Help Guide for Applicants

SmartyGrants

Software & data science for revolutionary grantmakers

SmartyGrants provides an easy way for grant seekers to complete their application form online. This guide will explain the essential steps you need to take to complete and submit your form.

Some of the features of SmartyGrants are:

- You can save your progress and return to complete your application at a later time or date;
- Your application is stored online, therefore there is nothing for you to save to your own computer, and;
- You can be certain that a grantmaker has received your application when you submit it.

Download PDF Version

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Step 1 - View and Navigate the application form

View the Form	When you first access SmartyGrants, you will either be taken straight to the **Form Preview**, or you will be presented with the following options.

Community Development Grants 2012

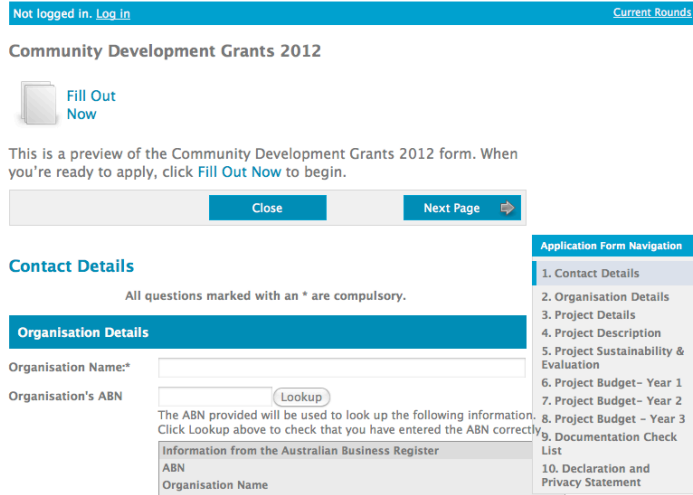Start a submission   Preview the form

Submissions are now being accepted. Submissions close at 5:00PM 7 December 2012 (EST–Summer – Sydney time).

To preview the entire application form, simply click on **Preview the Form**.
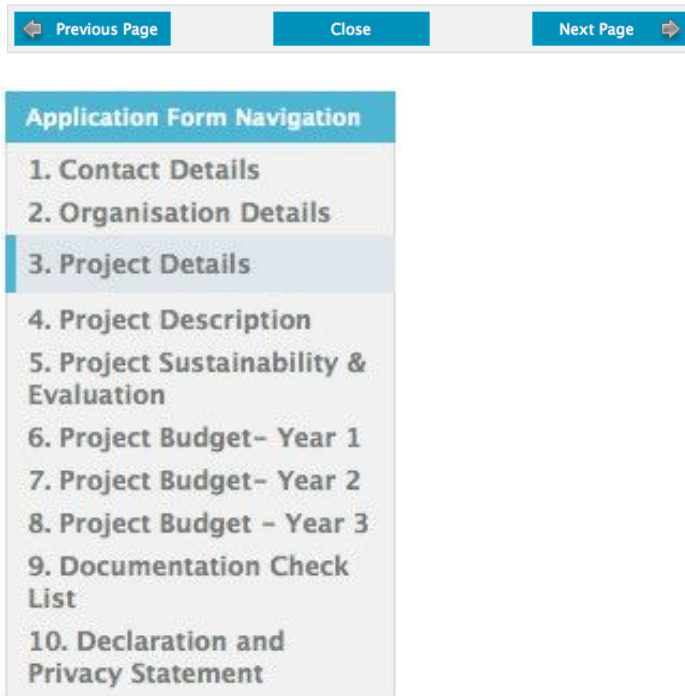
This will show you the form in preview mode.

NOTE: You can't fill out the form while in preview mode. In order to complete the form you need to complete Step 2.

Not logged in. Log in   Current Rounds

Community Development Grants 2012

Fill Out Now

This is a preview of the Community Development Grants 2012 form. When you're ready to apply, click Fill Out Now to begin.

Close	Next Page ➡

Contact Details

All questions marked with an * are compulsory.

Organisation Details
Organisation Name:*
Organisation's ABN   Lookup

The ABN provided will be used to look up the following information. Click Lookup above to check that you have entered the ABN correctly.

Information from the Australian Business Register
ABN
Organisation Name

Application Form Navigation
1. Contact Details
2. Organisation Details
3. Project Details
4. Project Description
5. Project Sustainability & Evaluation
6. Project Budget– Year 1
7. Project Budget– Year 2
8. Project Budget – Year 3
9. Documentation Check List
10. Declaration and Privacy Statement

Navigate	You can navigate through the application form either by clicking on buttons above the form to move between individual pages, or by using the navigation bar on the right to jump to specific pages or sections within a page.

