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01 Getting Started

Why Get a Field Management Software?

A Field Management software (FM software) is a tool used by companies to digitize their process for work done on job sites or in the field. Once the work is captured on the job site, the FM software is used to efficiently send that information back to the office for invoicing and reporting.

By using a FM software, your organization will replace paper and spreadsheets with a digitized solution to track time and materials. Save time on double data entry, fixing errors on timesheets, and so much more.

Features in a FM software can include dispatch, invoice, project tracking, estimation, and purchase orders, among many others.

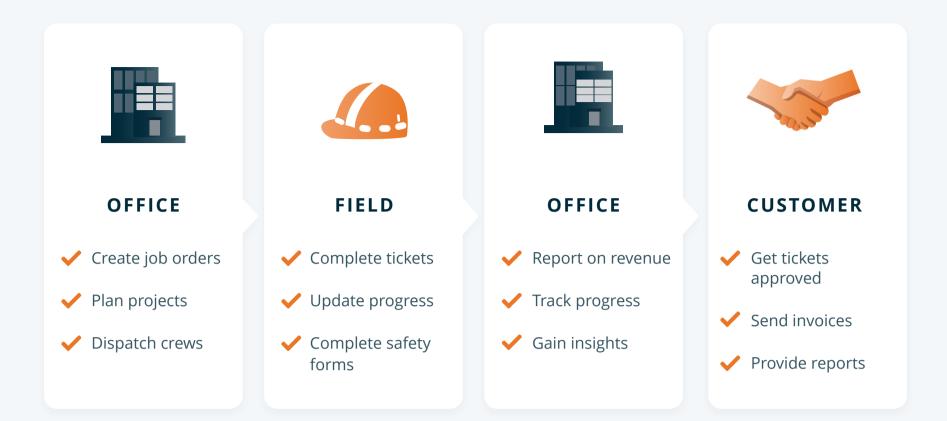
Who is Aimsio for?

Aimsio is a used by companies who have field operations. In other words, Aimsio is used by companies who dispatch resources (either crew or equipment) to job sites, and who need to easily record time and material usage while on those job sites.

If your company uses paper, spreadsheets, or a software that isn't solving your needs to do any of the following things, Aimsio could work for you:

- ✓ Fill out timesheets
- Fill out field tickets
- Create and track on LEMs
- Report on any of the above

How Aimsio Works



02 Key Considerations

When choosing the right FM software for your business, it is essential to understand how it will impact your managerial, operational, and financial processes. We've outlined some important considerations below, and explained how Aimsio addresses them:

Hardware Requirements: Web and Mobile Access

To use Aimsio, all you need is at least one person in the field with an iOS or Android device and at least one person in the office with a computer and access to the internet.

Accessibility: Offline Capabilities

If your field team is working at a job site that doesn't have wifi or service, the Aimsio app will still work. Once they return to an area with wifi or mobile service, they can sync and all the information will be sent to the office.

Integration with ERPs and Accounting Software: Third Party Collaboration

Aimsio has experience integrating clients' Aimsio systems with their third party software, it just depends on which third party software you're using. Some examples of ERPs and accounting software that we have integrated with in the past include QuickBooks, Sage, Netsuite, Explorer Eclipse, ViewPoint, and various Microsoft ERPs. To view all integrations <u>click here</u>.

Security: Secure Cloud Storage

Aimsio is a cloud-based app, meaning that your information is stored in the cloud, rather than on a server in your office or a remote data center. While this might sound unfamiliar, many companies do this. In fact, you're probably already familiar with this type of technology. Some examples of other companies who store data in the cloud include Google Drive, Gmail, Dropbox, HubSpot, online banking, and MS Office...just to name a few. The cloud is safe even safer than servers stored in your office.

03 Industry Expertise

We've been doing this for a while and have seen every possible way a company can operate. If you see your industry below, Aimsio will work for you.

