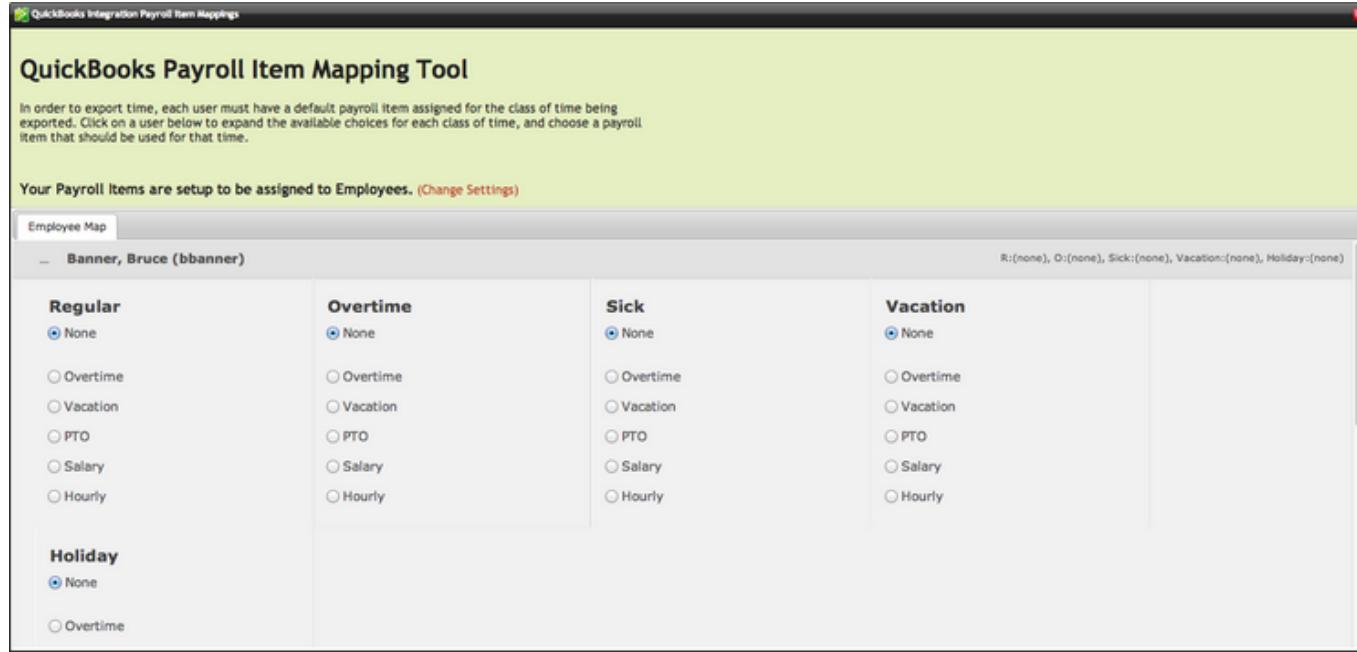


The image shows the TSheets Time Tracker app page on the QuickBooks Apps store. The app icon is a red circle with a white 'T'. The title is 'TSheets Time Tracker'. Below the title, it says 'Mobile, GPS time tracking. Timesheets for fast, accurate pay'. The app has a 5-star rating with 651 reviews. It is developed by 'TSheets'. There are links for 'Support' and 'Share' with social media icons for Twitter, Facebook, LinkedIn, and Google+. There are also buttons for 'Write a review' and 'Notify me of new reviews'.

