Selection and Allowance Tracker Guide

Compare selections with your builder's agreed allowances. Track complete installed costs, pending estimates and approved commitments by room and category to identify possible overruns before approving purchases.

1 Set up your allowance budgets

Replace the two example budgets on Allowances and their example items on Selections. Enter each room and category budget once in the yellow cells. Record the included scope in Notes. There are 20 budget rows and 100 selection rows.

Use identical room and category labels on both sheets. For a shared allowance, use Whole house as the budget group on both sheets. Do not repeat a budget for each item.

2 Enter selections and complete costs

Enter the item, numeric quantity and unit cost. Put units such as square feet in Notes. Product subtotal calculates quantity multiplied by unit cost. Enter tax, delivery, installation and builder markup as dollar amounts. Enter zero for a confirmed charge that does not apply; a blank means incomplete.

Projected total adds the product subtotal and these four charges. Confirm the markup basis with your builder. Record quote date, vendor, finish, waste allowance and lead time in Notes as needed.

3 Update the approval status

Pending uses projected cost in the forecast. Approved uses the full approved installed cost from the confirmed quote, order or builder approval, replacing the estimate. Replaced excludes an old option from both totals. Mark an old option Replaced before entering its replacement.

4 Review balances and warnings

Projected final combines pending estimates and approved commitments. Approved total counts approved selections only. Remaining is the allowance minus Projected final: positive means under budget; negative means over. Allowance and Remaining on Selections repeat shared figures and must not be summed.

Resolve Input review warnings before relying on totals. Missing costs or approvals can understate the forecast. Correct duplicate budgets and unmatched labels. Remaining does not confirm that every required selection has been entered.

5 Print share and keep current

Review changes with your builder and retain supporting quotes and approvals. Edit yellow cells and keep formula cells intact.

Print on Letter paper using each sheet's saved orientation. Selections prints across multiple pages with identifying columns and header rows repeated. Use Print Preview to select populated rows for printing or PDF export. Keep the LINEA logo and website visible when sharing.

Your signed agreement controls the allowance scope and approval process. This tracker is a budget aid and does not amend that agreement.

For more information visit teamlinea.com