Grants Management Module



Open-source and built for Odoo Community Edition.

SIMULA



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What is the Grants Management Module?

The Grants Management Module is a specialized solution built for Odoo Community Edition that helps donors manage the entire grants lifecycle.

It centralizes grants, applications, approvals, payments, and financial tracking in one transparent and fully traceable system.



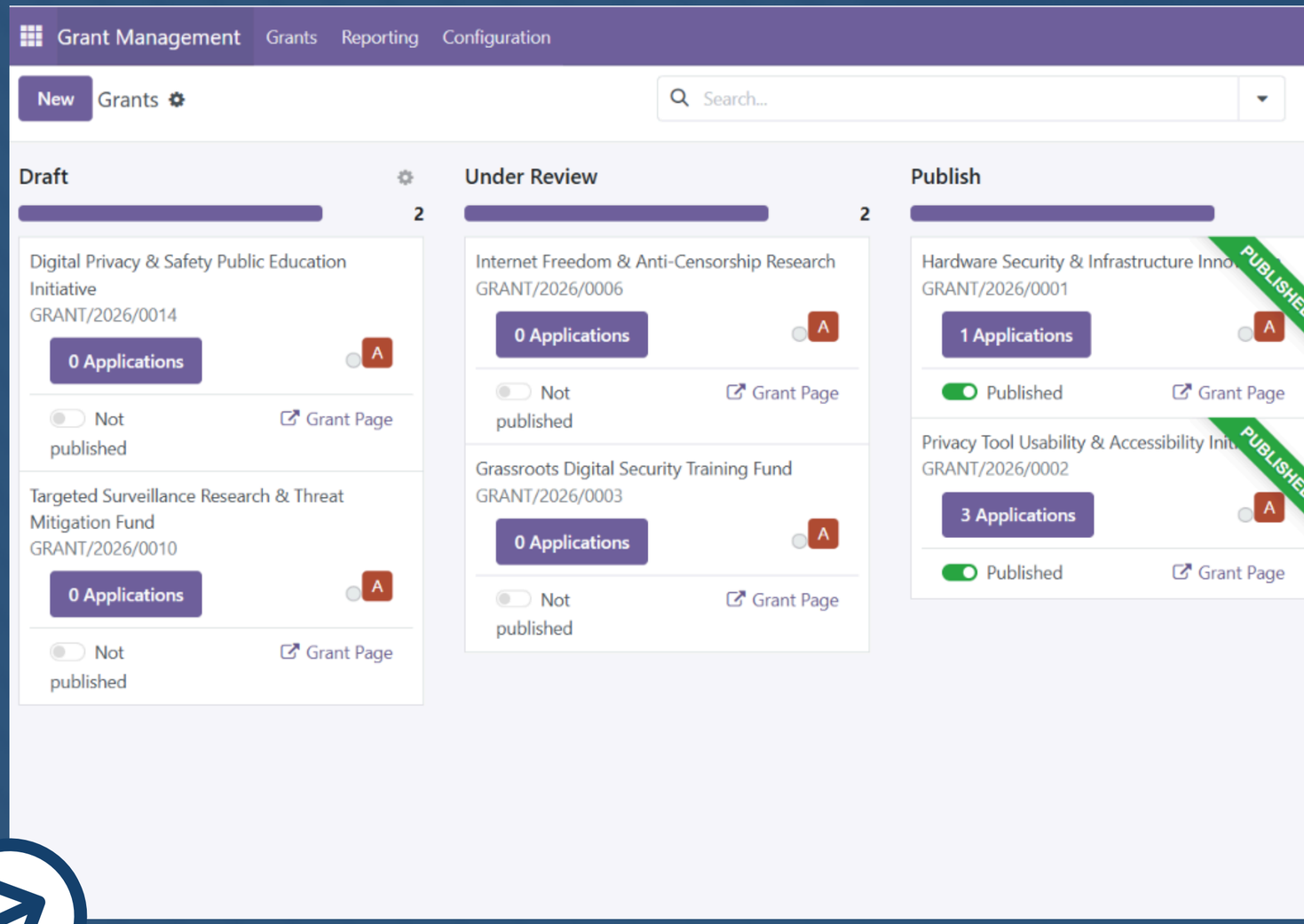
A specialized solution developed by Simula Lab

Key Features

Grants Management Cycle

Manage grants from initial draft to public launch:

- **Grant Lifecycle:** Draft, Under Review, Published & Cancelled.
- **Grant Configuration:** Set budgets, applicant limits, categories & grant types.
- **Application Requirements:** Define mandatory and optional documents.
- **Approval-Based Publishing:** Control when grants go live on your website.