Pipeline

We've worked with pipeline maintenence, construction, and inspection companies in the past. Manage your timesheets, safety forms, inspection reports, and progress reports easier. Plan your entire process from ROW to Installation, track budget vs. actuals, dispatch crew and equipment, create POs, and much more.



Water Management

Track field operations including water acquisition, transport, treatment and disposal, and many more. Create timesheets, complete safety forms, and track activities using work management tickets.



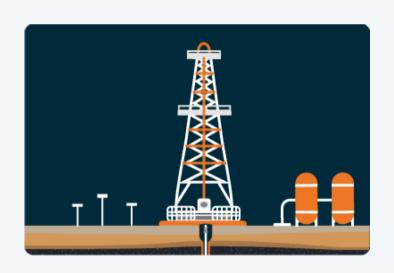
Access Solutions

Whether your company specializes in mat washing, mat delivery, installation, rentals, or sales, we'll make it easier to manage your activities in the field. One of the biggest reasons to use Aimsio is the ability to easily create field tickets from timesheets, mat information sheets, and bills of lading. Automatically pull in the information from each source and make one master field ticket.



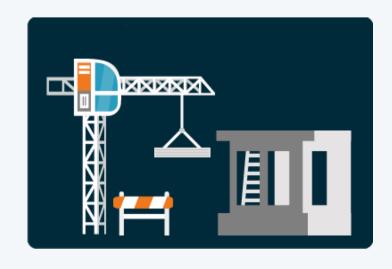
Oilfield Services

The very first product we created back in 2014 was for Oilfield Services; it's where it all began for us. We fully grasp what it takes to complete a job in the field. Use Aimsio to dispatch crew and equipment, capture time and material, and create and send invoices.



Construction

Record LEMs, complete POs, fill out timesheets, charge back 3rd party items, track projects, fill out safety forms, dispatch resources, and more. It doesn't matter if you're doing heavy, commercial, facility, or civil construction, our job is to make your job easier.



Electrical & Instrumentation

We've worked with Electrical and Instrumentation companies to track projects, manage safety data, create estimates, dispatch resources, and much more. While you're providing services for your clients such as facility construction, meter proving, and panel fabrication and assembly, we make it easier for you to keep track of the work you've done on site.



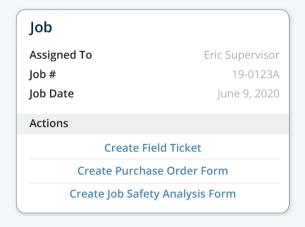
Rail Services

Aimsio makes it easy to complete production reports and other paperwork. Capture time and material in Aimsio and streamline your entire process.



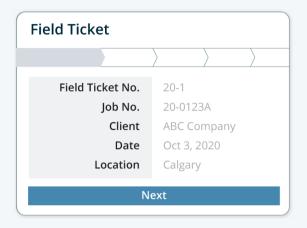
04 Software Features

Explore all of our features below. If you have any questions we are happy to make recommendations for you.



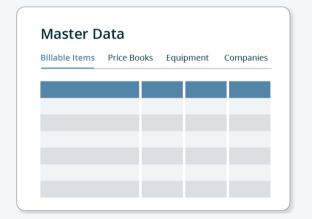
Job Order Management

- Digitized work management tickets and forms that are accessible on tablets, eliminating the use of paper in the field
- Choose from a variety of modules to help you transform your workflows from manual processes to a digitized solution



Work Management Tickets

- ✓ Digitize your field paperwork. Whether you use field tickets, LEMs, work tickets, or daily tickets, you'll get rid of the paperwork
- Switch from manual processes to a formbased workflow software
- ✓ Price book management
- ✓ Your Work Management Tickets can look and feel exactly like your paper tickets...if you want. Or we can find efficient ways to streamline them. Either way, they'll look and feel familiar to your team so the software is easy to use