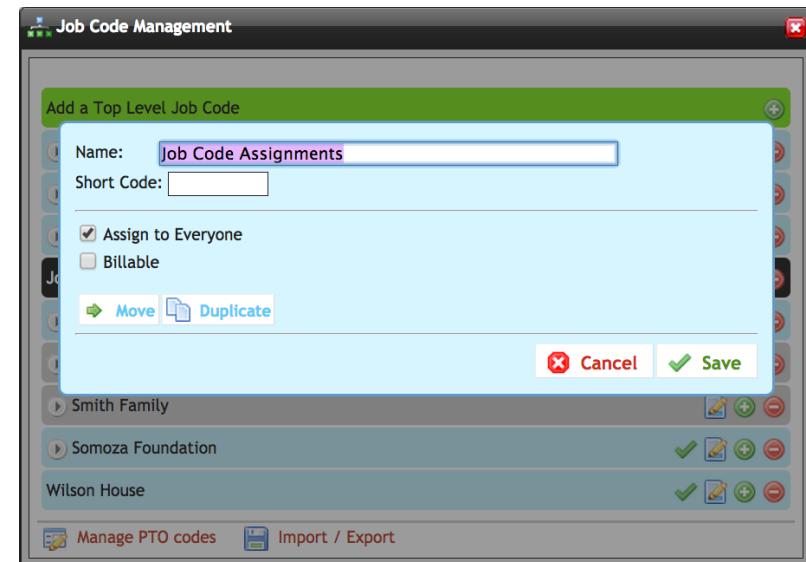
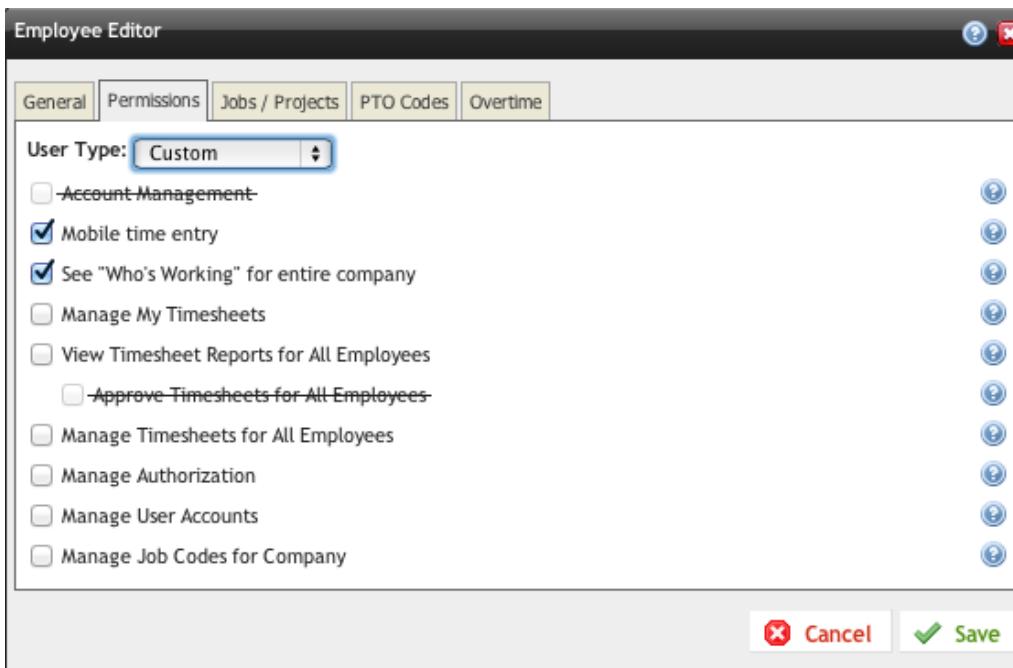


