Planning and Setup

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1. Job Setup:
    - Flag jobs for AIA style billing at the time of job creation, before any HoldBack % or change orders exist on the job.
    - 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:
    - Finalize any change orders before enabling AIA Style Billing on the job.
    - New change orders cannot be added once AIA Style Billing is enabled, so add all change orders before enabling it.
    - For jobs with change orders that existed before AIA Style Billing was enabled, verify the change order total on the Application and Certification for Payment form. The Job Sales Summary totals may not match the AIA billing totals on these jobs.