

AIA Style Billing – How to Invoice Taxable Scheduled Values

Last Modified on 09/11/2026 11:12 am EDT

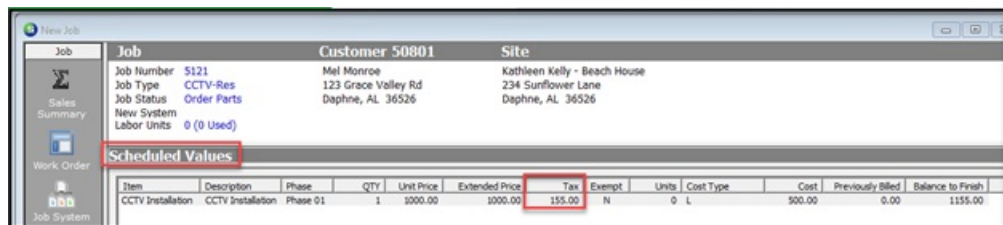
If a Scheduled Value is marked as Taxable, the applicable tax will be displayed for that line item on the Scheduled Values tab.

SedonaOffice automatically handles tax calculations for AIA Style Billing Applications.

AIA Style Billing Application – Continuation Sheet

When an amount is entered in **Column E – Work Completed**, the system automatically treats the entered amount as tax-inclusive when generating the AIA Billing Application. No additional tax will be calculated or added to the amount entered.

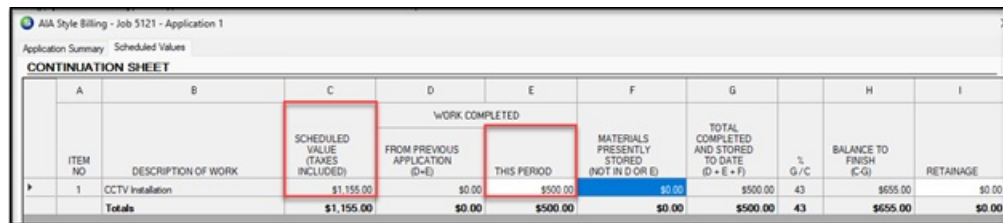
EXAMPLE: A Scheduled Value is \$1,000 and the Tax is \$155.



Item	Description	Phase	QTY	Unit Price	Extended Price	Tax	Exempt	Units	Cost Type	Cost	Previously Billed	Balance to Finish
CCTV Installation	CCTV Installation	Phase 01	1	1000.00	1000.00	155.00	N	0	L	500.00	0.00	1155.00

When a new Billing Application is created, **Column C – Scheduled Value (Tax Included)** displays the total amount for each line item, including both the Scheduled Value and the applicable Tax.

In this example, the Total amount displayed in **Column C – Scheduled Value (Tax Included)** is \$1,155.



ITEM NO	DESCRIPTION OF WORK	SCHEDULED VALUE (TAXES INCLUDED)	FROM PREVIOUS APPLICATION (D+E)	THIS PERIOD	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
1	CCTV Installation	\$1,155.00	\$0.00	\$500.00	\$0.00	\$500.00	43	\$655.00	\$0.00
Totals		\$1,155.00	\$0.00	\$500.00	\$0.00	\$500.00	43	\$655.00	\$0.00

If \$500.00 is entered in **Column E – Work Completed**, the system treats the amount as tax-inclusive.

When the AIA Billing Application is generated, the invoice displays a Scheduled Value of \$432.90 and Tax of \$67.10, resulting in a total billed amount of \$500.00.

*** AIA Style Billing Invoice - Accounting Data Locked ***

Customer ID

50801

Category

Installation

A/R Account

110110

Tag Group

AL - Daphne

Invoice #

500689

Hel Monroe

123 Grace Valley Rd

Daphne, AL 36526

Site Address:

Kathleen Kelly - Beach House

234 Sunflower Lane

Daphne, AL 36526

Invoice Date

8/19/2026

Aging Date

8/19/2026

Branch

Alabama

B.O. Number

Warehouse

Term

Due On Receipt

Invoice Type

Job #

Job

5121

Salesperson

AEB

Items \$432.90

Parts \$0.00

Item List

Show Custom Fields

Item	Description	Exempt	Qty	Rate	Amount	Memo
CCTV Installation	CCTV Installation	☐	1	432.90	432.90	

Description

Installation Services

Contact

Memo

AIA Style Application #1 - Kathleen Kelly - Beach House

234 Sunflower Lane

Sub Total

432.90

Tax

67.10

Total

500.00

Balance Due

500.00

☒ Complete
 ☐ Add to Print Queue

Last Printed: 1/1/2012

☐ Add to Email Queue

(No email address defined)

Invoice List

Print

Save

Close