The image shows the 'QuickBooks Integration Preferences' window. The left sidebar has a 'QuickBooks' icon and a gear icon. The main content area shows the 'QuickBooks Integration' section with the sub-section 'Synchronize QuickBooks users, customers, jobs, service items, and more seamlessly.' Below this is a 'Connection details:' section with the sub-section 'When we import your information from QuickBooks should we...'. It contains a list of checkboxes for 'Employee Timesheets Should Show': 'Customers & Jobs' (checked), 'Service Items' (checked), 'Billable yes/no choice' (checked), and 'Class' (checked). There is also a section for 'Exporting Time to QuickBooks' with a date field set to '2001-01-01' and a note: 'Don't export timesheets prior to this date.' A note below says 'Time prior to this date will be ignored when exporting to QuickBooks.' A yellow box contains the note 'NOTE: We only export up to 3 months of previous timesheets.' At the bottom, there is an 'Other Options' section with a checked checkbox for 'Import Vendors as Employees'. At the very bottom, there is a 'STATUS: CONNECTED' section with a 'Disconnect from QuickBooks' link, a 'Last sync: 82 minutes ago' message, and a 'qbia_online' status. There is also a 'Have Questions?' section with links to the 'QuickBooks Integration Guide' and 'Contact Support'.

LINKING TSHEETS WITH QBO



PREFERENCES AND DIFFERENCES BETWEEN QBO & QBD



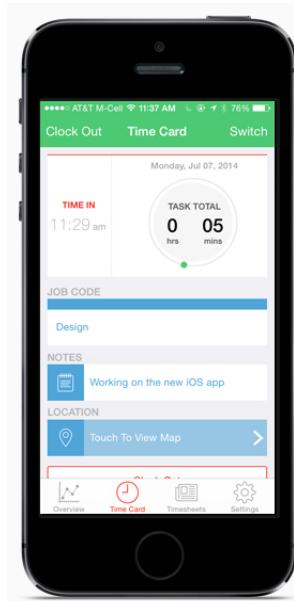
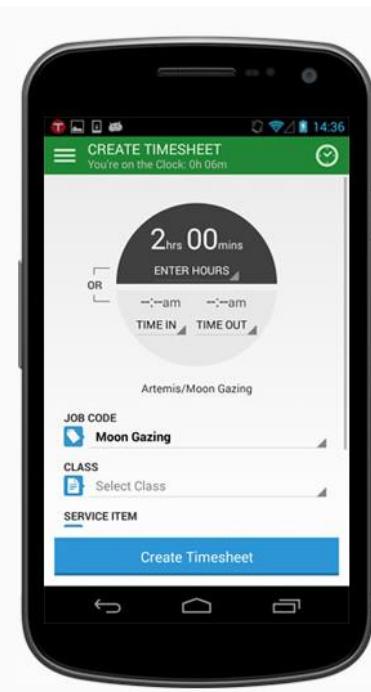
EMPLOYEE MANAGEMENT DETAILS

The screenshot displays the TSheets Job Code Management interface with the following components:

- PTO Accrual Settings (Left Panel):** A modal window for applying new accrual settings. It includes a warning message: "WARNING: Applying new accrual settings will erase the settings for all employees and replace them with the new settings." It has sections for "Select Users" (with a note: "Apply to Groups / Employees: (all employees) Note: Changes are made to active employees only"), "Accrual Type" (set to "Accrue every Pay Period"), "Hours Settings" (Hours per Year: 1700 hrs), "Accrual Date Settings" (Reset yearly balance on: Hire Date, Dec 13), and "Balance Settings" (Max Balance Limit: 0). Buttons for "Cancel" and "Apply" are at the bottom.
- Employee List (Top Center):** A table showing active employees (10): 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), and suzieq (Suzie Queue).
- Job Code Management (Center):** A window for managing job codes. It shows a list of top-level job codes: Cudworth Group, DeWebber Association, Hendershot Organization, Jones & Co., Reeder and Associates, Smith Family, Somoza Foundation, and Wilson House. It includes buttons for "Add a Top Level Job Code" and "Manage PTO codes".
- Who's Working? (Right Panel):** A list of employees currently working: Agent Smith, Charlie Brown, Homer Simpson, Jack Sparrow, James Bond, Lucy Ricardo, Mary Poppins, Peter Parker, Steve Rogers, and Suzie Queue.
- Employee Editor (Bottom Center):** A modal window for editing employee details. It shows tabs for General, Permissions, Jobs / Projects, PTO Codes, and Overtime. The PTO Codes tab lists Bereavement, Holiday, Maternity Leave, Sick, Vacation, and Well Days with their respective balances (0 hours, 32 hours, 480 hours, 80 hours, 60.99 hours, 111.53 hours). Buttons for "Manage PTO codes", "Cancel", and "Save" are at the bottom.
- Configure Bereavement Accruals (Bottom Right):** A modal window for managing Bereavement accruals. It includes buttons for "Apply New Settings", "Download Settings", "Upload New Settings", and "Manage Email Subscriptions". It also lists "Managers may view PTO Ledger", "Managers may adjust PTO Ledger", and a note: "Delete PTO Accrual Ledgers for PTO Code: Bereavement".

