Agreement Visit Budget

WORKSHEET / Type in the shaded boxes or print a fresh copy.

Start with one agreement fee, reserve the parts allowance, then enter the labor cost for all included visits.

01 Work through the example

	Example	Your case
Agreement fee	**660**	
Parts allowance	**105**	
Total visit labor cost	**240**	

Calculation: first amount minus the second and third amounts

Fee left after listed costs

The balance is available for travel, overhead and other unlisted costs.

02 Make a handoff note

Agreement reference

Included visit count

Next renewal review

Agreement Visit Budget

PRACTICE TEST / Use the example values on page 1.

1. With the example values, what is the fee left after listed costs?

- $318.00
- $315.00
- $323.00

2. If "Total visit labor cost" changes from 240 to 265, with the other example values unchanged, what is the new result?

- $315.00
- $290.00
- $297.00

3. Which action makes the most sense for this example?

- Review travel and overhead before setting the renewal price.
- Close the record and skip the next review.
- Assume the balance is final net profit.

What helped you, or what would you change?

Check your answers in Practice-and-Test.html for a score and an explanation of each answer. The PDF stores your selections when saved in a compatible PDF reader.