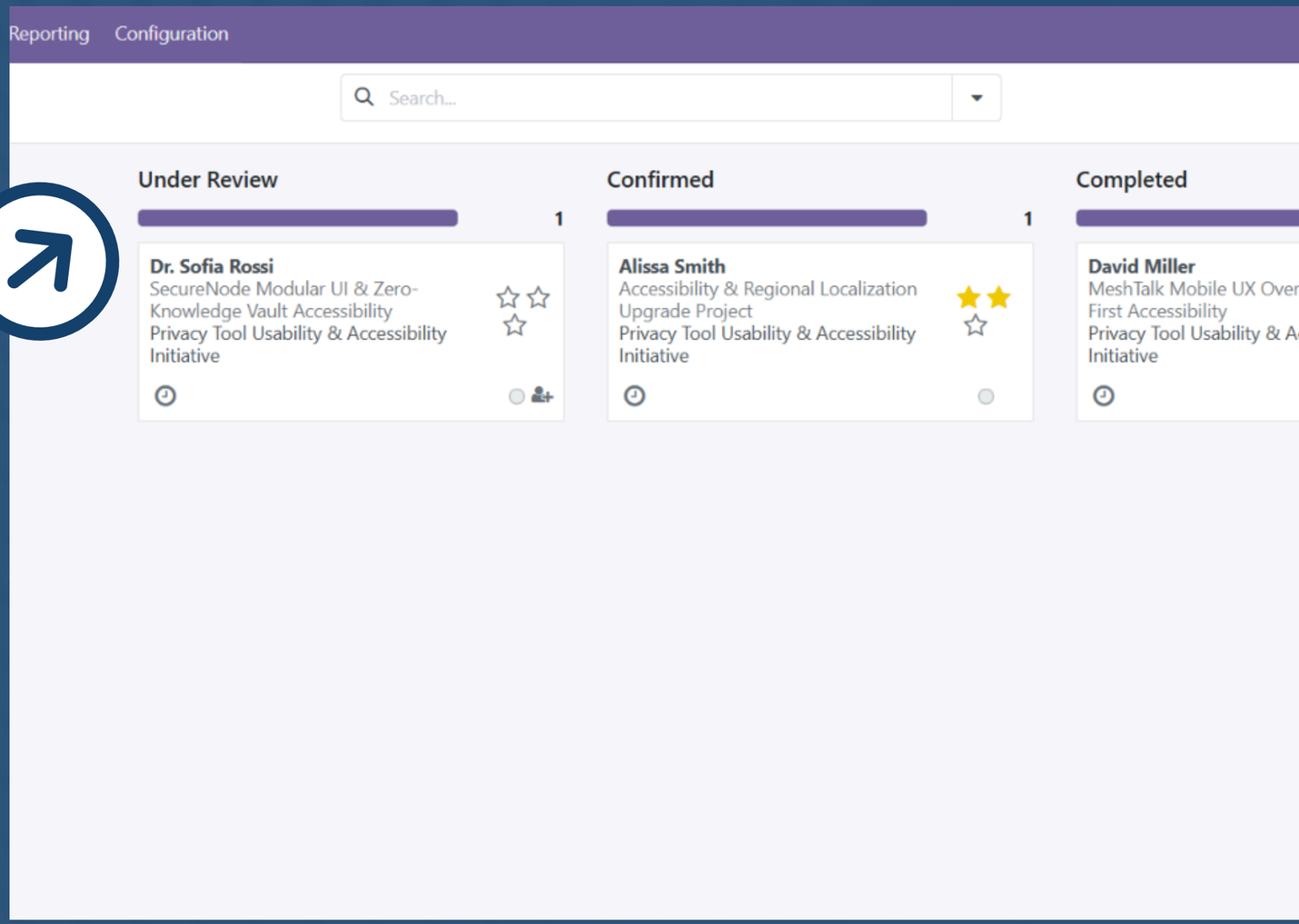


Key Features

Accepting & Managing Applications

Streamline application collection, review, and evaluation:

- **Automated Intake:** Collect applications via website or email.
- **Application Tracking:** Monitor submissions through every stage.
- **Reviewer Assignment:** Assign reviewers and record evaluation scores.
- **Customizable Workflows:** Configure evaluation stages to match your process.

