Help Guide for Applicants

SmartyGrants provides an easy way for grant seekers to complete their application form online. This guide will explain the essential steps you need to take to complete and submit your form.

Some of the features of SmartyGrants are:

- You can save your progress and return to complete your application at a later time or date;

- Your application is stored online, therefore there is nothing for you to save to your own computer, and;

- You can be certain that a grantmaker has received your application when you submit it.

This feature is relevant to Australia and New Zealand applicants only.

In addition, you have the option to create a SmartyFile profile for your organisation.
SmartyFile allows organisations to collaborate with team members, pre-fill information into forms and manage, view, search and sort submissions across multiple funders in one spot.
To learn more go to applicanthelp.smartygrants.com.au/smartyfile

Download a PDF copy **of this guide here.**

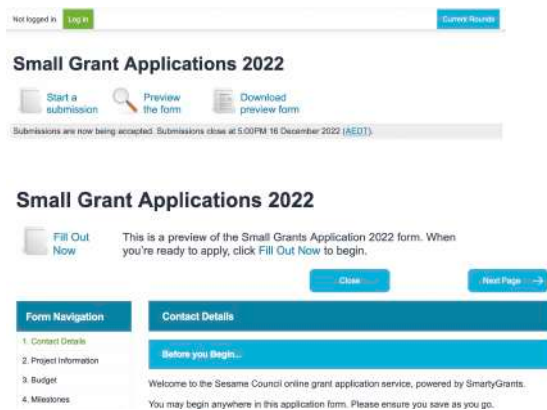**Table of Contents**

Step 1 - View and Navigate the application form

View the Form	When you first access SmartyGrants you will be directed to the Grantmaker's (funders) applicant homepage. Here you will see all of the rounds that the Grantmaker has either currently available or upcoming.
	Clicking on the round's link will take you to the application form. You have the following options: **Start a submission**, **Preview the form** or **Download preview form** (provides a PDF version).
	Note: You can't fill out the form while in preview mode. In order to complete the form you need to complete Step 2.
Navigate	You can navigate through the application form either by clicking on buttons above the form to move between individual pages.
	You can also use the navigation panel to jump to a specific page.
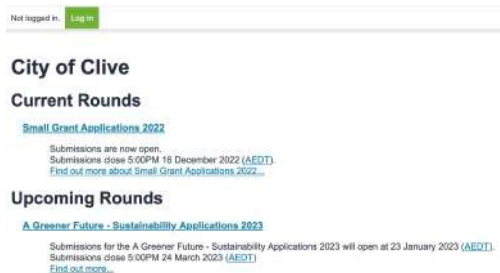
Step 2 - Apply and register

Apply	When you are ready to start your application, simply click on the **Fill Out Now** or **Start a submission** button
Small Grant Applications 2022
Fill Out Now — This is a preview of the Small Grants Application 2022 form. When you're ready to apply, click Fill Out Now to begin.
Close |
| Login and Register |
Login or Register
A free account is required to make an online submission.
Registration gives you secure access to your forms, allowing you to save your progress and resume later.

Log In / Register
Email:
yourname@example.com
Password:
Forgotten your password?
By clicking **Log In** you agree to Our Community's Privacy Policy and Terms of Use.
Log In

In order to make an online submission you will need to register as a user (this is a free user account).

Registration gives you secure access to your forms, allowing you to save your progress and resume later.

Once you have registered an account, you will use the same username and password for any additional applications you may create in the future by any grantmaker using SmartyGrants to manage their funding.

> **Handy Tip!**
> A handy tip is to take note of the web link (URL) / pathway you are using for your application. Each grantmaker has a unique link for their site. You might even like to "Bookmark" the link or add the link as a "Favourite" within your internet browser. This can be particularly helpful if you intend on creating multiple applications across multiple grantmakers.

For New Accounts

Registration
Please register as a new user. If you already have a SmartyGrants or SmartyFile login, you can log in here.
Your Name:
Organisation: Optional
Email Address:
Confirm Email: Re-enter your email address to confirm it.
Your password must:
- include at least 8 characters
- include uppercase letters
- include lowercase letters
- include a non-alphanumeric character (i.e., a symbol)
Password:
Confirm Password: Re-enter your password to confirm it.
By clicking **Register** you agree to Our Community's Privacy Policy and Terms of Use.
Register

If you do not have an account you will need to provide your details and create a password. Click on **Register**.

