Applicant Help Guide

SmartyGrants provides an easy way for funding applicants to complete their applications online. This guide will explain the essential steps you need to take to complete and submit application forms.

Some of the features of SmartyGrants include:

- You can save your progress and return to complete your application at your convenience,
- Your application is stored online, therefore you can access it on other devices, and
- You can be certain that the funder has received your application when you submit it.

📄 SmartyFile is relevant to Australia and New Zealand-based applicants only.

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.

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Step 1 – Navigate to the funder's application portal

To begin a submission, you'll first need to navigate to the funder's application portal. This link will typically end in *.smartygrants.com.au*.

Each funder has their own unique application portal. You'll need a link to this site before you can start. You can often obtain this link through the funder's own website, in their promotional newsletters, or similar.

Within each link, you can find any current and upcoming rounds listed for that funder.

✅ **Tip:** Take note of the web link (URL) you are using to access a funder's application portal. You might even like to "Bookmark" the link or add the link as a "Favourite" within your web browser. This can be particularly helpful if you intend on creating multiple applications across different funders.

Step 2 – View the round and application form

To view the application form, select the name of the round or **Find out more about (round name)**.

On the round page, you will typically find key information about the round, such as the

Current Rounds

Small Grant Applications 20___ ←

Submissions are now open.
Submissions close 2:00AM 31 May 20___ (___).
→ Find out more about Small Grant Applications 20___ ...

eligibility criteria, guidelines, dates and timelines, or similar.

If the round is **Current**: • To preview the application form, select **Preview the form**. • To download a PDF version of the form, select **Download preview form**.	**Community Grants Round 20XX** Fill Out Now Preview the form Download preview form Submissions are now being accepted.

> ℹ️ **Note:** You can't fill out the form in preview mode.

If the round is **Upcoming**, you may or may not be able to preview or download the form. This will depend on whether the funder has allowed for the application form to be visible before the round opens. If you don't see the option to preview the form, you will need to wait until the round is open.	**Youth Grants 20** This round will open at 30 June 20 ( ) for submissions. IMPORTANT: Please read information below to assist you in completing your application online. **BEFORE YOU BEGIN**

Step 3 – Login or register

You need a user account in order to start an application. If you have submitted an application via SmartyGrants before, you can log into your existing account. Otherwise, you will need to register. > ℹ️ **Note:** Once you have registered your email, you won't need to register again. This is true even if you want to apply to rounds from different funders. You can use the same user account to apply to any funder using SmartyGrants.	**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 If you haven't registered or started filling in a form, register here. **Password:** Forgotten your password? By clicking **Log In** you agree to Our Community's Privacy Policy and Terms of Use. Log In

Login

To login with an [existing user account](#):

1. Enter in the username (email address) into the **Email** field.
2. Then enter in the account's password into the **Password** field.
3. Select **Log In**.

> ℹ️ **Note:** If you've forgotten your password, see help on how to reset it [here](#).

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

Register

To register a user account:

1. Select **register here**.
2. Complete the required fields, then select **Register**.
3. Once you have entered in your details and selected the register button, SmartyGrants will send an activation email to the email address you entered. To activate the account, navigate to that email account's inbox, open the activation email, and select the activation link.

> ⚠️ **Important:** An activation email may take up to 15 minutes to arrive. If you don't see the email in your inbox, check your junk or spam folder.

4. Once your account is activated, you can go back to the funder's application portal and log in using the login [steps here](#).

If you haven't registered or started filling in a form, [register here](#).

Registration

Please register as a new user. If you already have a SmartyGrants 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

> ⚠️ **Important:** You won't be able to login until the account is activated.

> ℹ️ **Note:** You won't receive an activation email if you already have a SmartyGrants account under that email address. If this is the case, you can [reset your password](#) to

log in.

Step 4 – Start an application

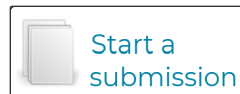|	
To begin an application, select the name of the round or **Find out more about (round name)**.	**Current Rounds** Small Grant Applications 20___ ← Submissions are now open. Submissions close 2:00AM 31 May 20__ (____). → Find out more about Small Grant Applications 20___ ...
If you have not logged in, select **Start a submission**. You will be prompted to **log in**.	Start a submission
If you have already logged in, then select **Fill Out Now**.	Fill Out Now

Step 5 – Fill out the application form

Session timer & saving your progress

When you log into SmartyGrants, you are on a timed session. This timer is 20 minutes.

