

Start Here

October 6, 2026 | 90-fee edition

Save your files, make a working copy, then review your current fee practices before changing a price or service.

1. Save both product files

Your bundle contains a 275-page PDF book and a macro-free, 12-sheet XLSX workbook. This guide is a separate quick reference. No physical item or software subscription is included.

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Keep the downloaded originals untouched and save a separate workbook copy for your business. Open the book in a PDF reader and the workbook in desktop spreadsheet software. The workbook was recalculated and tested in LibreOffice. It has not been tested in Microsoft Excel or Google Sheets, and other apps may change formulas, formatting, dropdowns or protection.

Type only in the input cells, which are blue on the Fee Checklist and salmon on the model sheets. Keep protected formula cells intact. The workbook contains no macros or external workbook links, so it does not require macros to be enabled.

3. Review the 90-row Fee Checklist

The book holds 90 fees and programs in 12 sections: 13 six-page program chapters and 77 two-page fee cards. Read How to use this book on PDF page 6 and the workbook's Start Here tab. Then open Fee Checklist. Each of its 90 rows has a book entry, its payer and its PDF pages. All 90 start as Not reviewed.

Record current treatment, amount/currency/billing basis, collection status, next action, responsible owner and notes. An uncharged item may stay included, be declined or be irrelevant. The list does not recommend adding every fee.

Use the header filters to focus your review. Keep each fee's notes on its row. If you sort, first unprotect that tab and sort the entire table, not an individual column. Status counts show recorded entries; they do not certify a fee as ready to charge.

Turn selected findings into decisions

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4. Model a small set of relevant changes

The Fee Checklist covers all 90 entries in the book. Current Fee Inventory has 40 working slots, with eight sample entries. Candidate Fee Library has 15 sample charges from the book with synthetic numbers. These are different tools, not 90 completed financial models.

Replace Company Inputs and the synthetic sample assumptions with your own records. Manually enter selected fees in Current Fee Inventory, and note the inventory ID on the checklist. Recording a checklist item does not automatically add revenue to the model.

Use Included-vs-Add-On Matrix and Time-Cost Audit to check scope and delivery cost. Package Builder compares up to four packages that you define, Package A to Package D. Review conservative, base and upside cases in Revenue Scenarios.

5. Review before rollout

Complete Agreement-Disclosure Review, including local authority, agreements, disclosure, accounting and customer experience. Use your qualified advisers for the review your business requires. The book's starter agreement language is a drafting input for counsel, not a clause to paste into an agreement.

Assign an owner and timing in Rollout Planner. Confirm the correct software event captures the charge, then check posted charges and exceptions. The workbook does not connect to your property management system. In the book, amount ranges are what the cited sources print and every math table is a planning example. Samples and modeled results are not earnings or compliance promises.

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