Once you have clicked Register an **activation email** will be sent to the registered email address.

Your will find an email from 'service@smartygrants.com.au', click on the link to activate your account.
If you do not receive an email, please check your **SPAM** email folder.

For Existing Accounts

Log In
Email:
yourname@example.com
Password:
Forgotten your password?
By clicking **Log In** you agree to Our Community's Privacy Policy and Terms of Use.
Log In |

Simply fill in your login details and you will be directed to the Grantmaker's available rounds page.

Have you forgotten your password? Click on the 'Forgotten your password?' link. This will ask you to insert your username (email address), following which an email with a reset password link will be sent. Click on the link and you will be prompted to set a new password.

SmartyFile is an additional tool for grant seekers. Once registered with SmartyGrants, you can create a SmartyFile profile for your organisation.

A SmartyFile profile allows you to:

- Login to SmartyFile and any sites powered by SmartyGrants.

- Collaborate with other team members on SmartyGrants submissions.

- Set up multiple team members as users for your organisation with different access levels.

- Automatically pre-fill your organisational and contact information into SmartyGrants forms.

- Manage, view, search and sort submissions across multiple funders in one spot.

Go to app.smartyfile.com.au and use your SmartyGrants user details to login.

*Please note that an ABN/NZBN is required to create an organisation profile.

For help and further information on SmartyFile please go to applicanthelp.smartygrants.com.au/smartyfile

Step 3 - Fill out the application form

Save Progress	It is highly recommended that you click **Save Progress** every 10 to 15 minutes when you are filling out a form. The form will also automatically save when you move from one page to the next.

When you are logged in, there is a limit to the time of your 'session' duration. For example, if you leave your computer idle for a length of time without saving your work, and then return, the session duration may have ended (or been timed-out).

Logout timer: 20 Minutes

What activities will reset the logout timer after you are logged in?

- Navigating between pages of the form

- Saving

What happens if the timer expires (reaches 0)?

You will be shown a login option again. If you successfully enter your login details you will be returned to the page you were viewing.

> **Please note:** If you were filling out a form, we attempt to retain any changes you have made, so you can continue working on the form after you log back in. To avoid losing your work **we recommend that you Save Progress regularly**.

| Elements of the page | The following elements can be found on the application form.

Page Buttons
Using these buttons allows you to navigate between the different pages of a form. You can also Save your progress, or Save and Close your form, in order to return to it at a later time or date.
Note: Your application form is saved every time you navigate between pages.

Navigation Panel
You can quickly jump to various pages in the form using the form navigation panel.

Form Questions/Fields
Provide responses to the form questions/fields.

Current Rounds Page

At any time you can return to the grant round homepage by clicking on the **'Current Rounds'** link/button on the top right hand side of the page.

 |
| Fill in the form | You can now complete the application form by providing the required responses.
If you are a member of an organisation that has a SmartyFile profile, you will be prompted with the question: On whose behalf are you making this submisson? This gives you the option to select a SmartyFile organisation you are a member of, or the option of on behalf of an individual or Other, for example, a partner or group that may not have a SmartyFile profile. You can then complete the form.
If you are completing the form on behalf of an organisation that has a SmartyFile profile, you will have the option to pre-fill the organisation contact information and bank details, when clicking into a pre-fillable field. If you have logged into SmartyFile and completed your 'My Profile' details, they will also be available for pre-fill.
If you are not a member of a SmartyFile organisation your are brought to page 1 of the form and can begin.

 |
| Attaching files | If you are attaching files, you need to allow for sufficient times for the file to be uploaded to the page. You should not navigate to another page until the file has been successfully attached, otherwise the file upload will be cancelled.

Please Note: There is a maximum file limit of 25 megabytes. However, it is strongly recommended you try to keep files under 5 megabytes. |

For a full list of supported file types click here.

