

AIA Style Billing – Application Reversals

Last Modified on 09/11/2026 11:03 am EDT

To Reverse an AIA Style Billing Application, follow the steps below. There is currently no “ Reversal” button within the AIA Style Billing Module.

Work Order Tab

If an AIA Style Billing Application has not been generated, navigate to the Work Order tab within the job and select Sales Reversal. The reversal process is the same as it is for a standard job.

Job

Job	Customer 50801	Site
Job Number 5139	Mel Monroe	Mel's Cabin
Job Type CCTV-Res	123 Grace Valley Rd	123 Grace Valley Rd
Job Status Order Parts	Daphne, AL 36526	Daphne, AL 36526
New System		
Labor Units 0 (0 Used)		

Work Order Entry

Job Information

Job Number: 5139
Job Type: CCTV-Res
Description: CCTV - Residential/Small Comm
Tag Group: AL - Daphne
Branch: Alabama
HoldBack %: 0
Install Company: MI
Installer: [Dropdown]
Permits Required: [Checkboxes]
Permit 1: [Text]
Permit 2: [Text]
Permit 3: [Text]
Enable AIA Style Billing: [Checked]

Job System

Created: 9/8/2026
Prevailing Wage: [Dropdown]
Project Manager: [Dropdown]
Salesperson: AEB
P.O. Number: [Text]
Sold Date: 9/8/2026
Projected Start: [Text]
Projected End: [Text]

Billing

Sched Values: \$1,000.00
Recurring: \$0.00
Materials: \$0.00
Job Costing: [Text]

Buttons: Change Customer, Change Site, Sales Reversal, Apply, Create Template

A new Tab will be added to the Job toolbar labeled CO then the Job Number followed by an R. Negative lines will be added to each positive item that was entered on the Job for Scheduled Values, Materials, and Commissions.

This job is now locked down, and no further data entry may be performed for the Job with the exception of returning parts to stock and crediting off any invoices previously created for the Job.

AIA Style Billing Tab

If an AIA Style Billing Application was generated and you want to issue a credit before completing the Reversal, first navigate to the AIA Style Billing tab.

From the AIA Style Billing Tab select New.

Job
Job Number 5096
Job Type Cell Backup
Job Status Order Parts
Tools
New System
Labor Units 5 (0 Used)

Customer 50801
 Mel Monroe
 123 Grace Valley Rd
 Daphne, AL 36526

Site
 Mel's Cabin
 123 Grace Valley Rd
 Daphne, AL 36526

AIA Style Billing
 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	\$9,500.00	Finalized	500645

Contract Sum 10500.00 Total Billed Amount 1000.00 Balance To Finish 9500.00 Finalized Only

Buttons: Delete Preview Open **New** Close

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

AIA Style Billing - Job 5096 - Application 2
 Application Summary Scheduled Values

APPLICATION AND CERTIFICATION FOR PAYMENT

TO OWNER Mel Monroe
 123 Grace Valley Rd
 Daphne, Alabama 36526

FROM CONTRACTOR Sedona Security
 888 Maple St
 Suite 120-M
 Northville, MI 48868

CONTRACT FOR Mel's Cabin

PROJECT Mel's Cabin
 123 Grace Valley Rd
 Daphne, Alabama 36526

VIA ARCHITECT

Application No 1 **R**

Application Date 7/30/2026

Period To 7/30/2026

Project No

Contract Date 7/30/2026

Distribution to
☐ OWNER
☐ ARCHITECT
☐ CONTRACTOR

Required Sedona Office Invoice Fields
Category Installation - Installation
Description Installation Services - Installation Services

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

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)	% G/C	BALANCE TO FINISH (C-G)	RETAINAGE
			FROM PREVIOUS APPLICATION (D+E)	THIS PERIOD					
1	Install Cellular Backup	\$5,000.00	\$1,000.00	-\$500.00	\$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

Buttons: 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.

After the Billing Application has been credited, navigate to the Work Order tab and follow the reversal process described above to complete the reversal.
