

Prerequisites and Setup

Last Modified on 08/13/2026 11:33 am EDT

System Requirements

Before using AIA Style Billing, ensure your SedonaOffice system meets these requirements:

1. AIA style billing is a feature introduced with SedonaOffice v6.2.0.23 (earlier versions of SedonaOffice do not have this feature)
2. Job Module Access: Users must have appropriate permissions to create and manage jobs
3. AR Module Access: Required for invoice generation and customer billing
4. GL Integration: Properly configured GL accounts for revenue recognition
5. Install Items: Understanding of how to create and manage install items in jobs

Company Setup

There is no specific setup to enable AIA style billing. Sites that have updated to SedonaOffice 6.2.0.23 can begin using AIA style billing, if needed.

To use AIA Style Billing, on the Job Work Order Entry form, users select the **Enable AIA Style Billing** checkbox. This changes the Install Items on a job/work order to Scheduled Values.

The screenshot displays the SedonaOffice application interface for a new job. The window title is "SedonaOffice - [New Job]". The menu bar includes File, Edit, View, SedonaOffice, Customer, Query, Tools, Window, and Help. The left sidebar shows a tree view of the application's structure, with "SedonaOffice" expanded. The main area is divided into two sections: "Job" and "Work Order Entry".

The "Job" section displays the following information:

Job	Customer	Site
Job Number 4511	Customer 50430	Site
Job Type	TestCustomer_IND	TestCustomer_IND
Job Status	#456	#456
New System	Mooresville, AL 35649	Mooresville, AL 35649
Labor Units		

The "Work Order Entry" section contains a "Job Information" form with the following fields:

- Job Number: 4511
- Job Type: [Dropdown]
- Description: [Text]
- Tax Group: NC - State Tax
- Branch: Alabama
- Holdback %: [Text]
- Install Company: [Dropdown]
- Installer: [Dropdown]
- Permits Required: [Checkbox]
- Permit 1: [Text]
- Permit 2: [Text]
- Permit 3: [Text]
- Prevailing Wage: [Text]
- Project Manager: [Dropdown]
- Salesperson: JesslynL
- P.O. Number: [Text]
- Sold Date: [Text]
- Projected Start: [Text]
- Projected End: [Text]
- Notes: [Text Area]

At the bottom of the "Job Information" form, there is a checkbox labeled "Enable AIA Style Billing". The "Apply" button is located at the bottom right of the form.

The status bar at the bottom of the window shows "6.2.0.21.4" and "4 Message(s) | BSTPL-LAP-61 - beesolver Administrator | April 15, 2026 21:42".

User Permissions

Ensure you have the following permissions:

- Create and edit jobs
 - Manage install items
 - Create billing applications
 - View and print AIA forms (Application and Certification for Payment form and Continuation Sheet form)
 - Post AR invoices
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