

See the whole allowance before you approve it.

A four-page homeowner record for the signed allowance, selection cost, overage or credit formula, and written approval.

THE DECISION RULE

1. Copy what the signed allowance covers.
2. Attach the actual product quote.
3. Add tax, delivery, labor, and other written costs.
4. Apply the contract's markup or credit rule.
5. Approve one dated total in writing.

Project / property

Allowance category

Signed project total / contract date

Signed allowance amount

What the allowance includes: product / quantity / tax / delivery / labor

Markup percentage and exact base

Underrun / credit rule

Selection deadline and approval method

Boundary: This worksheet organizes homeowner-entered facts. It does not interpret a contract, determine tax treatment, verify invoices, or replace legal, tax, building, or trade advice.

Build the selection cost stack

Use the vendor quote and written contractor calculation. Write zero when a line truly does not apply; write 'unresolved' when it has not been answered.

Selected product / model / finish / quantity
Vendor / quote number / quote date
Product subtotal
Applicable tax and taxable base
Freight / delivery / handling / storage
Waste, accessories, or required components
Added or reduced preparation and installation labor
Other written cost or credit
Selection package subtotal
Less signed allowance
Pre-markup overage or underrun
Markup or credit adjustment
Final contract increase or credit
Revised signed project total

Compare up to three selections

Do not compare product prices alone. Carry each option through the same full formula and record any schedule, labor, warranty, or maintenance difference.

Comparison line	Option A	Option B	Option C

Preferred option and why
Questions that must be resolved before approval
Known schedule effect
Known warranty / maintenance difference

Approve one written record

Attach the selection quote, contractor calculation, and the signed change or credit. Make sure the revised total and payment schedule agree.

Approved product / model / finish / quantity
Final selection package subtotal
Allowance applied
Markup or credit rule applied
Approved contract increase or credit
Revised signed project total
Payment schedule line changed
Schedule effect
Approved by homeowner / date
Approved by contractor / date
Record revised date

Keep with: signed contract, allowance schedule, product quote, order confirmation, approved change or credit, updated payment schedule, receipt, warranty, and closeout records.