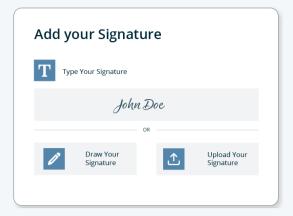
Master Data

Import and export your master data in CSV format



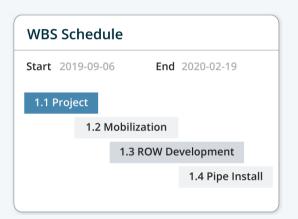
Invoice

- Select multiple tickets to easily create an invoice
- ✓ Include backup tickets with invoices
- ✓ Filter invoices based on status, eg. client approved, manager approved, customer signed, etc.
- Export invoice data for accounting and finance



Client eSignature Approval

- Once WMTs or timesheets are ready for approval, send your documents to a customer for an eSignature
- ✓ Built within Aimsio



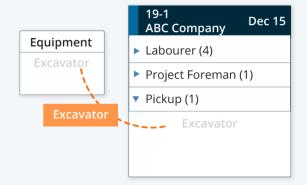
Job Performance

- ✓ Define the phases or Work Breakdown Structure (WBS) for each project and view them in a Gantt chart
- Track the progress of each WBS in real-time as work gets completed in the field
- ✓ Compare actual costs vs. budgeted costs
- Choose to bill using either the lump sum method or the time and materials approach
- ✓ View columns that show money in vs. money out
- ✓ A trusted project tracking system that will show you the overall performance and health of your jobs, including P&L reports



Operational Forms

✓ A digital form that crew can fill in on their iPad on the job site



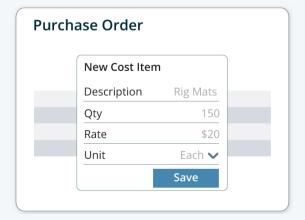
Dispatch

- Drag and drop to dispatch resources to a specific job
- ✓ View all active jobs
- ✓ View the availability of resources
- Job acceptance from crew via text or email
- Send mass job updates to crew
- ✓ View compliant crew members and dispatch them directly from the module
- Manage equipment mobilization and demobilization directly within the module



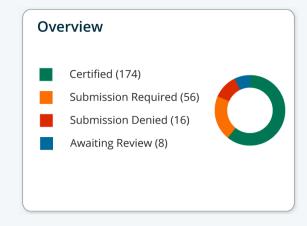
Estimation

- Create estimates and set up different rates
- Create packages by applying discounts or markups to an individual or a bundle of items
- Automatically convert an approved estimate to a price book
- Because the data is captured in the system, you have the ability to report on trends such as won vs. lost bids, breakeven on purchased equipment, etc.



Purchase Order

- Request, approve and reconcile POs
- Charge POs back to clients
- ✓ Track and report on purchases



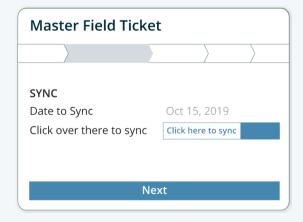
Certificate Tracker

- Monitor validity and expiration of employee certificates
- Mandate certifications by trade, location, and customer
- ✓ View compliant crew members and dispatch them directly from the module*
- Remind crew that updated certifications are required for each job*
- Field Supervisors can review jobs in advance and see who isn't certified to proactively resolve the issue



Embedded Power BI

- ✓ Your Insights dashboard will include five preconfigured reports
- ✓ Visualize and compare important information such as time and equipment across locations, customers, or supervisors
- ✓ Allow user-based access for individuals



Custom Cross Form Automation

- Allows for work from multiple users to be consolidated into one single Master Form or Ticket
- Select the fields that should be carried from multiple Smart Forms to a Master Form or Ticket

^{*} If you also have the Dispatch module



Resource Costing

- Calculate the cost of resources like Labor, Equipment, Material, and Miscellaneous items
- ✓ Track billable time and material
- Set different billing rates vs. payroll rates and create user filters
- ✓ Take different rate types into consideration, such as unions, holidays, etc.
- Extract timecards



