

AIA Style Billing – Application Revisions

Last Modified on 09/11/2026 11:00 am EDT

To revise an AIA Style Billing Application, follow the steps below. There is currently no Revision button.

AIA Style Billing Tab

To Revise an AIA Style Billing Application Invoice, navigate to the AIA Billing Tab and select New.

The screenshot shows the 'AIA Style Billing' window for Job 5096. The table below contains the application data:

Application No	Revision	Application Date	Period To	Current Payment Due	Balance to Finish	Status	Invoice/Credit
1		07/30/2026	07/30/2026	\$1,000.00	\$9,500.00	Finalized	500645

At the bottom of the window, the 'New' button is highlighted with a red box and an arrow.

When the application opens, enter the previous application number and enter "R" in the field to the right of the **Application No.** field.

The screenshot shows the 'APPLICATION AND CERTIFICATION FOR PAYMENT' form. The 'Application No' field is highlighted with a red box, and a red arrow points to the field to its right where 'R' should be entered.

Select the **Scheduled Values** tab and enter a negative amount for the appropriate line item(s).

Then:

Select **Save** if you need to review the application before completing the revision.

Select **Finalize** when you are ready to complete the revision.

AIA Style Billing - Job 5096 - Application 2

Application Summary Scheduled Values

CONTINUATION SHEET

ITEM NO	DESCRIPTION OF WORK	SCHEDULED VALUE (TAXES INCLUDED)	WORK COMPLETED		MATERIALS PRESENTLY STORED (NOT IN D OR E)	TOTAL COMPLETED AND STORED TO DATE (D + E + F)	% C/F	BALANCE TO FINISH (C-G)	RETAINAGE
			FROM PREVIOUS APPLICATION (D+E)	THIS PERIOD					
1	Install Cellular Backup	\$5,000.00	\$1,000.00	\$0.00	\$0.00	\$500.00	10	\$4,500.00	\$0.00
2	Cellular Equipment	\$2,500.00	\$0.00	\$0.00	\$0.00	\$0.00	0	\$2,500.00	\$0.00
3	Wireless Equipment	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0	\$3,000.00	\$0.00
Totals		\$10,500.00	\$1,000.00	(\$500.00)	\$0.00	\$500.00	5	\$10,000.00	\$0.00

Delete Preview Release Ret. **Save** Finalize Close

Once Finalized, a Credit Invoice will be generated and shown on the AIA Billing Summary with an "R" under the Revision Column. The Credit will need to be manually applied to the Invoice.

The Total Billed Amount and Balance to Finish Amounts are also updated.

Job 5096 Customer 50801 Site

Job Number 5096 Mel Monroe Mel's Cabin
 Job Type Cell Backup 123 Grace Valley Rd
 Job Status Order Parts 123 Grace Valley Rd
 New System Daphne, AL 36526
 Labor Units 5 (0 Used)

AIA Style Billing - Job 5096

Application No.	Revision	Application Date	Period To	Current Payment Due	Balance to Finish	Status	Invoice/Credit
1		07/30/2026	07/30/2026	\$1,000.00	\$8,500.00	Finalized	5096G
1	R	07/30/2026	07/30/2026	(\$500.00)	\$10,000.00	Finalized	5096H

Contract Sum 10500.00 **Total Billed Amount 500.00** Balance To Finish 10000.00 Finalized Only

Delete Preview Open New Close

The Invoicing Tab also displays the Credit that was generated.

New Job

Job Job Customer 50801 Site

Labor Job Number 5096 Mel Monroe Mel's Cabin
 Cost Details Job Type Cell Backup 123 Grace Valley Rd
 Journals Job Status Order Parts 123 Grace Valley Rd
 Tools New System Daphne, AL 36526
 Labor Units 5 (0 Used)

Invoicing

Invoice #	Date	Desc	Amount	Net Due
500645	7/30/2026	Installation Services	1000.00	1000.00

Credit #	Date	Desc	Amount	Balance
500646	7/30/2026	Installation Services	500.00	500.00

The Scheduled Values Tab updates the Line Item to show the Credit.

New Job

Job

Customer 50901

Site

Job Number 5096

Mei Monroe

Mei's Cabin

Job Type Cell Backup

123 Grace Valley Rd

123 Grace Valley Rd

Job Status Order Parts

Daphne, AL 36526

Daphne, AL 36526

New System

Labor Units 5 (0 Used)

Scheduled Values

Item	Description	Phase	Qty	Unit Price	Extended Price	Tax	Exempt	Units	Cost Type	Cost	Previously Billed	Balance to Bill
Install Cell Backup	Install Cellular Backup	Phase 01	1	5000.00	5000.00	0.00	N	1	L	2000.00	300.00	4500.00
Cellular Equipment	Cellular Equipment	Phase 01	1	2500.00	2500.00	0.00	N	0	N	500.00	0.00	2500.00
Wireless Equipment	Wireless Equipment	Phase 01	1	3000.00	3000.00	0.00	N	0	M	1000.00	0.00	3000.00

Job System

Bill To

Print

Printer Settings 815.500.0000

The Sales Summary also updates to show the Credit.

New Job

Job

Sales Summary

Work Order

Job System

Bill To

Tasks

Sched Values

Recurring

Job

Job Number 5096

Job Type Cell Backup

Job Status Order Parts

New System

Labor Units 5 (0 Used)

Customer 50801

Mel Monroe

123 Grace Valley Rd

Daphne, AL 36526

Site

Me's Cabin

123 Grace Valley Rd

Daphne, AL 36526

Sales Summary

Installs

Item Code	Description	Quantity	Amount
Cellular Equipment	Cellular Equipment	1	2500.00
Install Cell Backup	Install Cellular Backup	1	5000.00
Wireless Equipment	Wireless Equipment	1	3000.00
Total			\$10,500.00

Parts

Part Code	Description	Quantity	Amount
Total			\$0.00
Total Non Recurring			\$10,500.00
Total Non Recurring Billed			\$5500.00
Total Credits			\$5000.00
Balance to Bill			\$10,500.00

Recurring

Item Code	Description	Monthly Amt
Total Recurring		\$0.00
Total Recurring Billed		\$0.00

*****Important Note:** If the invoice being revised has been paid in full or has a partial payment applied, the system will still allow the revision to be completed. However, any existing payment must first be unapplied from the job invoice by creating a Negative Payment Batch.

After the revised invoice is generated, the payment can be reapplied to the updated invoice.

If the payment amount is greater than the revised invoice total, the remaining balance can be applied as an Advance Deposit, Unapplied Cash, or processed as a Refund.