



Welcome, TSheetsPRO!

Here's a checklist to help you take the next steps.

Welcome to TSheets, the top rated time tracking app. To make the most of your TSheetsPRO account, we've put together a checklist to help you explore your PRO Portal, refer clients to TSheets, access additional resources, and more!

1 Explore Your Free Account and PRO Portal

- Book a 15-minute chat with your dedicated Account Specialist. They can walk you through your account setup and give you a tour of the PRO Portal.
- Can't wait? Explore now! Log in to your TSheets account and click the link to your PRO Portal, located under "Set Up."
- Click the Resources tab to read and share case studies and whitepapers, download banners, and more.
- Check out the Refer tab to see your affiliate link, edit your personalized TSheets invitation, and manage your referrals.

2 Become a Certified TSheetsPRO

- Register to attend the [TSheetsPRO Fundamentals webinar](#), hosted weekly by our TSheetsPRO team.
- Take (and pass!) the test to become a Certified TSheetsPRO. Certified PROs get a FREE TSheets account for life, a badge to share on websites and social media, and more!
- Visit our [Learning Center](#) for other resources.

3 Use the Accountant View to Add and Manage Your Clients' TSheets Accounts

- Book a 15-minute chat with our dedicated Account Specialist. They can walk you through the Accountant View.
- Can't wait? Explore now! In the top-right corner of your TSheets account, click your profile drop-down, find "Client Access," and click "Manage."
- Click "Add Clients" to start a client's 14-day TSheets trial. Or click "Invite Clients" to request access to a client's existing TSheets account.
- Access a client's TSheets account by clicking your profile drop-down, find "Client Access," choose the company you'd like to manage, and click "Switch."
- Choose direct or wholesale billing. Not sure what the difference is? [Learn more!](#)

4 Schedule a TSheets Demo for Your Client!

- [Schedule an appointment](#) and a member of our PRO team will walk you and your client through TSheets together.

HAVE A QUESTION?

Contact our dedicated TSheetsPRO team, available when you need them via email at prosupport@tsheets.com or by phone at 888-836-2720.