⬅ Previous Page	Close	Next Page ➡

Application Form Navigation

1. Contact Details

2. Organisation Details

3. Project Details

4. Project Description

5. Project Sustainability & Evaluation

6. Project Budget– Year 1

7. Project Budget– Year 2

8. Project Budget – Year 3

9. Documentation Check List

10. Declaration and Privacy Statement

Step 2 - Apply and register

Apply	When you are ready to start your application, simply click on the **Fill Out Now** button
Login and Register	**Login or Register** You must register before you can make an online submission. Registration gives you secure access to your forms allowing you to work on them over time rather than having to complete them all at once. It only takes a moment to register and you can get started on your submission straight after registering. Fields marked with ✱ must be completed. **Login** If you're already registered or have started an online form log in here. **Email Address:** ✱ **Password:** ✱ Forgotten your password? By clicking **Log In** you agree to SmartyGrants' terms of use and privacy statement. [Log In] **Register** If you haven't registered or started filling in a form, register here. **Your Name:** ✱ **Organisation:** **Email Address:** ✱ **Password:** ✱ Passwords must be longer than 8 characters in length and must meet 2 of the following requirements: • include letters • include non–alphabetical characters • include numbers Click **Continue** to confirm your registration. [Continue] In order to enable you to fill out the form you must first have an account with SmartyGrants. Your account details are used solely for the purpose of enabling you to complete your application form and in case the grantmaker needs to contact you. Once you have registered an account, you will use the same username and password for any additional applications you may create in the future by any grant maker using SmartyGrants. **Handy Tip!** A handy tip is to take note of the web link (URL) / pathway you are using for your application. Each grantmaker has a unique link for their site. You might even like to "Bookmark" the link or add the link as a "Favourite" within your internet browser. This can be particularly helpful if you intend creating multiple applications by multiple grantmakers. **For New Accounts**

If you do not have an account you will need to provide your details here and create a password.
Passwords must be longer than 8 characters in length and must meet 2 of the following requirements:

- include letters
- include non-alphabetical characters
- include numbers

You will then need to confirm your password and click **Confirm Registration.**

You will then be able to select the grant program you wish to apply for. Click on **Start a New Submission** for the one you want.

Thankyou, your registration is complete.

We have registered you as:

Name: Olivia Newton
Organisation: Grease Foundation
Email: olivia@newton.org

Please use these details to log in when you start a new submission.

Community Development Grants 2012

Start a New Submission

For Existing Accounts

Login

If you're already registered or have started an online form log in here.

Email Address:
*

Password: *

Forgotten your password?

By clicking **Log In** you agree to SmartyGrants' terms of use and privacy statement.

Log In

Simply fill in your login details and you will be shown any applications you have in progress, as well as offered the option to start a new submission.

Have you forgotten your password? Click on the 'forgotten your password?' link. This will ask you to insert what your username (e-mail address) is, this will then send you an e-mail with a reset password url link. Click on the link and you will be prompted to set a new password.

Step 3 - Fill out the application form

| Save Progress	It is highly recommended that you click **Save Progress** every 10 to 15 minutes when you are filling out a form.
	Previous Page Save Progress Save and Close Next Page
	For security reasons you will be logged out of your application if **30 minutes** has elapsed and you have not saved your progress or navigated between pages. When you are logged out of the system you will lose any changes you have made to that page that have not been saved. To avoid this happening, simply click **Save Progress** periodically if you are spending a long time working on one page of the form.

Elements of the page	The following elements can be found on the application form.

Page Buttons
Using these buttons allows you to navigate between the different pages of a form. You can also Save your progress, or Save and Close your form, in order to return to it at a later time or date.

| ◄ Previous Page | Save Progress | Save and Close | Next Page ➡ |
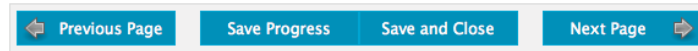
Navigation Bar
You can quickly jump to various pages in the application form using the navigation bar.

Application Form Navigation

1. Contact Details

2. Organisation Details

3. Project Details

4. Project Description

5. Project Sustainability & Evaluation

6. Project Budget– Year 1

7. Project Budget– Year 2

8. Project Budget – Year 3

9. Documentation Check List

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Review

Form Questions
Here you can provide your responses to the form questions.

Project Details

Project Title:*

Project start date:*

Project end date:*

Amount requested:* $

Current Rounds Page
At anytime you can return to the grant round homepage by clicking on the **'Current Rounds'** link on the top right hand side of the page.

My Submissions Log Out   Current Rounds |
| Fill in the form | You can now complete the application form by providing the required responses.

