

# The Evans Group LLC

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## **AIA BILLING – For Large Projects**

**Tired of fighting over a third, a third and a third . . .  
or late payments or much delayed final pays on projects?  
Give AIA Billing a review and save YOUR cash !\$\$!\$!**

**AIA billing** is a standardized method of construction percentage of completion contract billing developed by the American Institute of Architects (AIA) by which the contractor can apply for payment due and the architect can certify that the payment is due.

Typically, AIA billing consists of two forms:

- Contractors Application for Payment - ( request for payment ) – Form G-702
- Continuation Sheet - (a by-item detail sheet listing item prices and % of job completed to date). This is your Invoice to the customer. – Form G-703

To utilize AIA Billing you should establish these terms as part of your project contract.

When reviewing the contract with the customer, AIA billing should be described as your dealerships' project terms for jobs of their size. If the customer is unfamiliar you can let them know this is the American Institute of Architects defined process to handle large project billing in stages similar to home builder loans.

**Show Customers the forms** you will be using. Explain that your system will be billing in stages based upon percentages of job completion.

You will still bill the down payment, but then may bill as many as 5 additional times until the project is completed. Each subsequent billing will list items or change orders delivered and handled as well as the

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percent of job completion. (Note address, price and bill “change orders” as you go).

**On the internet, you will find a multitude of websites and businesses that furnish software and/or forms to handle AIA billing. Visit the AIA site at [www.aia.org](http://www.aia.org). Some of them even work with Quickbooks to save you time in completion. (Sunburst Software Solutions – [www.sunburstsoftwaresolutions.com](http://www.sunburstsoftwaresolutions.com))**

If a third party bank or leasing company is not involved, you may not need the request form for their sign off for funds release.

(See AIA Samples Below)

Happy Billing Trails!!!!

# The Evans Group LLC

**TO OWNER:** Joe (QB Job Record Contact) 800-773-8921  
(QB Job Record "Bill To")  
Customer Two  
Box 711  
Newport CA, 98755

**FROM CONTRACTOR:**  
Default Co. Contact from CAPS 802-895-8929  
Sunburst Software Solutions, Inc.  
2378 Dane Hill Road  
West Charleston VT, 05872

**PROJECT:**  
(QB Job Record "Ship To")  
Job #  
Job Name  
West Charleston VT, 05872  
**VIA ARCHITECT:**  
All Architect Info is held in CAPS  
Address Line 1  
Address Line 2  
City VT, 05872  
Architect Contact Name 800-623-DRAW

**APPLICATION NO:** 1  
**PERIOD TO:** 1/31/2004  
**PROJECT NOS:**  
Federal Proj # from CAPS  
State Proj # from CAPS  
Architect Proj # from CAPS

Distribution to:

<input type="checkbox"/>	OWNER
<input type="checkbox"/>	ARCHITECT
<input type="checkbox"/>	CONTRACTOR
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

**CONTRACT FOR:** Comes from QB Job Record->Job Info Tab->Job Description

**CONTRACT DATE:** 10/1/2003

**CONTRACTOR'S APPLICATION FOR PAYMENT**

Application is made for payment, as shown below, in connection with the Contract. Continuation Sheet is attached.

1. ORIGINAL CONTRACT SUM	\$	<u>336,000.00</u>
2. Net change by Change Orders	\$	<u>-</u>
3. CONTRACT SUM TO DATE (Line 1 + 2)	\$	<u>336,000.00</u>
4. TOTAL COMPLETED & STORED TO DATE (Column G on Continuation Sheet)	\$	<u>85,312.90</u>
5. RETAINAGE:		
a. <u>10</u> % of Complete Work (Columns D + E on Continuation Sheet)	\$	<u>8,531.29</u>
b. <u>10</u> % of Stored Material (Column F on Continuation Sheet)	\$	<u>-</u>
Total Retainage (Line 5a + 5b or Total in Column I of Continuation Sheet)	\$	<u>8,531.29</u>
6. TOTAL EARNED LESS RETAINAGE (Line 4 less Line 5 Total)	\$	<u>76,781.61</u>
7. LESS PREVIOUS CERTIFICATES FOR PAYMENT (Line 6 from prior Certificate)	\$	<u>-</u>
8. CURRENT PAYMENT DUE	\$	<u>76,781.61</u>
9. BALANCE TO FINISH, INCLUDING RETAINAGE (Line 3 less Line 6)	\$	<u>259,218.39</u>

CHANGE ORDER SUMMARY	ADDITIONS	DEDUCTIONS
Total changes approved in previous months by Owner	\$ -	\$ -
Total approved this month	\$ -	\$ -
<b>TOTALS</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>NET CHANGES by Change Order</b>	<b>\$0.00</b>	<b>\$0.00</b>

The undersigned Contractor certifies that to the best of the Contractor's knowledge, information and belief the Work covered by this Application for payment has been completed in accordance with the Contract Documents, that all amounts have been paid by the Contractor for Work for which Certificates for payment were issued and payments received from the Owner, and that current payment shown herein is now due.

**CONTRACTOR:** Sunburst Software Solutions, Inc.

By: \_\_\_\_\_ Date: \_\_\_\_\_

State of: \_\_\_\_\_  
County of: \_\_\_\_\_ (filled from CAPS)

Subscribed and sworn to before me this 14th day of July 2005

Notary Public: \_\_\_\_\_  
My Commission expires: 1/1/2010

**ARCHITECT'S CERTIFICATE FOR PAYMENT**

In accordance with the Contract Documents, based on on-site observations and the data comprising this application, the Architect certifies to the Owner that to the best of the Architect's knowledge, information and belief the Work has progressed as indicated, the quality of the Work is in accordance with the Contract Documents, and the Contractor is entitled to payment of the AMOUNT CERTIFIED.

AMOUNT CERTIFIED \_\_\_\_\_

(Attach explanation if amount certified differs from the amount applied for. Initial all figures on this Application and on the Continuation Sheet that are changed to conform to the amount certified)

ARCHITECT: \_\_\_\_\_

By: \_\_\_\_\_ Date: \_\_\_\_\_

This certificate is not negotiable. The AMOUNT CERTIFIED is payable only to the Contractor named herein. Issuance, payment and acceptance of payment are without prejudice to any rights of the Owner or Contractor under this Contract

Sunburst Software Solutions, Inc.

www.SunburstSoftwareSolutions.com