While filling out a form, you can reset the timer by any of the following actions:

- Selecting the **Save Progress** button,
- Selecting the **Save and Close** button,
- Selecting on either the **Previous Page** or **Next Page** buttons.

⚠️

Important: If you do not save or navigate between pages within 20 minutes, you'll be timed out. Timing out will log you out, and you'll lose any unsaved work.

If the session times out, you will be shown a **Log In** prompt. If you successfully re-enter your login details, you will be returned to the page you were viewing. You should then select **Save Progress** to save any unsaved data.

To avoid losing your work we recommend that you **save regularly - at least once every 10-15 minutes**.

Session Timed Out

Your session has timed out, you will need to login again before making any further changes.

Close   Log In
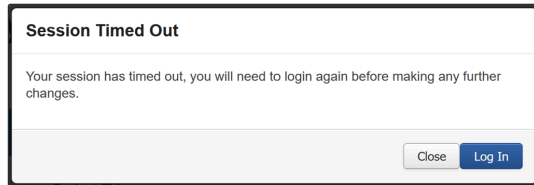
Page Buttons

Using these buttons will allow you to navigate between different pages of a form. They are found at the top and the bottom of the application form.

You can also **Save Progress**, or **Save and Close** your form to return to it later.

← Previous Page   Save Progress   Save and Close   Next Page →

Note: Your application form is automatically saved every time you navigate between pages.

Navigation Panel

You can also navigate between pages using the **Form Navigation** panel. The panel is found at the top of the page.

Each line of text represents a different page in the form. Select the name of the page to jump to that page.

Form Navigation

1. Contact Details

2. Project Information

3. Budget

4. Milestones

5. Declaration

Review and Submit
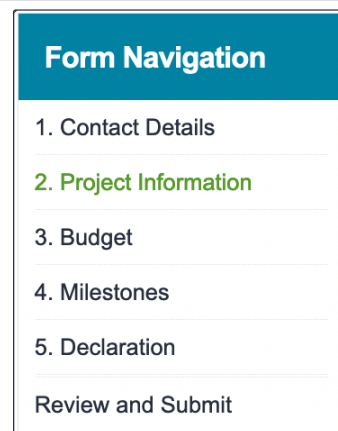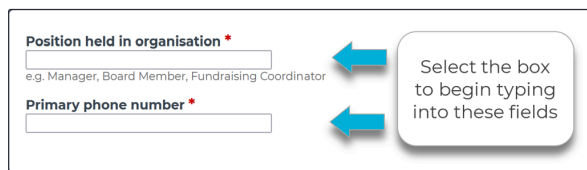
Form Questions/Fields

Provide responses to the questions/fields in the form.

Depending on the form you are filling out, you may be asked to provide your responses/answers using a variety of different methods. In addition to typed responses, some forms may require you to select specific elements, tick a checkbox, upload a file, and more.

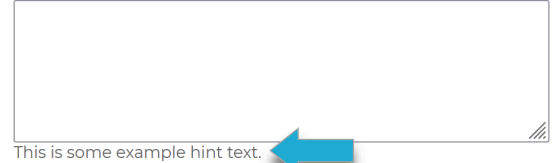> ℹ️ **Note:** Hint text can be found below or on top of some questions. This hint text can guide you on what response, and in what format, the funder is expecting you to provide.

Position held in organisation *

e.g. Manager, Board Member, Fundraising Coordinator

Primary phone number *

Select the box to begin typing into these fields
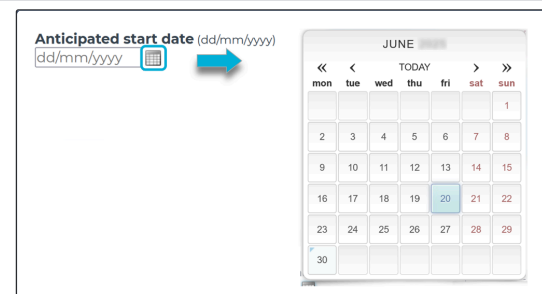
What are you expecting to achieve from this project?

This is some example hint text.