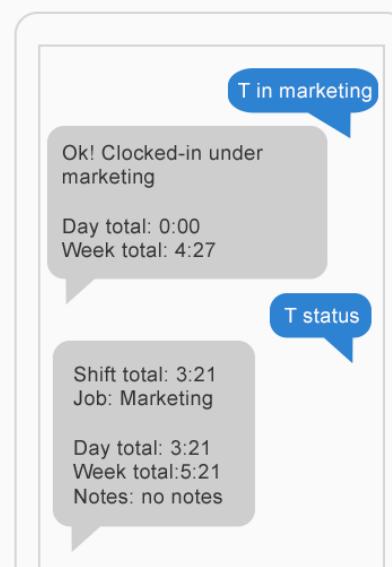
help

EXPANDED WAYS OF TRACKING TIME



Works on Any Device

Edit Time



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

[Add new timesheet](#)

I Made That

Manage Timesheets

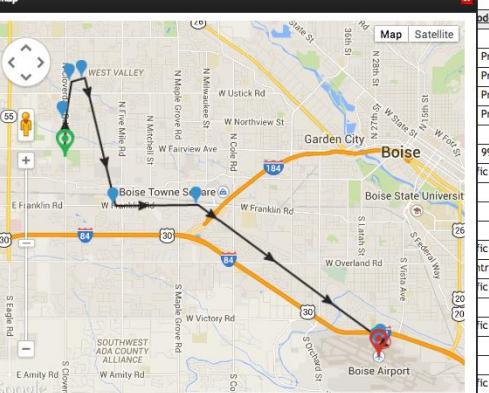
Timesheet List Time Slider Timesheet Edits

Timesheets (635)

