

Planning and Setup

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1. Job Setup:

- Flag jobs for AIA style billing at the time of job creation.
- Set up all install items before creating your first application.
- Ensure install item descriptions match your contract schedule of values.

2. Install Items Best Practices:

- Use clear, descriptive names that match your contract.
- Break down work into appropriate detail levels.
- Include line items for allowances and contingencies.
- Set scheduled values to match your contract exactly.

3. Change Orders:

- Process any change orders promptly.
 - Ensure change orders update install item scheduled values.
 - Verify the change order total appears correctly on the Application and Certification for Payment form.
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