Below are some examples of fields that you may come across:

Date fields: Choose a date to enter in. You can either type in a date manually, or select the calendar icon to pick a specific date from the calendar window.
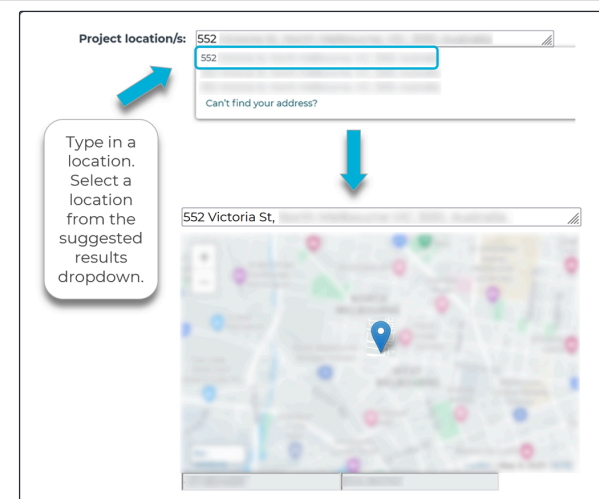
Anticipated start date (dd/mm/yyyy)

dd/mm/yyyy

JUNE

TODAY

mon tue wed thu fri sat sun

Location fields: Start typing in an address. Select the relevant suggested result, or if the address does not appear from the suggested results, select **Can't find your address?** to manually enter in those address fields.

Some forms may also display a map of the address when entered into an address field.
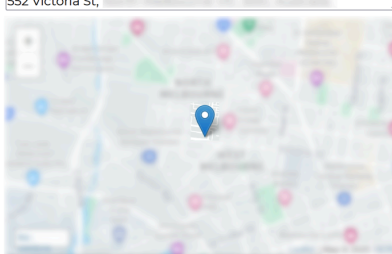
Project location/s: 552

552

Can't find your address?
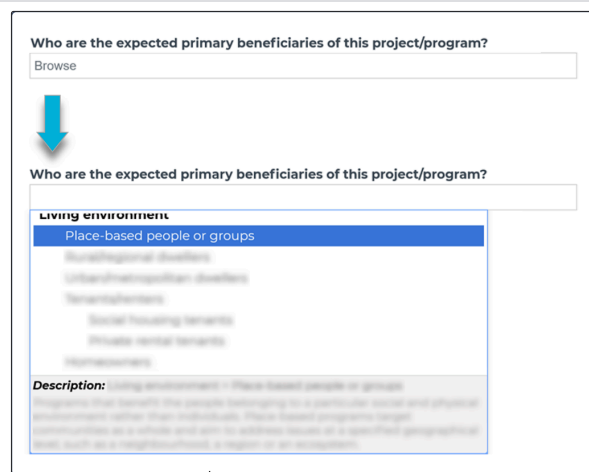
Type in a location. Select a location from the suggested results dropdown.

552 Victoria St,

Nested lists: You may need to 'drill down' to select an option from a drop-down list. After selecting **Browse**, you can navigate the window to the relevant category (in bold). Selecting the category will expand the options shown. You can select any non-bold option underneath.

Depending on the form, you may be able to select **Browse** again to add multiple responses.
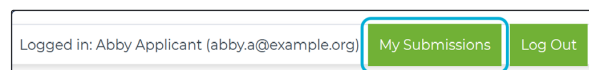

Save and close (return to the application later)

If at any stage you wish to save your application and return to it later, you can do so by selecting **Save and Close**.

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.

Once you log back in, you can select **My Submissions** to be taken to the My Submissions page - where you will find a listing of all your applications, including those that you have started to fill in or have already completed.
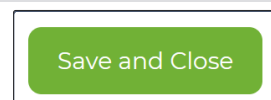
Attaching/uploading files

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

For a full list of supported file types, visit our page here.

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

To attach a file, you will be given a **Choose files** option or a **Browse...** option (*depending on the browser you use*). After selecting either option, search for and select the file you wish to attach.

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.

ℹ️ **Note:** Ensure that your file is named clearly to avoid confusion.

Step 6 – Review and submit

When you have completed the last page of the application form, you can select **Next Page** button, which will take you to the **Review and Submit** page. This page allows you to review your entire application in full before you submit it to the funder.

You can also access this page by clicking on the bottom entry of the **Form Navigation** panel.

Any items that need to be addressed before you can submit – for example, a required field that has been missed – will be **highlighted in red**. You can navigate to the relevant page to make any edits by selecting the **Go to page button**. For help with

troubleshooting any errors, you can [read our guidance here](#).

If you'd like to save a PDF copy before you submit, you can [follow the steps here](#). Just note that you'll automatically receive a PDF copy of your application attached to the confirmation email *after* you submit.