Day Time In

Day	Time In	Day	Time In
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



Map Satellite

Map data ©2014 Google

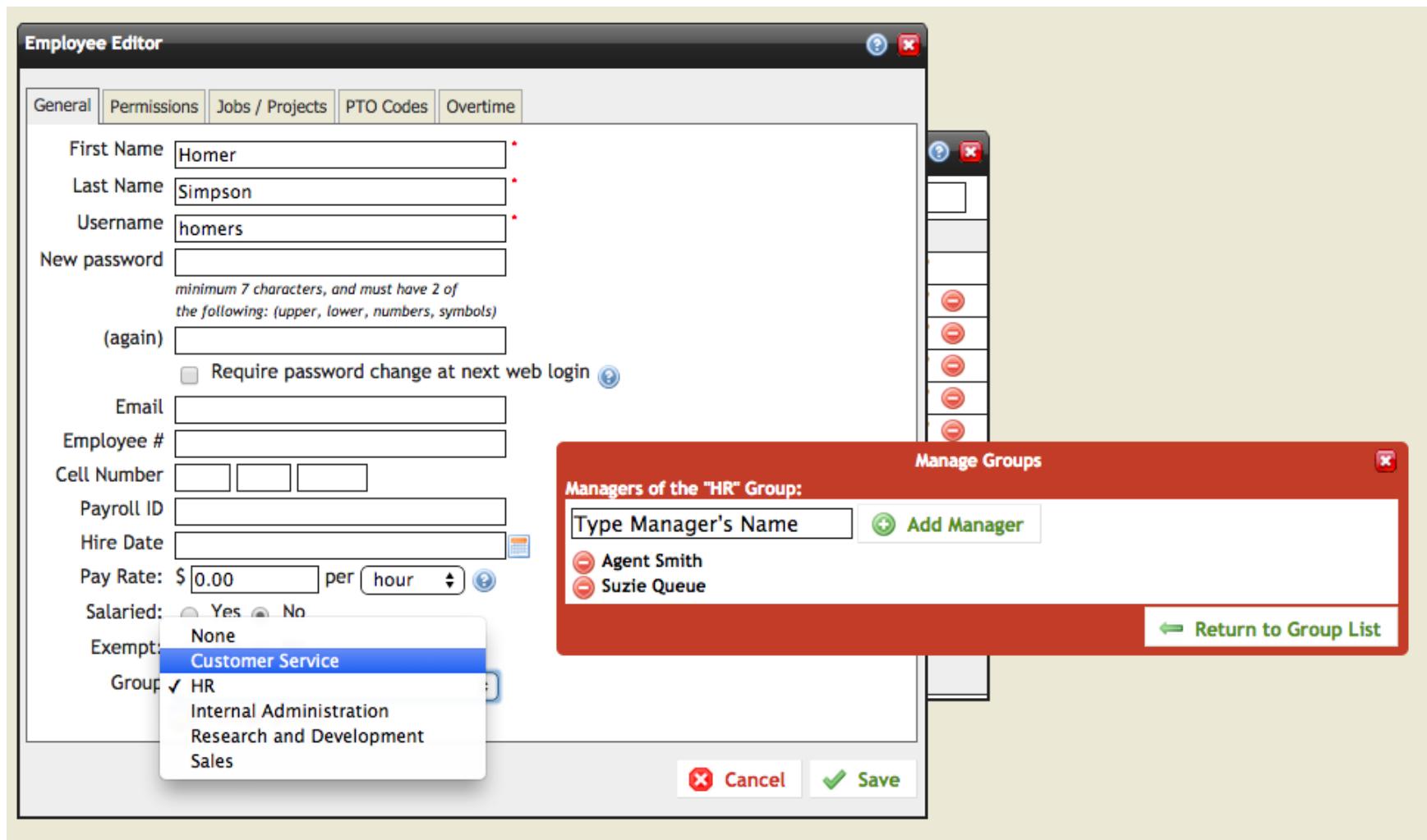
Report errors in the road map or imagery to Google

Map Satellite

Map data ©2014 Google Imagery ©2014 TerraMetrics

Terms of Use Report a map error

DETAILED LOOK AT MOBILE APPS



EXPANDED LOGGING & AUDITING METHODS

Timesheet Edits

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

2:00 Agent Smith Wilson House TSheets Office

Paid Time Off

Reports

Who's Working

Manage Timesheets

Manage Employees

Manage Job Codes

Manage Authorization

My Profile

Company Settings

Logout

Timesheets (635)

- + Commonly Used
- + Payroll
- Logging and Auditing

System Log

- Time Log
- PTO Balances
- Approvals History

- + Exports
- + Tracking
- + Exceptions

Map manual entry

ACCOUNT ADD-ONS TO CUSTOMIZE

Company Settings

Add-ONS

Create invoices from your collected TSheets time. [Preferences](#)

Overtime Alerts
Receive alerts when employees are on the clock past daily or weekly hour limits. [Uninstall](#) [Preferences](#)

QuickBooks Integration
Synchronize QuickBooks users, customers, jobs, service items & export timesheets seamlessly. Uses the Intuit Sync Manager. [Install](#)

Schedule
Flexible employee scheduling system with reminders. [Uninstall](#) [Beta](#) [Preferences](#)

Sounds
A great way to give your employees a reason to laugh this week. This add-on will make sounds play whenever certain events occur, such as clocking in or out. [Uninstall](#) [Preferences](#)

QuickBooks Integration Preferences

QuickBooks Integration
Synchronize QuickBooks users, customers, jobs, service items & export timesheets seamlessly.

