

Getting Started with AIA Style Billing

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

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.

SedonaOffice - [New Job]

File Edit View SedonaOffice Customer Query Tools Window Help

SedonaOffice

Client Management
Cancellations
Collections
Company Rate Change
Customer Explorer
Customer Query Builder
EFT Customer
Manage Chain Accounts
Master Account Mgmt
New Customer
Accounts Receivable
General Ledger
Accounts Payable
Inventory
Job Management
Payroll Interface
Point Of Sale
Sales Management
Service
General Documents
SQL Query Window
Lock Table Maintenance
Management Summary
SedonaDashboard
Report Manager
SedonaSetup
Tools

Job

Work Order

Job Customer 50430 Site

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

Work Order Entry

Job Information

Job Number 4511 Prevailing Wage
Job Type Project Manager
Description Salesperson JesslynML
Tag Group NC - State Tax P.O. Number
Branch Alabama Sold Date
HoldBack % Projected Start
Install Company Projected End
Installer
☐ Permits Required
Permit 1
Permit 2
Permit 3
☐ Enable AIA Style Billing

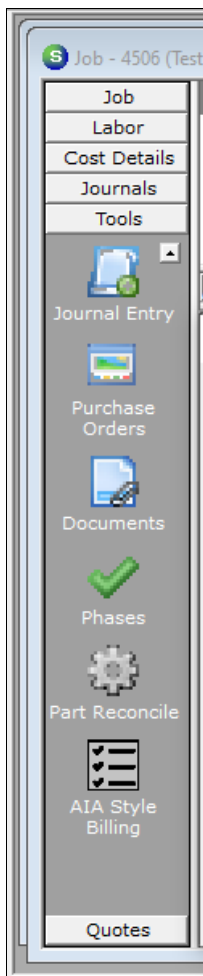
Notes

Apply

6.2.0.21.4 4 Message(s) BSTPL-LAP-61 - beessolver Administrator April 15, 2026 21:42

Important Notes:

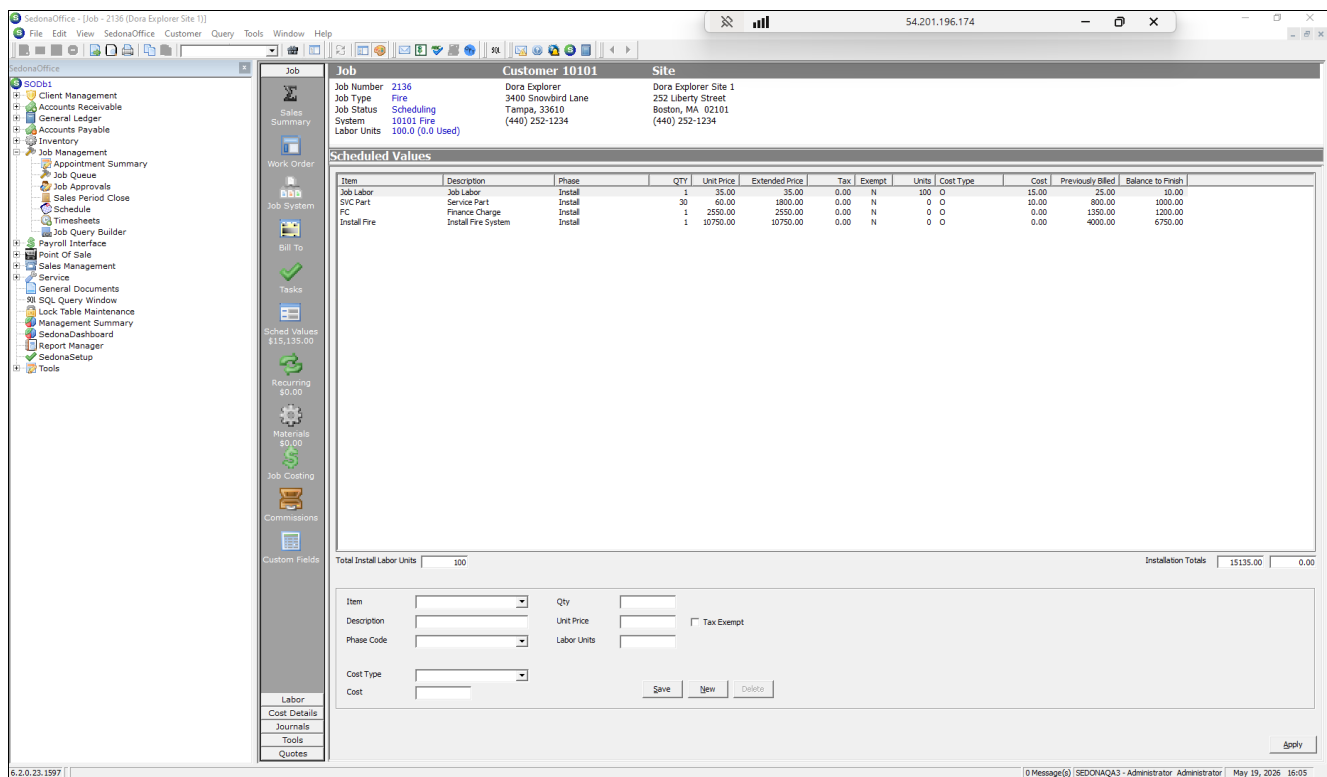
- Once a job is flagged for AIA style billing, you will use AIA style billing applications instead of traditional job invoices.
- The AIA Style Billing button becomes available in the job's toolbar.



- On the Job toolbar, “**Install items**” becomes “**Scheduled values**” and this will be used to populate the Continuation Sheet form.

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.