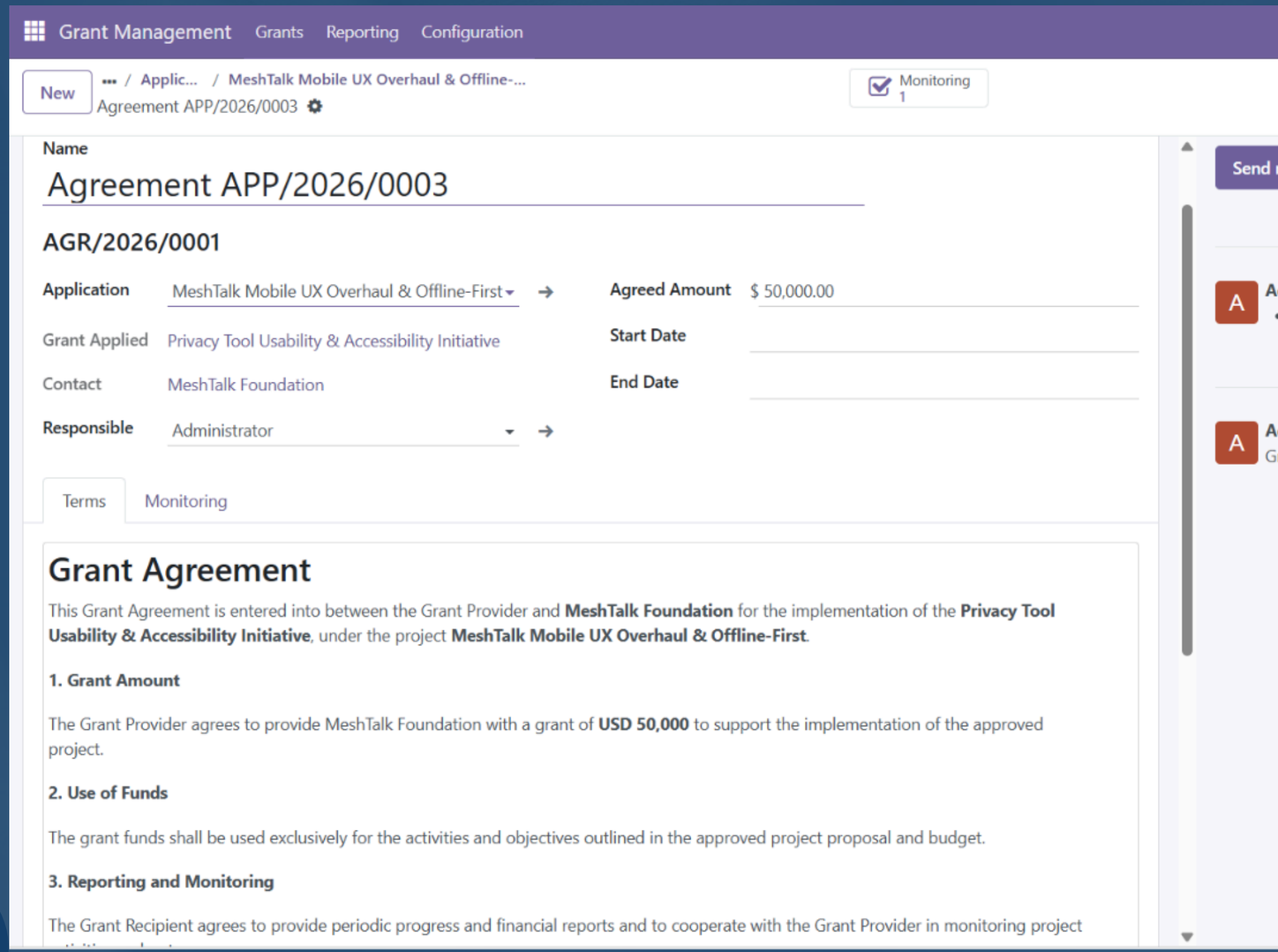


Key Features

Agreement & Monitoring

Formalize agreements and track project milestones throughout the grant lifecycle.