You're ready for your first import!

Your QuickBooks account is now integrated with TSheets. The next step is to perform your first import. To do this, click the QuickBooks menu in the top right corner and select Import.

intuit. [Profile](#) [Logout](#)

Your Name [Profile](#) [Logout](#)

QuickBooks

- [Import](#) 
- [Export All Approved Time](#)
- [View Sync Log](#)
- [Preferences](#)
- [Help](#)

STATUS: **CONNECTED**
([Disconnect from QuickBooks](#))

Last sync: You haven't sync'd yet!
qbia_desktop

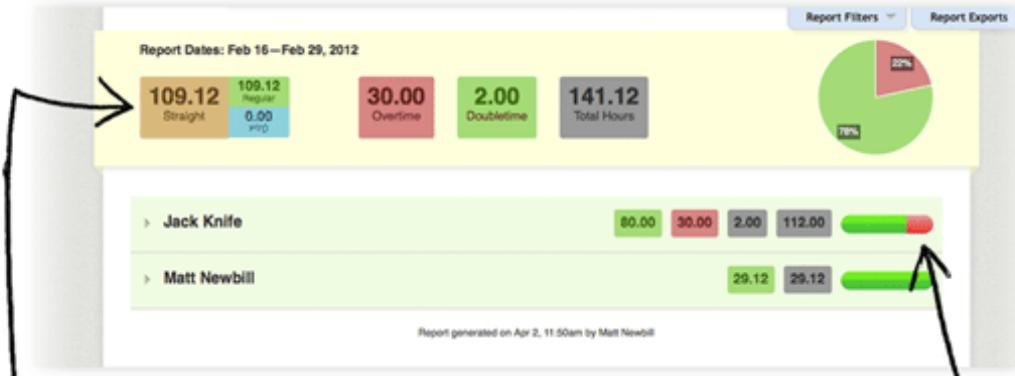
Have Questions?
Read the [QuickBooks Integration Guide](#) or [Contact Support](#).

IN-DEPTH REPORTING & EXPORTING

The screenshot shows the S.H.I.E.L.D. - QuickBooks application. The menu bar includes 'File', 'Employees' (which is selected and highlighted in green), 'Banking', 'Reports', 'Window', and 'Help'. A sub-menu for 'Employees' is open, showing 'Employee Center', 'Enter Time' (which is also highlighted in green), 'Payroll', 'Guide to Hiring Employees', and 'HR Essentials and Insurance'. A tooltip for 'Enter Time' says 'Use Weekly Timesheet' and 'Time / Enter Single Activity'. The main window is titled 'Weekly Timesheet' and shows a 'Timesheet' for 'Anthony Stark' for the week of Aug 11 to Aug 17, 2013. The table lists various activities and their time entries. The table has columns for CUSTOMER:JOB, SERVICE ITEM, PAYROLL ITEM, NOTES, CLASS, and days of the week (SU 11, M 12, TU 13, W 14, TH 15, F 16, SA 17). The 'TOTAL' column shows the sum of hours for each row. The 'BILLABLE?' column contains checkboxes. The 'Notes' column for the first two rows contains 'Meeting and negotiations.' The 'Class' column for the first two rows contains 'Field Work'. The 'Notes' column for the third row contains 'High Risk Work'. The 'Class' column for the fourth row contains 'Field Work'. The 'Notes' column for the fifth row contains 'Lab Work'. The 'TOTAL' column for the first two rows shows 6:00. The 'TOTAL' column for the third row shows 8:00. The 'TOTAL' column for the fourth row shows 10:00. The 'TOTAL' column for the fifth row shows 4:00. The 'TOTAL' column for the sixth row shows 12:00. The 'TOTAL' column for the seventh row shows 42:00. The 'Wrap text in Notes field' checkbox is checked. The bottom of the window has buttons for 'Copy Last Sheet', 'Save & Close', 'Save & New', and 'Revert'.

