

AIA Style Billing Q & A

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Can AIA Style Billing Be Enabled After a Job Has Been Invoiced?

No. When AIA Style Billing is enabled for a job, it only recognizes invoices that are generated through the AIA Billing Application process.

If a standard invoice has already been created before AIA Style Billing is enabled, those previously generated invoices will not be recognized by the AIA Billing module because they were created outside of the AIA Billing process.

Do Job Tasks Work the Same with AIA Style Billing Jobs?

No. When AIA Style Billing is enabled, approving tasks marked for invoicing is no longer required to create invoices.

Instead, invoices are automatically generated when the AIA Billing Application is finalized. As a result:

- The invoice number is no longer automatically displayed on the Job Tasks.
- The user approving the task can manually enter the Application Invoice Number in the task's Comments section if desired.

How Are Change Orders Created for an AIA Style Billing Job?

If a change order needs to be added to an AIA Style Billing job, it should be entered as either a positive or negative adjustment to the Scheduled Values.

Unlike standard jobs:

- Standard Change Orders are not linked to AIA Style Billing.
- The job no longer needs to be locked when making these adjustments.

Where Is the Retainage (Holdback) Percentage Entered?

For AIA Style Billing jobs, retainage is not determined by the Job Type or entered in the **Holdback %** field on the Work Order tab.

Instead, enter the retainage percentage in:

AIA Style Billing Application → Application Summary tab → Contractor's Application for Payment → Retainage

Note: Retainage entered in the AIA Billing Application is currently **not displayed** on the Job Sales Summary as it is for standard jobs.

Can Parts Be Added and Invoiced on an AIA Style Billing Job?

Yes. Parts can still be added to the Materials tab with zero pricing (based on Job Type Setup) and issued to the job .

However, AIA Style Billing does **not** support billing individual parts. Instead, parts are typically grouped into a **Schedule of Values** line item.

Examples include:

- Fire Alarm Devices

- Access Control Equipment
- CCTV/Video Equipment

Can Recurring Billing Be Added to an AIA Style Billing Job?

No. AIA Style Billing does not support recurring billing.

If recurring billing is added to an AIA job, it will not be created until after the job has been closed .

How Is WIP Recognized on an AIA Style Billing Job?

Because invoices are automatically generated when the AIA Billing Application is finalized, there is no option to enter a WIP percentage on the invoice.

As a result:

- WIP is relieved only when the AIA Style Billing job is closed.
- If WIP needs to be relieved before the job is closed, the current workaround is to enter manual journal entries.

****Enhancement Request:** A request has been submitted to allow WIP to be relieved before an AIA Style Billing job is closed.

What Is the Process for Closing an AIA Style Billing Job?

Once the following conditions have been met:

- The AIA Style Billing job has been billed **100%**, and
- All job tasks have been approved,

the job can be closed using the same process as a standard job.