- **Agreement Generation:** Generate grant agreements upon application approval.
- **Compliance Tracking:** Monitor agreement terms and obligations.
- **Milestone Monitoring:** Track project progress and deliverables.

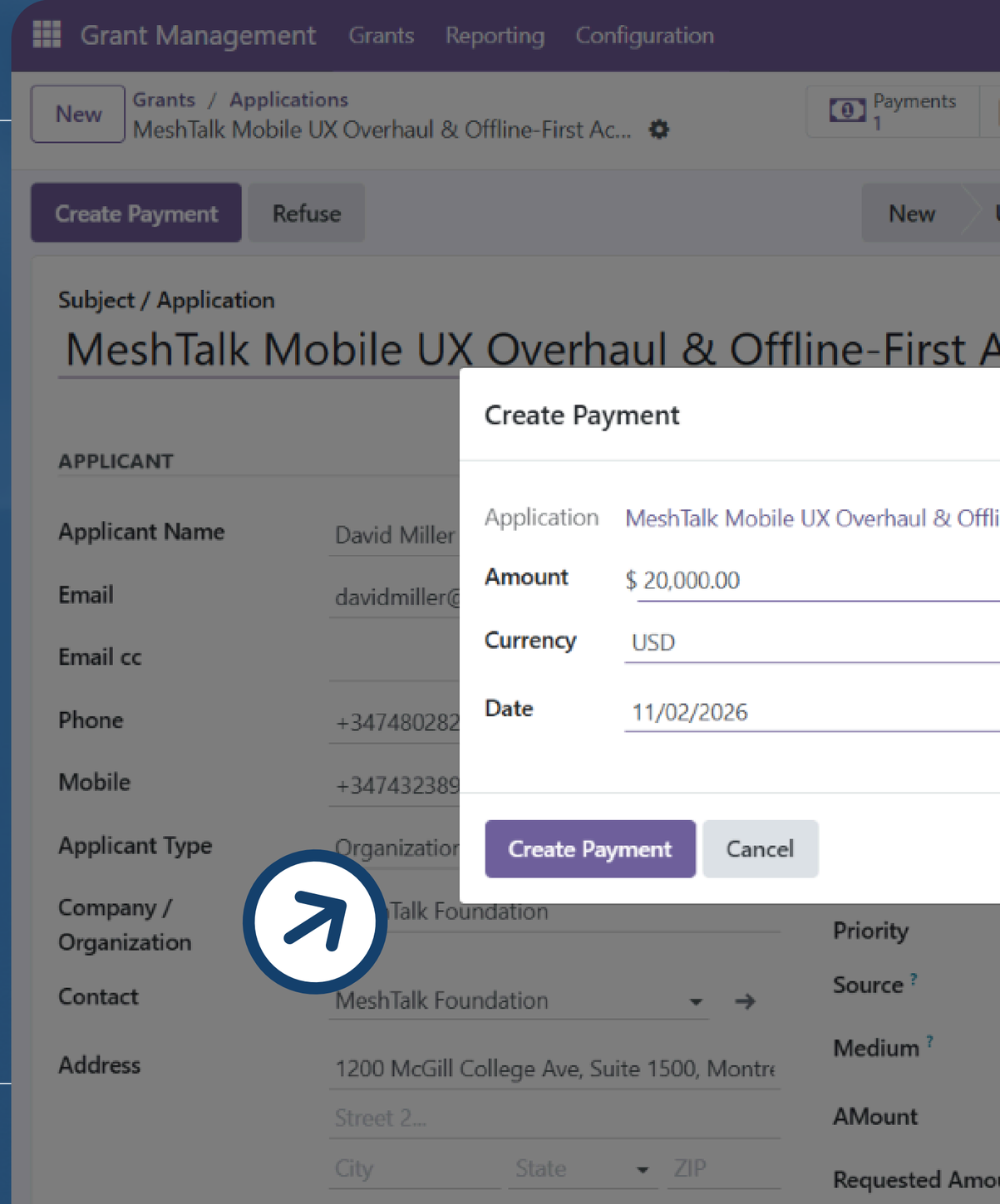


Key Features

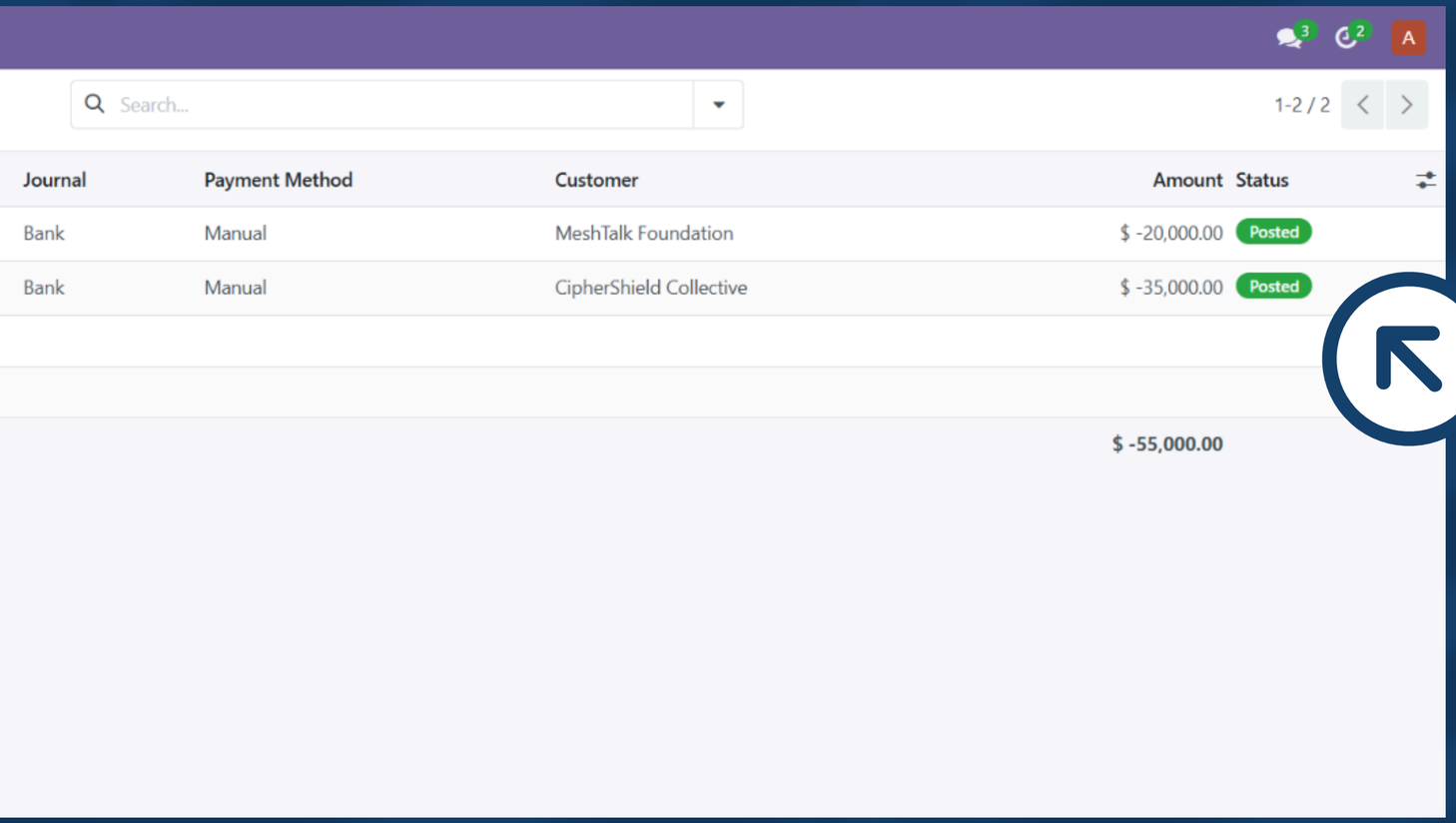
Payments Management

Ensures controlled and secure payment disbursement through role-based permissions and approval stages.

- **Direct Payment Creation:** Create payments from approved applications and record payable obligations.
- **Authorized Approvals:** Restrict approvals and payment initiation to adminstrators only.



Key Features



Accounting Integration

Connect grant payments with accounting for real-time financial visibility.