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 & Develop...	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	

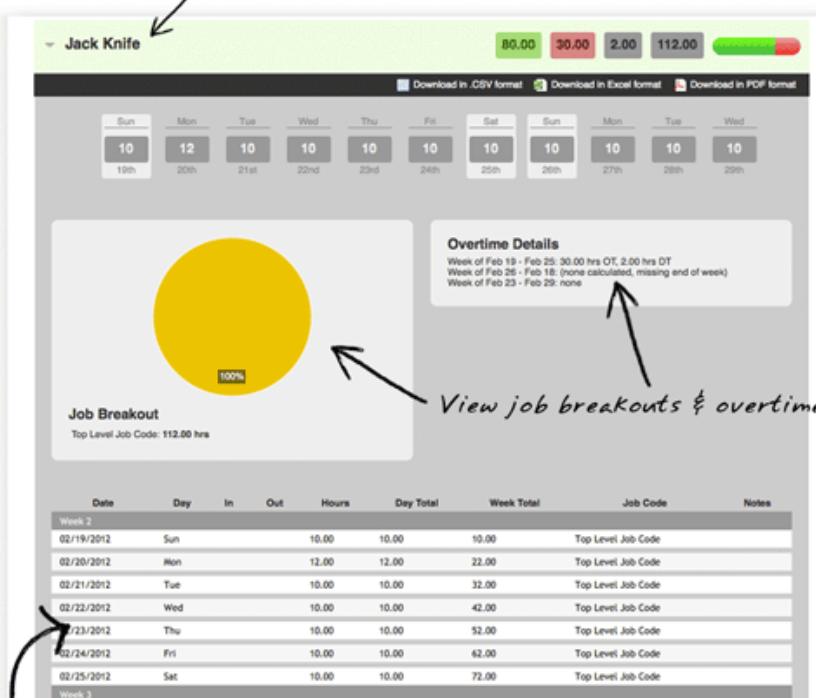
IN-DEPTH REPORTING & EXPORTING



View report totals at a glance

Quickly see overtime and paid time off

Click an employee's name to view more details



IN-DEPTH REPORTING & EXPORTING

Easily create report filters to get the data you need

The screenshot shows a reporting interface with the following elements:

- Top Bar:** Report Dates: Feb 16, 2011 – Feb 29, 2012, Filters: Clear All Filters, Job Code: Warner, Inc (with an 'X' button).
- Left Side:** A green box displays 1660.3 Report Hours. Below it are buttons for View Timesheets, Download Timesheets (.csv), and Print Report.
- Job Code Pie Chart:** Shows two segments: 28% (light blue) and 72% (yellow). Below the chart, under Job Code: Warner, Inc (X), are links to Warner, Inc / Website and Warner, Inc / Brochure. The chart has a total value of 1196.26 and 464.04.
- Groups Pie Chart:** Shows two segments: 90% (yellow) and 10% (light blue). Below the chart, under No Group Sales, are values 1542.74 and 117.57. The chart has a total value of 1660.31 hrs.
- Annotations:**
 - An arrow points from the text "Easily create report filters to get the data you need" to the "Report Filters" button in the top bar.
 - An arrow points from the text "View and download individual timesheets & print reports" to the "Print Report" button.
 - An arrow points from the text "Click chart segments to create report filters" to the 28% segment of the Job Code pie chart.
 - A curved arrow at the bottom points from the text "View chart totals of jobs, groups, employees and more" to the total hours displayed in the green box (1660.3 Report Hours).