To **attach a file** you will be given a 'Choose files' option or a 'Browse…' option (dependent on the browser you are using). Click on either of these options, select the file you wish to attach.

Financial Statement
Attach a file: Choose files No file chosen

Financial Statement
Attach a file: Browse... No files selected.

The file will begin to upload, when the upload is complete a link to the uploaded file will be available, along with the option to remove the file.
Note: ensure that your file is named clearly.

Financial Statement
Attach a file: Browse... No files selected.
Filename   2022-2023 Financial Statement.docx   Remove
File size   11.6 kB

| Save and Close | If at any stage you wish to save your application and close it you can do so by clicking **Save and Close**. |

← Previous Page   Save Progress   Save and Close   Next Page →

You can return to your application at any time prior to the closing date of the grant round and continue your application, simply by logging back into your account per **Step 2.**
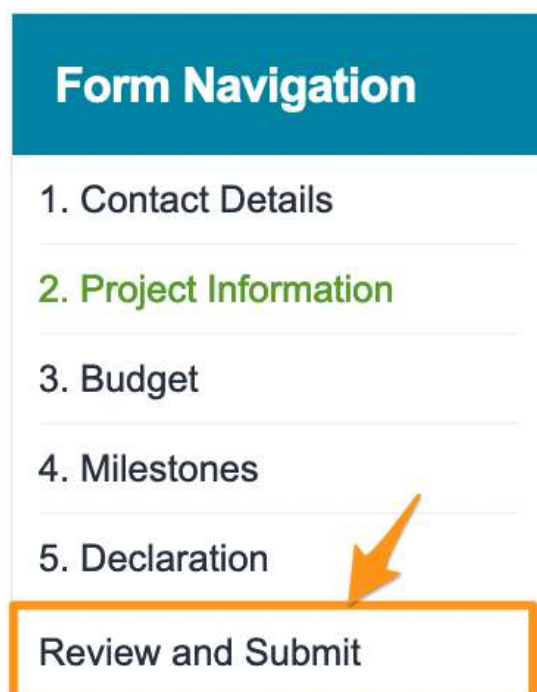
Once you log back in you can click on **"My Submissions"** - here you will find a listing of all applications you have begun to fill in and all that are completed.

Logged In: My Submissions Log Out   Current Rounds

Step 4 - Review and Submit

| Review, addressing issues and Submit | When you have completed the last page of the application form you can click **Review and Submit** in the navigation panel. |

Form Navigation

1. Contact Details

2. Project Information

3. Budget

4. Milestones

5. Declaration

Review and Submit

This will allow you to Review the full application before confirming you would like to Submit. Any items that need to be addressed, for example a required field that has been missed, will be highlighted in red, and you can navigate to the relevant page to make any edits.

You also have the option to download a PDF of the form to save or print.

*Note, when you Submit, you will receive a confirmation of submission email with a PDF of the submitted form attached. You can also log back into SmartyGrants at any time and view your completed application. This will appear under the **My Submissions** tab.

Important!

> **Once your form has been submitted, you are unable to make any changes.** If you do require changes to be made, you will need to contact the funder directly and enquire as to whether they can re-open your form.

When you have reviewed your form and ready to submit, click **Submit.**

Step 5 - Confirmation

Confirmation of Submission	You will receive a confirmation message on screen that your application has been submitted and the funder has received your application. You will also receive a confirmation email with a PDF copy of your submission attached (excluding file uploads - however, file names will still be shown for reference).

Optional - Submitting multiple applications

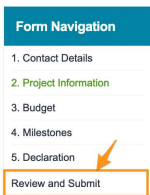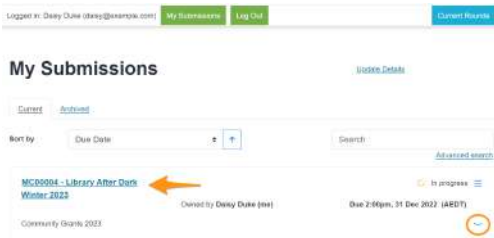| Start another submission	Depending on the Grantmaker, you may be able to submit multiple submissions in the same grant round. To start another submission, you must return to the Current Rounds page, click on the **Current Rounds** link/button in the top right hand corner. You will then be notified that you have already made a submission and be given the option to **View Your Submission**, **Start New Submission**, **Preview the form** or **Download preview form**. Click on **Start New Submission** to begin a new submission.