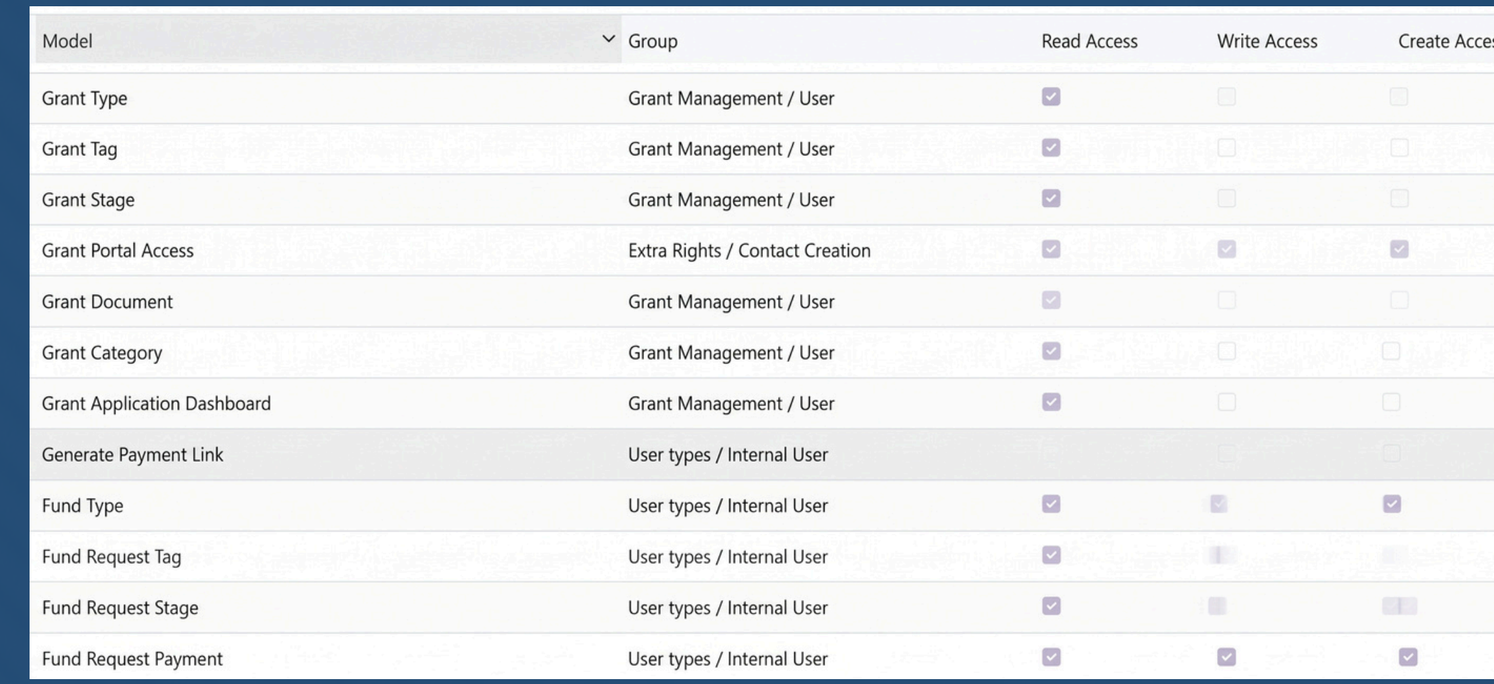
- **Direct Integration:** Link grant payments to accounting records.
- **Dynamic Budget Tracking:** Automatically update committed, spent, and remaining funds as payments are processed.

Key Features

Role-Based Access Control

Control access and responsibilities across the grant management process.

- **Administrator Control:** Full visibility and control over grants, settings, and applications.
- **Restricted Reviewer Access:** Limit reviewers to applications under their assigned grants.