When you have reviewed your form and are ready to submit, select the **Submit** button.

⚠️ **Important:** Once your form is submitted, you can't make any changes. If you want to update or change the form, you'll need to **contact the funder directly** and ask whether they can re-open the form for you.

Step 7 – Confirmation

After you have selected the submit button, 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. Note that this PDF copy won't include any files you've uploaded, however, file names will still be listed on the PDF for reference.

Thank you, your submission has been received.

Submission Number: SG0001

A copy of your submission has been sent to your email address. You can also return and log in to this site at any time to view or download your submission. If you have any questions please contact us directly.

Optional features

- Optional – Submitting multiple applications
  - Start another submission
  - Multiple submissions

Optional – Submitting multiple applications

Start another submission

Depending on the funder, 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 (select the **Current Rounds** link in the top right hand corner), and select the name of the round again. In this page, you'll be notified that you have already made a submission. Select **Start New Submission** to begin a new application.

Multiple submissions

To view and access your submissions, you will need to be logged into your account on the funder's application portal (*ending in .smartygrants.com.au*).

Your submissions will be on the My Submissions page (which can be access by selecting the **My Submissions** link).

Multiple forms in one submission

Some funders may require you to fill out multiple forms under one application.

To view a full list of forms for a single application, navigate to the **My Submissions** page (which can be access by selecting the **My Submissions** link). Next to the Application ID, select the downward-facing arrow from the bottom-right hand corner of the box.

Any additional form(s) will be listed here. Click on the name of the form that you want to view or fill out.

Optional – Viewing / saving / printing applications

Downloading and printing your application

If you wish to save a copy or print your submission, you will need to first download a PDF copy. There are a few different ways you can download one.

In-Progress forms

- Simply select **Review and Submit** in the **Form Navigation** panel. You will then see a **Download PDF** button at the top of the form.

Submitted forms

- You can access the confirmation of submission email you received, as this will have a copy of the PDF attached.
- Alternatively, you can log into the funder's application portal (*ending in .smartygrants.com.au*) and access the form under the **My Submissions** page (where you can also search and sort through your submissions to that funder). Select on the relevant Application ID, then select the PDF icon to start the download.

Once you have a PDF copy of your submission, if required, you can print this file from your PDF viewing program of choice.

Accessing additional application information

Information about an application can be viewed by selecting the Application ID number from the **My Submissions** page.

This will show a pop-up with additional information. See an example below:

- **Status** – This will tell you whether or not a specific form has been submitted.
- **Stage** – This may appear on certain applications when the funder wishes to share with you the stage your application is at (e.g. Under Review, Approved, Acquittal Management).
- **Forms** – All forms linked to the application will be listed here, beginning with the first form you submitted for that application.

Accessing acquittals or subsequent forms

Funders may add additional forms into your existing submission, such as acquittal or milestone reports. To view additional forms, you can either:

- Option 1: Select the Application ID. A pop-up window will appear with additional information about the application. Select the name of the form you wish to access.
- Option 2: Next to the Application ID, on the bottom-right hand side of the box, select the small downward-facing arrow. In the list of form(s) that appear, select the name of the form you wish to access.
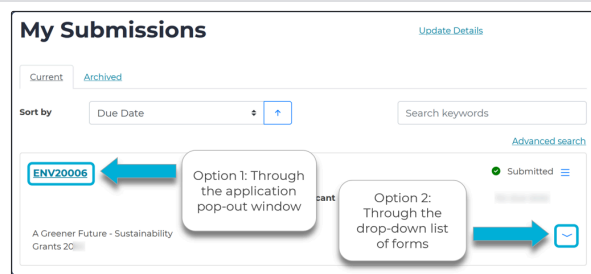

Optional – Request a variation

For certain applications, you may have the option to request a variation form. If this is applicable to you, to request a variation:

1. Next to the Application ID, on the bottom-right hand side of the box, select the small downward-facing arrow.
2. Select **Start a Variation request**.
3. This will create a Variation request form for you to fill out and submit. You can follow the same guidance from **Step 4 - Start an application and Step 5 - Fill out the application form** to complete and submit this form. The funder will then process your variation.