Small Grant Applications 2022

You have already made a submission. Click the View your submission icon to review what you submitted.

🔍 View Your Submission   📋 Start New Submission   🔍 Preview the form   📄 Download preview form

Submissions are now being accepted. Submissions close at 5:00PM 16 December 2022 (AEDT).

Multiple Submissions	To view and access all of your submissions, you will need to be logged into your account on the grantmaker's funding site and then click on **My Submissions**. Alternatively, you can log into app.smartyfile.com.au if you wish to view or manage submissions across multiple grantmakers, in one place.
	You can then choose which application you wish to access/continue, by clicking on the appropriate submission link or by clicking on the drop down arrow (note, any additional form the funder requires you to complete will be accessed the same way).

Optional - Viewing / Saving / Printing applications

If you wish to save a copy or print your submission you will need to download a PDF version. There are a couple of ways to access the option to download a PDF.

Forms in progress	Simply click on **Review and Submit** in the form navigation panel. You will then see a **Download PDF** button at the top of the form.
	Start by clicking on the **Review and Submit** link at the bottom of the navigation box.
Forms submitted	Once submitted, you will receive a confirmation of submission email with a PDF copy of your form attached. Alternatively, you can login to the grantmaker's funding site and access the form under **My Submissions** (where you can also search and sort submissions). Click on the relevant submission link, then click on the PDF icon if you wish to download a copy. This includes finding any additional forms the Grantmaker may ask you to complete.
	Note: If you wish to access submissions across multiple funders or share/collaborate with team members, you can login to app.smartyfile.com.au. If you do not already have an organisation profile, you can create one and add team

	members. Click on **My Submissions** once logged in. For further information and help on functions available visit applicanthelp.smartygrants.com.au/smartyfile
Accessing additional application information	Information about an application can be viewed by clicking on the application ID number from the My Submissions page. This will show a pop-up with additional information. See an example below: • **PDF** - clicking this icon will download a PDF copy of the application. • **Stage** - this may appear on certain applications where the grant funder wishes to communicate which stage your application has reached within their process (e.g. assessment stage, approved etc.) • **Forms** - all forms linked to the application will be listed here, starting with the application form.
Accessing acquittals or subsequent forms	Grant funders may add additional forms to your initial grant application form, such as acquittals or milestone reports. To view additional forms, you can either: 1. Select the small blue down arrow and then click on the name of the form you wish to access: 2. Click on the application ID to view a pop up with additional information about the application. Then click on the relevant form name there:

Optional - Request a Variation

Request a Variation	Certain applicants will have the option to request a variation form. If this is applicable to you, please select the down arrow on the right hand side of your submission:

OPEN00001 - Community project   ✅ Submitted ☰

Owned by **Abbie Applicant**   Submitted 12:30pm, 16 Nov 2023 (AEDT)

Always Open   Total amount requested: $10,000.00

Then select **Start a Variation request**:

OPEN00001 - Community project   ✅ Submitted ☰

Owned by **Abbie Applicant**   Submitted 12:30pm, 16 Nov 2023 (AEDT)

Always Open   Total amount requested: $10,000.00 ︿

Application Form   Submitted 12:30pm, 16 Nov 2023(AEDT)   ✅ Submitted

Start a Variation request

This will create a Variation request form for you to fill out and submit. The funder will then process your variation.

Optional - Update your account details or password

Update details	To update your name or change your password, head to the **My Submissions** page and click on **Update My Details**
Change your email address	To change the email address associated with your account you will need to email service@smartygrants.com.au. **We will need any request to change an email address to be sent from the originally registered email address.**

Optional - Change owner of a submission

Update owner/user of a submission	If you want access to update who the owner/user is of submissions you will need a SmartyFile organisation profile. If you are an individual and not part of an organisation, you can contact the funder directly to request the change. If you do not already have an organisation profile, you can create one and add team members by heading to app.smartyfile.com.au. Once you have added team members to your organisation profile (or your organisation's Administrator has), you may have access to change the owner on a submission. Navigate to **My Submissions** and click on the hamburger icon on the relevant submission, you will see a **Change owner** option. This will then give you a list of team members of your organisation that you can assign the submission to.

