IPA Allocations Screen Requirements

**Executive Summary**

**(1) Background**  
Innovations for Poverty Action (IPA) are seeking the development of a custom page to manage Allocation records. Allocations are child records of Opportunities that track payments towards outbound grants.

There are two Opportunity record types in use that interrelate to each other: Grant Awards and Subawards. Subawards are child records to Grant Awards; a Grant Award could have multiple Subawards, although they usually have just one child Subaward record.

Grant Awards (the parent Opportunity records) have rollups populated with totals from the Allocation object. This information is used to display how much money has been allocated and how much money remains to be allocated.

Allocation records can be related to both the Grant Award (parent Opportunity) and the Subaward award (child award); they are always related to the Grant Award (parent Opportunity) and *can* be related to the Subaward.  
  
**(2) New Functionality**  
IPA would like a new button named “Manage Allocations” on the Grant Award (parent Opportunity) and Subaward Opportunity that navigates users to a custom page.

This page will feature a “Create New Allocation” button on the top of the page that allows users to create a new Allocation record. Below the button will be two lists: the top list will include key Parent Award details; below *Parent Award Details* there will be an Allocations related list.

*Parent Award Details* will display rollup fields from the Grant Award record so that users can easily see how much money remains to be allocated.

The Allocations related list will display related Allocations data. Users should be able to edit and delete records directly from this list. When updates are made to Allocations data, the rollups on the Parent Award Details list will update on the screen in real-time, allowing users to manage all childed Allocation records in one place.

**UI/UX Requirements:**

* The “Manage Allocations” button should be available to click from both the Grant Award (parent Opportunity) record and the Subaward Opportunity.
* The “Create New Allocation” button should use the Allocations page layout currently in use.
* *Parent Award Details* rollup math needs to recalculate live on the page without needing to refresh the page. These fields should be read-only to all profiles except System Administration.
* Allocations Related list:   
  + Allocation.Name should be linked/clickable to open record in new tab.
  + Subaward\_\_c should be linked/clickable to open record in new tab.
  + Project\_\_c should be linked/clickable to open record in new tab.
  + If “Allocation Type” = ‘Internal Subaward’ or ‘External Subaward’, the Subaward\_\_c lookup field will show on the screen. Otherwise, Subaward\_\_c is not visible to users.
  + User should only be able to select/associate Subaward Opportunities related to the Parent award.
  + Grant Allocation fields should be editable, respecting Field-Level Security.
  + The list should include “Edit” and “Delete” options for each record. If a user selects “Edit”, a modal should open with the Allocation page layout and a Save button.
    - Users should NOT be able to inline edit these related lists.
  + Users need to be able to filter by the picklist values in Allocation\_Type\_\_c. When users come back to the page, the filter should be refreshed, so that results aren’t filtered unless explicitly filtered as a user action.
  + This related list needs to be exportable to Excel using a button named “Export Allocations to Excel”.

**Logic Requirements**

* Parent Grant Award Record ID will be automatically associated to new Allocation records upon record creation.
* Code should respect existing code in triggers that prevent saving of records.
* All existing profile and FLS permissions should be respected.
* Users should be presented with a dismissable warning when the Total\_Unallocated\_Amount\_\_c rollup on the parent award is greater than $0.00 upon loading the page the first time.
  + The warning will read: *{!Total\_Unallocated\_Amount\_\_c} has not been allocated. Please allocate these funds at your earliest convenience.*
* Users should be presented with a dismissable error message when the Total\_Unallocated\_Amount\_\_c rollup on the parent award is greater than $0.00 after updating or creating Allocation records.
  + The warning will read: *{!Total\_Unallocated\_Amount\_\_c} still remains unallocated. Please allocate these funds at your earliest convenience.*

**Fields to Display in Each List**  
  
Parent Award Details (Grant Award Opportunity):

* Opportunity.Name
* Total\_Funding\_Amount\_\_c
* Total\_Allocation\_Amount\_\_c
* Total\_Unallocated\_Amount\_\_c
* Cumulative\_Spend\_to\_Date\_\_c
* Total\_Amount\_Proposed

Allocations Related List:

* Allocation.Name
* Subaward\_\_c
* Allocation\_Type\_\_c
* IPA\_Allocation\_Code\_\_c
* Project\_\_c
* Status\_\_c
* Amount\_Allocated\_\_c
* Budget\_Holder\_\_c
* Location\_of\_Work\_\_c
* Managing\_Team\_\_c
* Funding\_Team\_\_c