# Workflow feature enhancements and Public Stage Names

## Questions & Answers

**Q:  Are we able to amend the public stage names or are they standard?**

A:  The public stage name list is standardised to ensure consistency for applicants and is maintained by SmartyGrants. If you have improvement requests with regard to public stage names, please email us at [service@smartygrants.com.au](mailto:service@smartygrants.com.au).

**Q:  Will applicants receive an email/notification of public stage name changes?**

A:  Applicants won't receive a notification, but if populated, the Public Stage Name is what they will be able to see on their application summary when logged into your applicant site or in SmartyFile.

**Q:  If you add an additional person's name into an existing recurring task, does it duplicate everyone else's task?**

A:  No – it would not duplicate the tasks already assigned to the original assignee/s. After updating a Recurring Task, the additional assignee/s take effect on subsequent triggers or 'runs' of the Recurring Task.

**Q:  Is it possible to bulk-create rules and stages that apply to multiple programs?**

A:  No. Workflows, Recurring Tasks and Rules sit at the program level, which means they can be configured uniquely to suit the needs of each program.

*Q: Can we assign the task to different people based on the response to a field in the form (e.g. applicant department)?*

A: At this point in time this is not possible. This property of Recurring Tasks was covered later in the Webinar.

*Q: What happens when you have multiple Rules and Stages based on the same decisions? For example, when an application is Ineligible we record the decision as Declined. We have Ineligible and Unsuccessful Stages and the decisions are both declined.*

A: At this point in time, the most-recently created Rule will take precedence and execute. However, it would be worth considering whether it is necessary to have these as discrete Stages.

If discrete Stages are a requirement, the application will need to be manually moved to the correct Stage after the rule is triggered. (.e.g. From Ineligible to Unsuccessful or vice-versa)

## Feedback Comments

**Is there a process available going forward IF there are suggestions for additional Public Stage Name? How were those listed initially chosen?**
**We would be keen on "To be paid", "Paid" and "Acquittal Overdue" public stage names.**

We do want to maintain standardisation of stages for applicants so that multiple funders are not referring to a stage in hundreds of different ways, for example, if it's similar or spelt differently, capitalised etc. We are very open to receiving suggestions for new stages and will review these against other public stage name suggestions received. These will be reviewed periodically and if appropriate the list of public stage names will be updated. This may mean in future that as new public stages are added, grantmakers need to review these and identify if they can use them or convert from a current stage to the new. Some

stages may not be an exact match but similar enough that it can be used.

Please send any public stage name suggestions along with a short explanation for those stages through to the SmartyGrants support team via [service@smartygrants.com.au](mailto:service@smartygrants.com.au)

Regarding 'To be paid', 'Paid' and 'Acquittal Overdue' – we are working towards to option for grantmakers to be able to publish payments for applicants along with payment status. This will become available to them via a 'Payments' list in SmartyFile and there will be links to payments from each individual application. More information on this will be announced through SmartyNews closer to rollout of this feature. Acquittal forms currently list the status, for example, whether they are overdue on the applicants submission, and email reminders can be set to send from SmartyGrants also.

**At the moment we generate a Grant Status report that shows applicants which stage their apps are in, but if these public stages were more specific, they could replace that report for us.**
I think the reference here is to whether you will be able to add your own custom stages to the public stage field. Please refer to the answer in comment above.

In addition, if you are not already doing it with your current grant status list, you could use the mailout/email function to explain to a filtered list of your successful applicants that:
a) that the application is successful; and
b) that they will be able to see the application progress through the stages and explain what those stage names are.

**For Rules: Are you considering in the future to include mailouts in the Actions when a decision has been made based on a mailout template?**
We will log this as an idea to consider for rules.

**Will new triggers be added to the auto list of choices?**
I think this is in reference as to whether new triggers will be added to creation of rules.
Yes, we hope to add new triggers in future and would love to hear feedback on what

triggers will be useful for our grantmakers. Please send through any suggestions you have to the support team via [service@smartygrants.com.au](mailto:service@smartygrants.com.au)

**Would SG consider for users to able to standardise our stages and rules to all programs?**

We will log this idea in terms of being able to manage this standardisation at an account level. You can still undertake this as a user group in your account by agreeing on which stages you should/need to use and creating the same stages in each program.

**Triggers based on Standard Field responses would be handy.**

Yes, we have heard this suggestion before and have it logged as an improvement.