

SmartyFile

Questions & Answers

Q: Are groups able to add multiple organisations under the one ABN?

A: Yes – it is possible to have more than one SmartyFile registered under the same ABN. This allows larger grant seeking organisations to manage their grant submissions on a department or group level.

Q: How do you edit the User Name?

A: The username is the initial email registered with SmartyGrants. If an applicant would like to update this, they will need to send us an email from the original address noting they would like the email changed. This can then be updated by us at SmartyGrants. Alternatively, grantmakers can update this on the manage end of SmartyGrants using the “Change User” button on an application record.

Q: As a grant provider, if we merge contact records with the same ABN, will this impact the organisations in their own Smarty File?

A: The contact fields in the manage end of SmartyGrants (i.e ABN numbers, organisation names etc.) do not affect the applicant's SmartyFile accounts.

Q: Will the expiry notification email only be sent to the administrator, currently it is being emailed to all users?

A: There is currently a fix in the works from our developers regarding the expiry notification email being sent only to administrators (rather than all users)

Q: Does the Mission Statement transfer over to Applications in a Standard Field?

A: This could be prefilled in the application form to any text answer question (whether a standard field or single question)

Q: Is the "Can submit" feature limited to the initial application form?

The Submit Items option is for all forms that are open on an application record. This is the initial application and/or acquittal forms too

Q: I am curious about whether the contributor role could allow referees to add their professional reference to individual applications? If so, is there the possibility to make this upload non-editable by the applicant?

following from this, can applicants allow an external collaborator to contribute to their application form by way of direct email or do they need to set them up in

smartyfile to grant access? (ideally with limited access so they won't have any edit rights to the application but can simply submit a separate form to be attached to the application)

An applicant would need to add the new user into their SmartyFile organisation (which is linked by ABN) and share the particular application with them. However, the user would then have full access to edit the application. It is not possible to limit editing to specific questions in the form.

Q: If you assign an application to an organisation, can the admins of the organisation automatically see it or do you need to share with individual users?

The applications will need to be both assigned to the organisation and shared with the user, unless they have “View All” access to submissions.

Q: Is there info/instructions that we can share with our applicants so they see how to use smartyfile?

We have our SmartyFile applicant help guide here that can applicant's can view here: <https://applicanthelp.smartygrants.com.au/smartyfile/> as well as our FAQ's here: <https://applicanthelp.smartygrants.com.au/smartyfile/#SmartyFile-FAQs>

The intended audience for this session and video recording is manage site users, but we are also revising our applicant help and may release some SmartyFile “how-to” videos in future.

Q: Are you aware if the funding body uses the Owner as the primary contact details/email address, or what email address is put into the application?

Generally speaking the ‘owner’ of the application is the individual email who initially started the application. This can be changed over the course of an applications lifetime or transferred to another email address. It may be different to the address filled out in the application form ?????

Feedback Comments

It would be useful to be able to use CRN or Inc Soc number (in NZ) instead as not all orgs have an NZBN. Ironically, the ones that don't have an NZBN typically need something like SmartyFile most.

We do have an ongoing list of improvements for SmartyFile and SmartyGrants – we'll be sure to take this feedback on board and pass it on to the product team for potential future implementation!