For further information and help on functions available visit applicanthelp.smartygrants.com.au/smartyfile

Optional - Share a submission

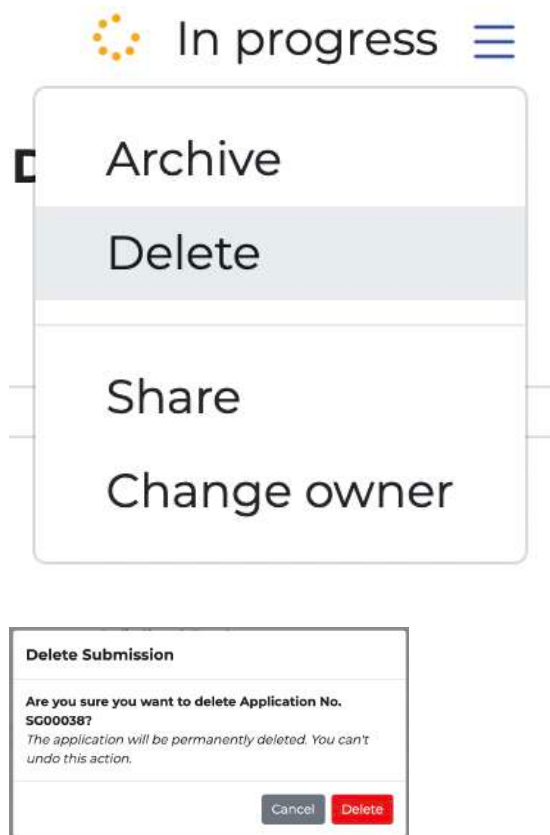| Share a submission	If you want access to share submissions you will need a SmartyFile organisation profile.
	If you do not already have an organisation profile, you can create one and add team members by heading to app.smartyfile.com.au . Once you have added team members to your organisation profile (or your organisation's Administrator has), you may have access to share the submission with team members who have been given the appropriate permission within your SmartyFile organsation. Navigate to **My Submissions** and click on the hamburger icon on the relevant submission, you will see a **Share** option. This will then give you a list of team members of your organisation that you can share the submission with.
	For further information and help on functions available visit applicanthelp.smartygrants.com.au/smartyfile

Optional - Delete & Archive Submissions

Delete	You have the ability to delete submissions with an 'In progress' status that you may have started in error.
	This can be done when logged in to the funder's applicant site or through SmartyFile (app.smartyfile.com.au) . Once logged in via either site, click on **My Submissions**, and click on the hamburger icon on the relevant submission.

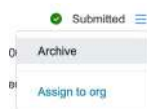Click on the **Delete** option.

Archive/Unarchive	You can archive a submission that you no longer want to see on the default (current) view tab. You may want to do this for any past submissions that are completed and have no further action required (such as reporting back to the funder). Note that archived submissions can always be reactivated to the current tab if needed.
	This can be done when logged in to the funder's applicant site or through SmartyFile (app.smartyfile.com.au) . Once logged in via either site, click on **My Submissions**, and click on the hamburger icon on the relevant submission.
	Click on the '**Archive**' option:
	To **Unarchive**, click on the **'Archived'** tab under my submissions. Click on the hamburger icon next to the relevant submission and select **'Unarchive'**.
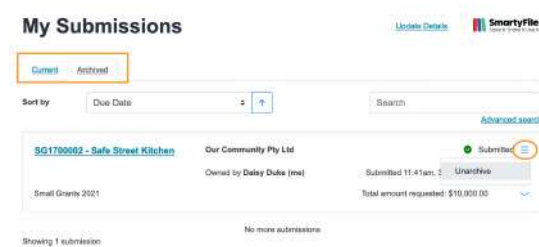
FAQ's

For a full list of frequently asked questions please visit applicanthelp.smartygrants.com.au/applicant-faq's .