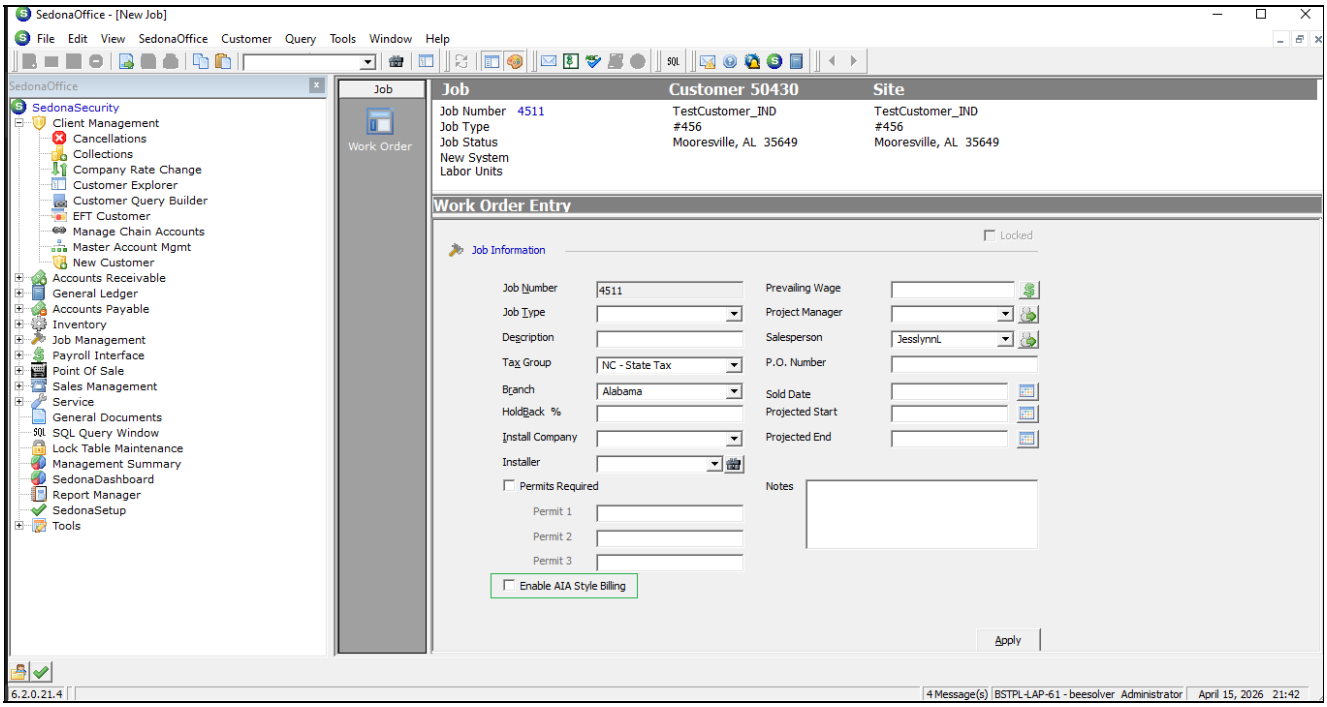
Getting Started with AIA Style Billing

Last Modified on 11/06/2026 7:49 pm EST

Step 1: Flag a Job for AIA Style Billing

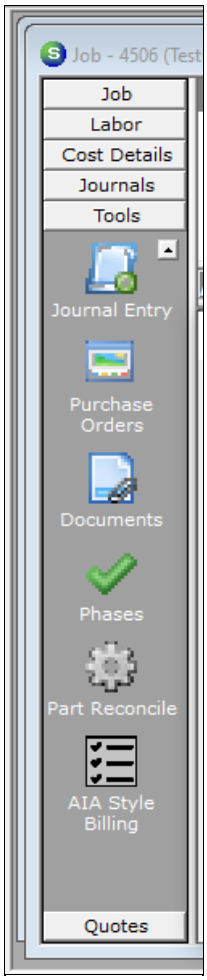
When creating or editing a job that requires AIA style billing:

1. Navigate to the Jobs module in SedonaOffice.
2. Open an existing job or create a new job.
3. Locate and select the Enable AIA Style Billing checkbox.
4. Save the job.



Important Notes:

- Once a job is flagged for AIA style billing, you will use AIA style billing applications instead of traditional job invoices.
- The AIA Style Billing button becomes available in the job's toolbar.