View and download individual timesheets & print reports

Click chart segments to create report filters

View chart totals of jobs, groups, employees and more

WHO'S A GOOD FIT FOR TSHEETS

Our Top Industries



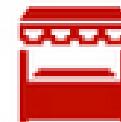
**ACCOUNTING &
TAX SERVICES**



CONSTRUCTION

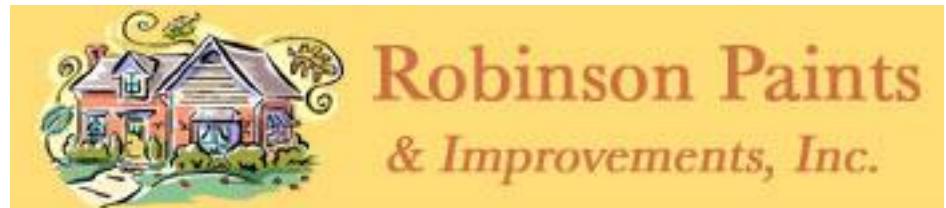


LANDSCAPING



**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**

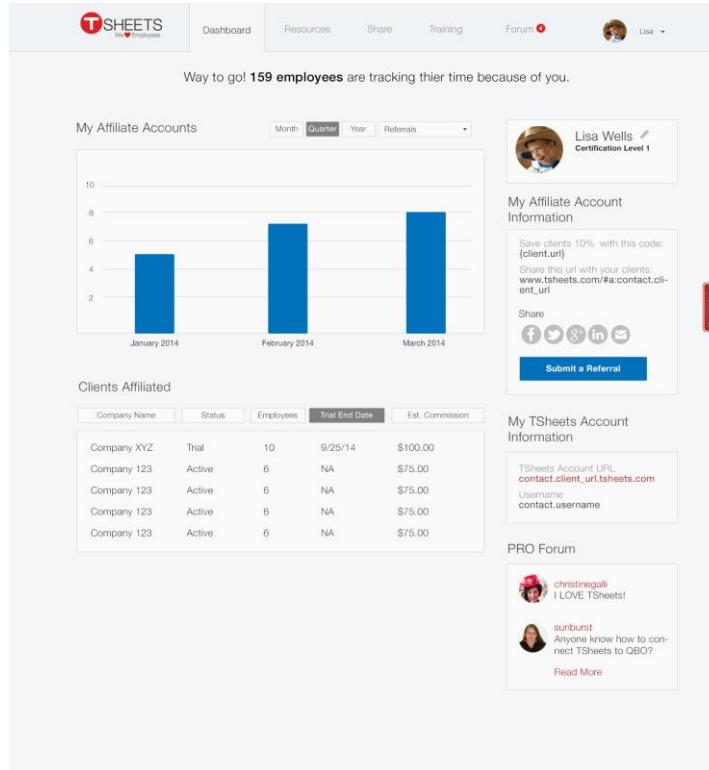
SO NOW WHAT?

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**



The screenshot shows the TSheets PRO Portal dashboard. At the top, it displays a message: "Way to go! 159 employees are tracking their time because of you." Below this, the "My Affiliate Accounts" section features a bar chart showing the number of clients affiliated over time: January 2014 (approx. 5 clients), February 2014 (approx. 7 clients), and March 2014 (approx. 8 clients). The "Clients Affiliated" table lists five companies with their respective details:

Company Name	Status	Employees	Trial End Date	Est. Commission
Company XYZ	Trial	10	9/25/14	\$100.00
Company 123	Active	6	NA	\$75.00
Company 123	Active	6	NA	\$75.00
Company 123	Active	6	NA	\$75.00
Company 123	Active	6	NA	\$75.00

On the right side, there are several panels: "My Affiliate Account Information" (with a referral code and share button), "My TSheets Account Information" (with account URL and username), and a "PRO Forum" section with posts from users like "christinegalli" and "sunburst". A "live chat" button is also visible.



WE'RE HERE FOR YOU!

888.836.2720

prosupport@tsheets.com