

Webinar: 19 December 2023



2023 Year in Review

Questions & Answers

Q: Hi, I have some applicants unable to locate their acquittal form, not clicking on the drop arrow for the form list. Any ideas?

A: Thanks for the question! We generally include a line to applicants in correspondence that says "Please note you must click the arrow to reveal your additional forms."

If this is something that is occurring regularly, please send us an email to service@smartygrants.com.au so that we can log this interface feedback with the team.

Q: Hi David, if you are printing off the application forms, how do those bigger spreadsheets print out?

A: Depending on the scale/size of the grid, they may need to be printed with a landscape layout (selected when you are printing the PDF, as opposed to within SmartyGrants)

Q: Hi, on 'Public Stage Name', how does 'Approved' or 'Unsuccessful' help? Coz this would be applied for all of the applications on the stages (which may include mix of application approved / unsuccessful)

A: The Public Stage Name functionality is intended to allow you to show your applicants the current stage their application when they are logged in to the Applicant Site and/or SmartyFile. As such, you would need 2 separate stages, i.e. one for Approved applications, and one for Unsuccessful applications and configure the Public Stage Name accordingly.

Of course, Public Stage Names is an optional feature that you may choose not to use depending on your organisation's requirements.

Feedback Comments

***Would be awesome if we could improve budget grids so that totals can be at the bottom of the relevant questions.
like 5***

Thank you for the suggestion - we will make a note of this feedback and log this with the team.

On Public Stage Names

Can we also include something for 'Payment in progress'? Any idea why the "Public Stage Name" list couldn't be customised?

I think "reporting upcoming and/or overdue" or something could be helpful for the applicant too.

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

Regarding 'To be paid', 'Paid' and 'Reporting 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 applicant's submission, and email reminders can be set to send from SmartyGrants also.