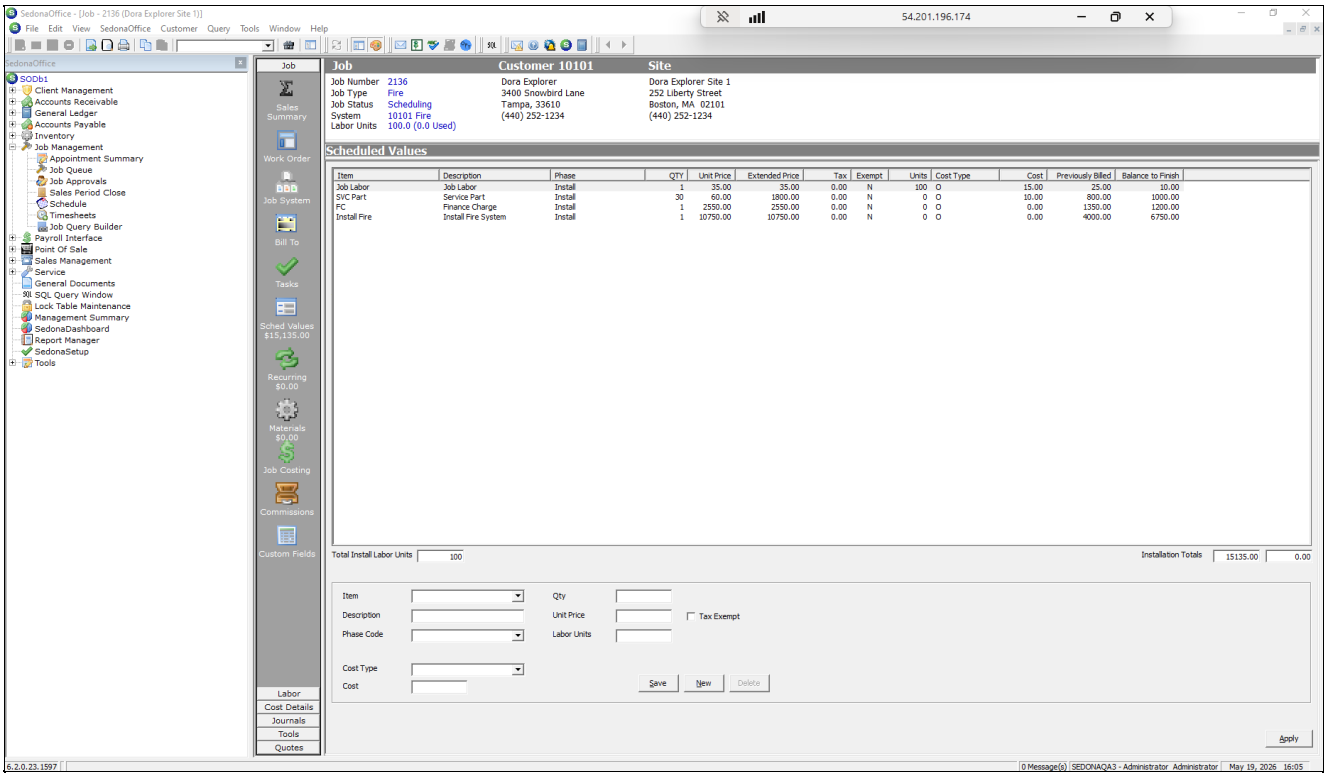


- On the Job toolbar, "**Install items**" becomes "**Scheduled values**" and this will be used to populate the Continuation Sheet form.
- When AIA Style Billing is enabled on a job, the following standard job features are not available for that job:
    - HoldBack %: The HoldBack % field on Work Order Entry is disabled, and no HoldBack % is applied to the job (including a Job Type default). Use the AIA retainage percentage instead.
    - Sales Reversal: The Sales Reversal button on Work Order Entry is disabled.
    - Change Orders: New change orders cannot be added to the job, from any location in SedonaOffice. If you try, the message "You cannot add a Change Order to an AIA Style Billing Job." is displayed.
    - Credits: Credits against invoices on the job are not available, regardless of how the invoice was created. This includes Credit Off Job Invoice, Create Credit Request, and credit/write-off of a job invoice. To correct a billing application, use an AIA revision or reversal.
- Enable AIA Style Billing only on jobs that do not already have a HoldBack % or change orders. If AIA Style Billing is enabled on a job that already has them, the existing HoldBack % and retention (including releasing existing retention) and existing change orders remain available, but the Job Sales Summary totals may not match the AIA billing totals.

Step 2: Set Up Scheduled Values

1. Scheduled values, when added, will appear on your Continuation Sheet form:
2. Open the job flagged for AIA style billing.
3. In the side toolbar, click Job > Scheduled Values.

4. Go to the Scheduled Values section.
    a. Add line items for each component of work, including:
        i. Description of work
        ii. Scheduled value (contract amount for this item)
        iii. Tax settings (if applicable)
    b. If needed, click Apply Template to choose a template with a predefined list of items.
5. Save your items.



Step 3: Configure Job Settings

Additional job-level settings for AIA style billing:

1. Bill To Customer: This is the customer who will receive the AIA style billing application.
2. Project Information: Enter location and site.
3. Contract Date and Number: Record the original contract details.
4. Retainage Percentage: If applicable, this is the retainage percentage to be held. This is separate from the job's HoldBack % on Work Order Entry, which is disabled for AIA Style Billing jobs.