



PRODUCT PLANS

Plans

Lite

**\$5M annual transaction volume (ATV)
included + 0.2% of ATV thereafter**

- ✓ Unlimited Users
- ✓ Jobs
- ✓ Unlimited Price Books
- ✓ Access Management
- ✓ Tickets
- ✓ Invoice
- ✓ Standard CSV Exports
- ✓ Client Portal
- ✓ Client eSignature Approval
- ✓ Flexi-Forms
- ✓ Divisional Branding
- ✓ Non-Recurring Billables

Essentials

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- ✓ Tasks
- ✓ T&M Estimates
- ✓ Timesheets
- ✓ Timesheet Billing Automation

Performance

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- ✓ Tasks
- ✓ T&M Estimates
- ✓ Timesheets
- ✓ Timesheet Billing Automation
- ✓ Timesheet Payroll Automation
- ✓ Job Costing
- ✓ Purchase Order
- ✓ Job Performance Reporting
- ✓ WBS Phase Management
- ✓ Cost and Actual per WBS

Ultimate

**\$20M annual transaction volume (ATV)
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- ✓ Timesheet Payroll Automation
- ✓ Job Costing
- ✓ Purchase Order
- ✓ Job Performance Reporting
- ✓ WBS Phase Management
- ✓ Cost and Actual per WBS
- ✓ Budget and Contract Values per WBS
- ✓ Change Order
- ✓ RFI

** Annual Transaction Volume (ATV) is the total value of invoices generated within a 12-month period from the subscription start date, or tickets if no invoices are used.*

Add-Ons

Modules

Dispatch + Compliance

Access to Aimsio drag-and-drop dispatch, resource timeline, job timeline, and certificate compliance.

Dedicated Azure MS SQL Database

Access to all of your Aimsio data, hosted and maintained on an Azure database. Simply connect your own analytics engine.

Embedded PowerBI

Access to embedded PowerBI analytics engine. Includes Azure MS SQL Database access.

Rail Production Report

Create rail service, maintenance, and construction production reports that connects to the Aimsio Invoice module and exports to FieldGlass.

API / Web Service Integrations

QuickBooks Online

Sage Intacct

Sage 300*

Explorer Eclipse*

Viewpoint Vista*

Netsuite*

Acumatica*

MS Business Central*

MS Nav*

Self-Serve Integrations*

ADP*

** API/Web Service Integration requires involvement from your 3rd party software provider. 3rd party fees may apply.*

Professional Services

CUSTOM INVOICE CSV EXPORT*

Available in all Product Plans

QuickBooks Desktop	Sage 50	Sage 300	Open Invoice
Xero	MS Nav	MS Business Central	Great Plains
Acumatica	Other		

CUSTOM TIME (EMPLOYEE, SUBCONTRACTOR, REIMBURSEMENTS) EXPORT CSV*

Available in Performance and Ultimate Plans

QuickBooks Desktop	Sage 50	Sage 300	ADP
Ceridian	Payworks	Xero	Acumatica

CUSTOM EXPORT CSV

Available in Essentials Plan and above

Custom Export CSV

Through consultation to determine capability and price

OPERATIONAL FORMS

Available in Essentials Plan and above

Operational Forms

Add basic forms to your Aimsio account such as safety check lists, equipment check lists, or pre-job inspection form

* License or service fees from your 3rd party software provider may be required to accept custom CSV exports from Aimsio.

	Lite	Essentials	Performance	Ultimate
TICKETS, LEMS, AND TIMESHEETS				
iOS & Android Mobile Apps for Field Users	✓	✓	✓	✓
Billable Line Items in Ticket	✓	✓	✓	✓
Third Party Charges with Markup (NRB)	✓	✓	✓	✓
Unlimited Price Books	✓	✓	✓	✓
Client Portal	✓	✓	✓	✓
Client eSignature Approval	✓	✓	✓	✓
Tabular Report of Raw Hours as They Appear in the Ticket, LEM, or Timesheet	✓	✓	✓	✓
Individual & Crew Timesheets		✓	✓	✓
Timesheet to Ticket Automation (On Web Only)		✓	✓	✓
Timesheet Billing Automation		✓	✓	✓
Timesheet Payroll Automation			✓	✓
BILLING				
Invoice PDF Grouping Options	✓	✓	✓	✓
Invoice CSV Export	✓	✓	✓	✓
PDF Changes	✓	✓	✓	✓
Non-Recurring Billables	✓	✓	✓	✓
Billing Rules	✓	✓	✓	✓
Automatic Hours Splitting for Billing		✓	✓	✓