If you need to request a variation to your grant agreement, but the **Start a Variation request** button is not available, please contact the funder directly.
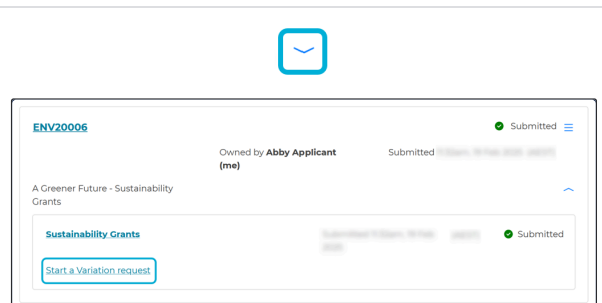
Optional – Change owner of a submission

If you want to update the owner/user of an application:

If you applied as an individual

Option 1: You can contact our support team. You'll need to contact us from the email address that currently owns the application, and in that email, you'll need to include the application ID along with the new owner's email address.

Option 2: If you do not have access to the email address that owns the application, you'll need to contact the funder directly to request the change.

> ℹ **Note:** Transferring an application updates the owner only. It does <u>not</u> update any contact details previously submitted in any form. To update those contact details, please contact the funder directly.

If you applied on behalf of an organisation

You will need a **SmartyFile organisation profile** to make this change.

If you do not already have an organisation profile, you can create one and add team members by heading to http://app.smartyfile.com.au. Once you (or an administrator) has added in team members to your organisation profile, you can change the owner on a submission. For more instructions, please visit https://applicanthelp.smartygrants.com.au/smartyfile/.

Optional – Share a submission

If you want access to share a submission, 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 http://app.smartyfile.com.au. Once you (or an administrator) has added in team members to your organisation profile, you can share the submission with team members who have been given the appropriate permissions. For more instructions, please visit https://applicanthelp.smartygrants.com.au/smartyfile/.

Optional – Update your account details or password

To update your name or your organisation's name on your account, or change your account password, follow the guidance here.

To change the email address associated with your account you will need to contact our support team. We will need any request to change an email address to be sent from the originally registered email address.

## Optional – Delete & Archive submissions

Delete

You have the ability to delete **In Progress** submissions only. To delete an In Progress submission, you'll first need to log into the funder's application portal (*ending in .smartygrants.com.au*). Once logged in:

1. Select **My Submissions**.
2. Next to the relevant application, on the right-hand side of the box, select the three-lines (hamburger) icon.
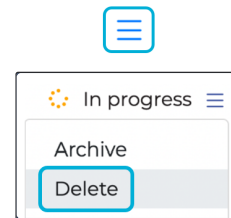
❌ **Warning:** Deleting an application <u>cannot be undone</u> - this is a permanent action. If you wish to proceed, select the red **Delete** button.
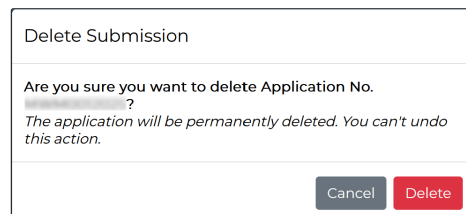
Applications with a Submitted status cannot be deleted. If you'd like to withdraw your application for any reason, we recommend contacting the funder directly.
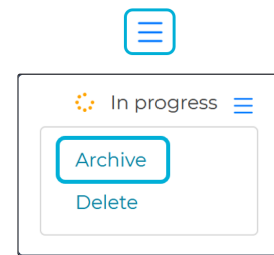
Archive

You can archive a submission that you no longer want to see on your current list of submissions. For example, you may want to archive past submissions that are completed and have no further action required.

ℹ️ **Note:** Archived submissions can always be unarchived if needed.

|	
To archive a submission, you'll first need to log into the funder's application portal (*ending in .smartygrants.com.au*). Once logged in: 1. Select **My Submissions**. 2. Next to the relevant application, on the right-hand side of the box, select the three-lines (hamburger) icon. 3. Select **Archive**.	
## Unarchive To unarchive a submission: 1. Select the **Archived** tab from the same My Submissions page. 2. Next to the relevant application, on the right-hand side of the box, select the three-lines (hamburger) icon. 3. Select **Unarchive**.	
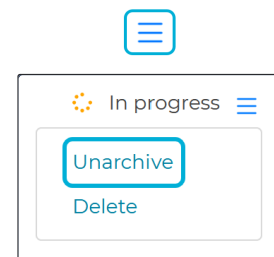
Frequently Asked Questions (FAQ's)

For a full list of frequently asked questions, please see our **FAQs page**.