Web Service Integration

- ✓ Integrate your existing ERP software such as QuickBooks, Sage, Netsuite, Explorer Eclipse, ViewPoint, and various Microsoft ERPs.
- Export invoices to an existing accounting cloud software such as Sage or QuickBooks (see full list)
- Capture data at the source

Here's what to expect after you sign up:

Sign off on proposal and select payment frequency You provide logo, address, and branding guidelines 2 Onboarding team assigned and onboarding kick-off meeting scheduled Master data walkthrough and import (Equipment, employees, billables, etc.) 5 Staging account available within two weeks - Annual subscription begins Invoice sent on the first day of billing cycle - Accepted forms of payment; credit card 6 or PAD/ACH Onboarding kick-off meeting 1. Discuss onboarding timeline 7 2. Review support and communication plan 3. Review project expectations Weekly check-in meetings with your project lead and Aimsio 8 Feedback window and small group user testing, plus Quality Assurance testing 9 Final account review 10 Go-Live on primary platform and coordinate training

Customer Support

Once the software is in place, the Aimsio Customer Support team makes sure you are given dedicated support in a timely and efficient manner to handle concerns that may happen in your day-to-day experience. You can contact us through email, phone, or you can submit a ticket online. Your Implementation Specialists will walk you through this process.

08 Customer Testimonials



"Aimsio is a great software and an even better team. They work hard to **make the transition to Aimsio as smooth as possible**. Their customer service is incredible. I recommend Aimsio all the time to anyone who complains they have a system that doesn't work for them. We're very happy we made the switch to Aimsio."



Greg Epp, Director of Operations

Stratus Electrical & Instrumentation



"Before using Aimsio, our data was scattered across numerous spreadsheets. We used to spend days putting together reports. Now, we're able to **track costs to jobs and know where we're at compared to budget**. I've used other software similar to Aimsio and nothing compares. They're either too complex and difficult to use or not comprehensive enough."



Chris, Project Manager

REED Energy Group Inc.



"We have been operating and benefiting from our Aimsio software right from the start! Aimsio integrated with our construction software seamlessly. The importing and exporting of all necessary information enabled a **real time link between the office and the field**. It has been extremely useful and time saving. Aimsio software is exceptionally easy to use, simple to understand and the functionality for our field personnel was valuable to our workflow."



Debbie Dibner, Office Administrator

BC Flynn



"Strait Projects has realized significant value from implementing Aimsio software. Aimsio has streamlined our business processes, **provided valuable visibility** into our projects and been an ongoing business partner for us as we grow our business. We have reduced our administration costs by over 20%, eliminated our revenue leakage and decreased our invoicing lag time by 50%."



Terrence Boland, VP Finance



"Aimsio makes sense. The **easy-to-use software** provides what we need, as we need it. As a fast growing company, we love that Aimsio offers product plans to suit our changing needs as we continue to grow. Plus, their support is outstanding when it comes to offering and implementing simple, efficient solutions. We highly recommend Aimsio."



Horizon Testing INC.

Kerry Fance, Senior Office Administrator
Horizon Testing Inc.



"Aimsio has an amazing product and their team is something that other businesses dream of having. If your business is looking to go to the next level or strategically set itself apart from the crowd, you need to check Aimsio out."



Jeff M., Project Controls

MAXX North America Services Ltd. and Total Evolution Consulting Inc.

09 Contact Us

If you have any questions, contact us. We'd be happy to talk in person!



Call us

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Send us an email

sales@aimsio.com



Visit our website

aimsio.com

almsið

The Aimsio platform allows business to plan, manage, and then dispatch resources such as equipment and crew to a project. Users in the field can then complete electronic field tickets, purchase orders and forms on a tablet. All project progress is tracked in real-time. Data and workflows are also available offline to enable work in areas without internet connection. Users can also geographically tag and visualize where operations take place.

Request Demo

Get Pricing