	Lite	Essentials	Performance	Ultimate
JOB PERFORMANCE				
Work Breakdown Structure (WBS) per Job			✓	✓
Job Performance Reporting			✓	✓
WBS Phase Management			✓	✓
Cost and Actual per WBS			✓	✓
Job Committed PO (Purchase Order, NRB)			✓	✓
Budget and Contract Values per WBS				✓
JOB COSTING				
Breakdown of RT/OT/DT Based on Payroll/Union/Labor Rules			✓	✓
Equipment Costing			✓	✓
Material Costing			✓	✓
Lump Sum Pay (e.g. Subsistence and Truck Bonus)			✓	✓
Email Timecards			✓	✓
Custom CSV Export of Timecards (Professional Services apply)			✓	✓
CHANGE ORDERS				
Updating Job Contract Values based on approved COs				✓
Updating Job WBS quantities based on approved COs				✓
Automating CO				✓
Client Portal				✓
Client eSignature Approval				✓

	Lite	Essentials	Performance	Ultimate
PURCHASE ORDER				
Create Field PO Requisition			✓	✓
Approval of PO by SMS			✓	✓
Receive Against PO			✓	✓
Allocating PO Lines Against Job Phase			✓	✓
Client Portal			✓	✓
Client eSignature Approval			✓	✓
T&M ESTIMATE				
Estimate Form		✓	✓	✓
Estimate to Price Book Automation		✓	✓	✓
Estimate to Job Order		✓	✓	✓
Client Portal		✓	✓	✓
Client eSignature Approval		✓	✓	✓
BID				
Enter budget quantity/rates and contract values per Billable Item for each WBS				✓
Enter labor budget and contract values separated by RT/OT/DT				✓
Enter other billable types based on quantity and rate types (e.g. 1 Day or 8 hours of Dozer)				✓
Generate a PDF for sending to customers with the flexibility to show/hide details (e.g. only show contract values or show every budget line item)				✓

	Lite	Essentials	Performance	Ultimate
RFI				
Create and Link a Change Order based on an RFI				✓
Client Portal				✓
Client eSignature Approval				✓
REPORTING				
Standardized reports for billing and operational data	✓	✓	✓	✓
Standard Tabular Reports (Listing pages)	✓	✓	✓	✓
OPERATIONAL ENHANCEMENTS				
Divisional Branding No configuration changes allowed per division, only branding. Maximum number of allowed Divisional Branding is 4 per account.	✓	✓	✓	✓
Flexi Forms	✓	✓	✓	✓
Tasks		✓	✓	✓
MASTER DATA				
Master Data CSV Import	✓	✓	✓	✓

	Lite	Essentials	Performance	Ultimate
ACCESS MANAGEMENT				
Access Management	6 Pre-Defined Access Levels	6 Pre-Defined Access Levels	6 Pre-Defined + 2 Configurable Access Levels	6 Pre-Defined + 2 Configurable Access Levels
Limit Data Viewing Based on Logged in User	✓	✓	✓	✓
Form Change Audit	✓	✓	✓	✓
Modify Permissions		✓	✓	✓

Onboarding

	Lite	Essentials	Performance	Ultimate
ONBOARDING				
Set-Up	3 Weeks*	4 Weeks*	6 Weeks*	6 Weeks*
Training & Testing	3 Weeks*	4 Weeks*	4 Weeks*	4 Weeks*
Branding	Logo / Color / Address	Logo / Color / Address	Logo / Color / Address	Logo / Color / Address
Access Management & Data Import	✓	✓	✓	✓
Billing	✓	✓	✓	✓
User Testing	✓	✓	✓	✓
Estimation		✓	✓	✓
Purchasing			✓	✓
Resource Costing			✓	✓
Change Orders / Bids				✓
TRAINING				
Billing Fundamentals - Mobile & Web App	✓	✓	✓	✓
Budget & Job Performance (WBS) - Web Only			✓	✓

* Standard onboarding time is subject to customer resource availability. Time to onboard will increase if add-ons are selected.