AFINCADOS · HELP CENTER · FEES AND FINANCES

Calculating, editing and deleting regular fees

Split the annual budget across the properties and publish each resident fee.

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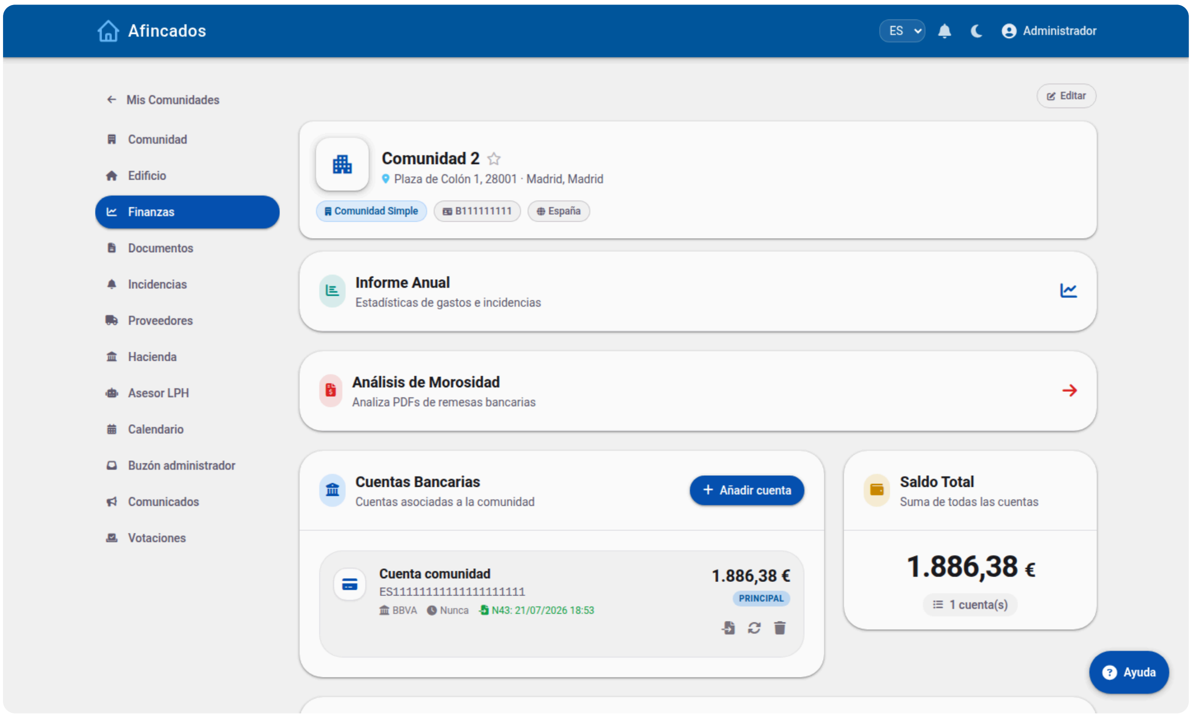
The **regular fee** is what each owner pays periodically to cover the running costs of the community. The application works it out for you: you enter the budget and it splits it across the properties according to their ownership share and the expense categories assigned to them.



Fees are calculated and reviewed from the Finances tab.

Before you start

- Every property must have its **ownership share**, and they must add up to 100.
- The **expense categories** must be created and assigned to the relevant properties.
- You need the **budget approved** at a meeting.

Creating the fees

1. Open the community and go to the **Fees** tab.
2. Click **Calculate fees**.
3. Select the **financial year** and the **frequency**: monthly, quarterly or annual.
4. Enter the **budgeted amount** for each expense category (cleaning, lift, insurance and so on).
5. Click **Calculate**. You will see a **preview** of what each property would pay, with nothing saved yet.
6. Review the table. If the split looks right, click **Save** to publish the fees.

As soon as you save, every resident sees their fee on their record and receives a notification.

Editing the fees

You can change the amounts while the financial year is still open:

- **Recalculate:** go back to **Calculate fees**, change the budget and save. The fees for that year are replaced by the new ones.
- **Adjustment:** the **Fee adjustment** option applies a percentage increase or decrease to every fee at once, without touching the budget. This is what you use when the meeting approves, say, a 5% rise. Before applying it you can generate a **simulation PDF** to present at the meeting.
- **Individual fee:** from a property record you can adjust that particular fee without affecting the others.

Deleting a fee

If you got the calculation wrong, open the fee and click **Delete**. This removes the fees of every property for that period, so only do it if they have not been charged yet. If you have already generated a bank direct debit file, cancel that first.

Reviewing and exporting

- **History:** shows the fees of previous financial years, useful for comparing how they have evolved.
- **Export to PDF or Excel:** produces the fee table so you can attach it to the minutes or send it to residents.
- **Import CSV:** if you keep the fees in a spreadsheet, you can upload them instead of calculating them.