

Account Maintenance Checklist

ABOUT

This checklist is for Administrators of existing SmartyGrants accounts to refer to. For guidance setting up a new account, or creating a new program, please see our [Using SmartyGrants](#) section on the Help Hub and our [Getting Started Checklist](#).

This *Account Maintenance Checklist* is for SmartyGrants account Administrators to consult at least annually. This checklist should also be consulted when planning to make changes to your organisation's Grantmaking Lifecycle (i.e., the way your organisation uses SmartyGrants for grants management and record-keeping).

If you are not familiar with some of the terms in this document, please keyword search on the [Help Hub](#) for more information.

CHECKLIST

Programs	<input type="checkbox"/> Archive programs and rounds not in use <input type="checkbox"/> Keep the reply-to email up-to-date
Standard Fields	<input type="checkbox"/> Archive fields and categories that are no longer in use <input type="checkbox"/> Download the snapshot report to review fields in use
Contact Fields	<input type="checkbox"/> Archive fields that are no longer in use <input type="checkbox"/> Download the snapshot report to review fields in use
Contact Types	<input type="checkbox"/> Delete types that are no longer in use <input type="checkbox"/> Download the snapshot report to review contact types in use
Choice Lists	<input type="checkbox"/> Archive lists that are no longer in use <input type="checkbox"/> Check choices are updated <input type="checkbox"/> Download the snapshot report to review choice lists in use
Funding	<input type="checkbox"/> Create financial periods <input type="checkbox"/> Create budgets and/or budget allocations <input type="checkbox"/> Check any program operating as a multi-year funding program has been set up in relation to financial periods that span multiple years
Users	<input type="checkbox"/> Check access levels are set up correctly

	<input type="checkbox"/> Check users that need to be removed from the account have been set to no access
General	<input type="checkbox"/> Check general content on the applicant website is up-to-date <input type="checkbox"/> Check new features as outlined in SmartyNews are being utilised
Tasks	<input type="checkbox"/> Delete old tasks <input type="checkbox"/> Deactivate old recurring templates <input type="checkbox"/> Reflect on any part of last year's process that could be automated through using recurring templates
Reports	<input type="checkbox"/> Download a local copy of important report templates <input type="checkbox"/> Tidy up and remove templates as required
Funding Overview	<input type="checkbox"/> Download the snapshot report <input type="checkbox"/> Check that any outstanding payments have been made
Contacts	<input type="checkbox"/> Resolve all duplicates <input type="checkbox"/> Consider inserting some sort of prompt in your acquittal forms or report templates asking applicants to get in touch with any changes to contact information
Bulk Action	<input type="checkbox"/> Export summary information or form responses as PDFs as required for use outside SmartyGrants
Forms	<input type="checkbox"/> Update the confirmation of submission email <input type="checkbox"/> Update date validation fields <input type="checkbox"/> Update general content in your forms <input type="checkbox"/> Swap out general content for reference fields where applicable
Stages	<input type="checkbox"/> Archive stages that are no longer in use
Evaluation	<input type="checkbox"/> Gather applicant feedback. What worked well? What did not? <input type="checkbox"/> Set up a feedback process for your programs and consider using SmartyGrants to do it. Make SmartyGrants a one-stop-shop for all your information needs