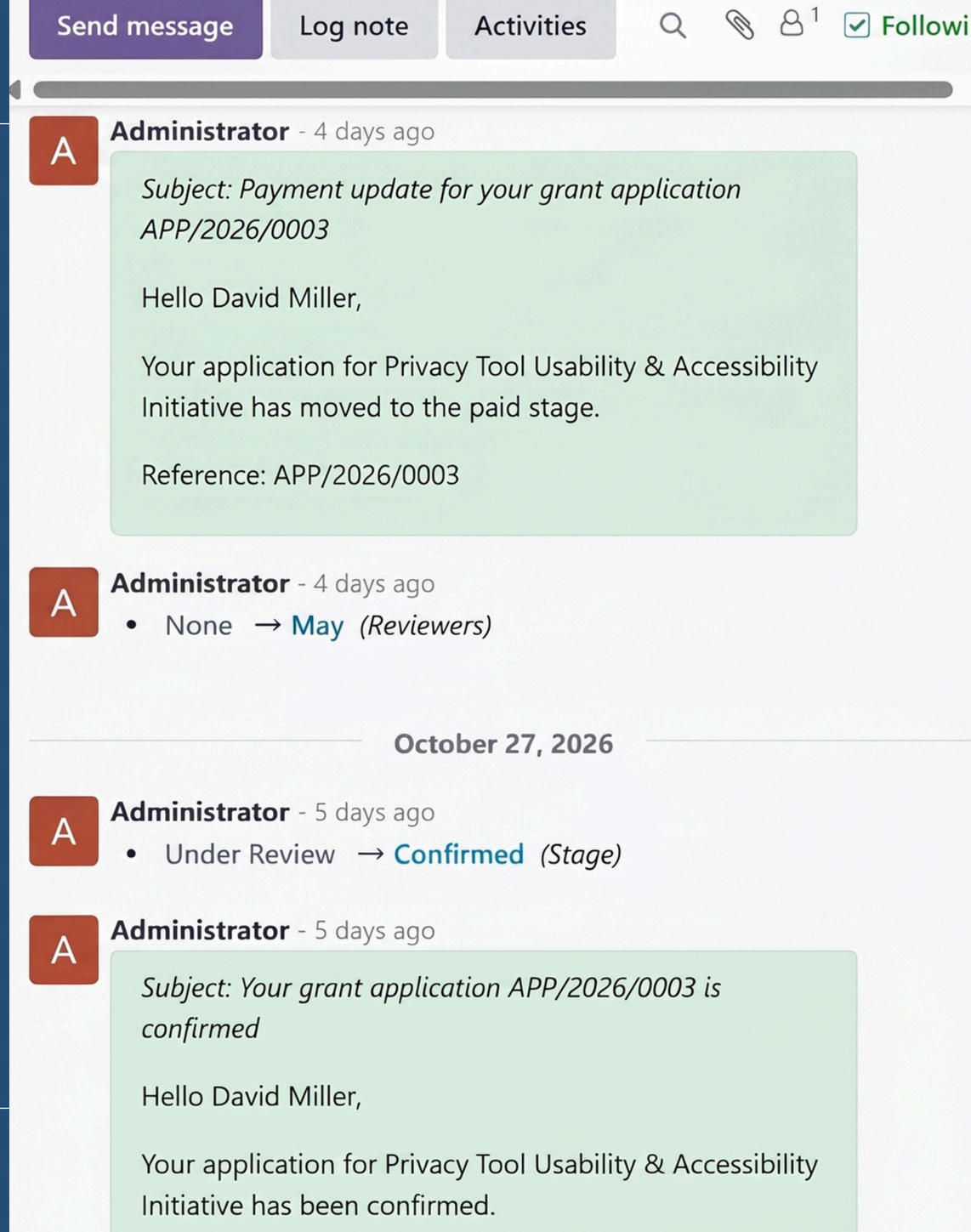
Model	Group	Read Access	Write Access	Create Acces
Grant Type	Grant Management / User	☑	☐	☐
Grant Tag	Grant Management / User	☑	☐	☐
Grant Stage	Grant Management / User	☑	☐	☐
Grant Portal Access	Extra Rights / Contact Creation	☑	☑	☑
Grant Document	Grant Management / User	☑	☐	☐
Grant Category	Grant Management / User	☑	☐	☐
Grant Application Dashboard	Grant Management / User	☑	☐	☐
Generate Payment Link	User types / Internal User	☐	☐	☐
Fund Type	User types / Internal User	☑	☑	☑
Fund Request Tag	User types / Internal User	☑	☐	☐
Fund Request Stage	User types / Internal User	☑	☐	☐
Fund Request Payment	User types / Internal User	☑	☑	☑

Key Features

Automatic Email Communication

Automate application intake and keep applicants informed.

- **Automated Status Notifications:** Notify applicants of status changes using standardized email templates.
- **Email-Based Application Intake:** Convert emails sent to dedicated grant aliases into applications automatically.



SIMULA

Open technology. More control.

Simula helps organizations deploy open-source infrastructure, implement Odoo, manage and protect their data, and run AI in private environments.

We serve a diverse range of clients across 20 countries. Our solutions and consultancies have successfully implemented over 50 projects worldwide.