Organisation Details

Organisation Name:*   Grease Foundation

Organisation's ABN   123456789   (Lookup)
The ABN provided will be used to look up the followi
Click Lookup above to check that you have entered t

Information from the Australian Business Register
ABN
Organisation Name |

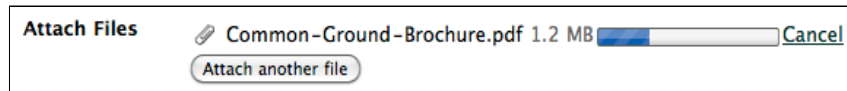|	
Attaching files	If you are attaching files, you need to allow for sufficient times for the file to be uploaded to the page. You should not navigate to another page until the file has been successfully attached, otherwise the file upload will be cancelled.
	Please Note: There is a maximum file limit of 25 megabytes. However, it is strongly recommended you try to keep files under 5 megabytes.
	To attach a file simply follow these steps:
	• Simply select **Attach a file** choose the file you wish to upload and click **Select**.
	• The file will begin to upload and the progress bar will be filled in as the file is upload
	• When the file upload is completed, the progress bar will disappear and a link to the uploaded file will be available, along with the option to remove the file.
Navigate between pages	To navigate between pages you can either use the **Navigation Bar** or the **Next Page** and **Previous Page** buttons at the top and bottom of your current page.
	Clicking on any these will take you to the appropriate page.
	NOTE: Your application form is saved every time you navigate between pages.
Save and Close	If at any stage you wish to save your application and close it you can do so by clicking **Save and Close**.
	You can return to your application at any time prior to the close date of the grant round and continue your application, simply by logging back into your account per **Step 2.**
	Once you log back in you can click on **"My Submissions"** - here you will find a listing of all applications you have begun to fill in and all that are completed.
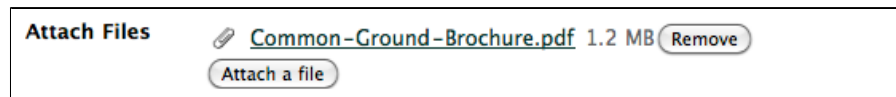
Step 4 - Review and Submit

Review and Submit	When you have completed the last page of the application form you can click **Review** in the navigation panel.

This will display your application in the way it will appear to the organisation you are submitting it to.

This is also a good time to **Save** or **Print** a copy of your application for your own records. Though you can log back into SmartyGrants at any time and view your completed application after having submitted it. To print a copy of your form before submitting it, click on the **"Download PDF"**.

> **Important!**
> **You will not be able to make any changes to your form after you have submitted it.**

If you are satisfied with your application click **Submit.**

Problems with your form	If there are any problems with your application, it will not be submitted and any issues will be highlighted (as illustrated below). You will have the opportunity to correct the problem by clicking **Go to Question**.

Once you have made corrections, you can return to the **Review and Submit** page and click **Submit Application** again.

Step 5 - Confirmation

Confirmation of Submission	**Confirmation screen** When the application is submitted you receive a confirmation message that the application has been received. If you see this message you can be sure that the grantmaker has received your application. You will also see your application number, which you can use should you need to contact the grantmaker about your application. **Confirmation email and PDF attachment** You will also receive a confirmation email when your application is successfully submitted. Attached to the email will be a PDF copy of the form you just submitted.

Optional - Submitting multiple applications

Start another application	Depending on the grantmaker, you may be able to submit multiple applications in the same grant round. To start another application you must return to the grant program page. You can return to the round by click on the current rounds link near the top right corner of the form You will then be able to start a new application by clicking **Start New Submission**.

Multiple Applications	To view all of your applications for a grant program and to switch between them you first need to be logged into your account and then click on **My Submissions**.
	My Submissions Current Rounds
	You can then choose which application you wish to continue, by clicking on the appropriate link.
	Your Submissions

Forms In Progress

CD2012005 – Continue Community Development Grants 2012
Community Development Grants 2012
In progress, last updated on 3 December 2012

Start New Submission for Community Development Grants 2012

Submitted Forms

CD2012003
Community Development Grants 2012
Submitted on 3 December 2012

CD2012004
Community Development Grants 2012
Submitted on 3 December 2012 |

Optional - Viewing / Saving / Printing applications

Download PDF of your application	If you wish to save a copy of your application on your computer, you can download a PDF of your form.
	Start by clicking on the **Review** link at the bottom of the navigation box.
	Application Form Navigation

1. Contact Details
2. Organisation Details
3. Project Details
4. Project Description
5. Project Sustainability & Evaluation
6. Project Budget– Year 1
7. Project Budget– Year 2
8. Project Budget – Year 3
9. Documentation Check List
10. Declaration and Privacy Statement

Review |
| | Then click the **Download PDF** button at the top of the page, your application will then download as a PDF file. |
| | Previous Page   Download PDF   Save and Close   Submit |

View submitted application	You must first be **Logged In** to your account in order to view your submitted applications. Once you are logged in, you will see the **My Submissions** link near the top left of the screen, click on this link. *Note that any submissions you create and/or submit can always be found in the **My Submissions** area (this includes finding any additional forms your Grantmaker may ask you to complete).

This will display all of your applications, both in progress and submitted.

To view your application, simply click on the relevant link under **Submitted Forms.**

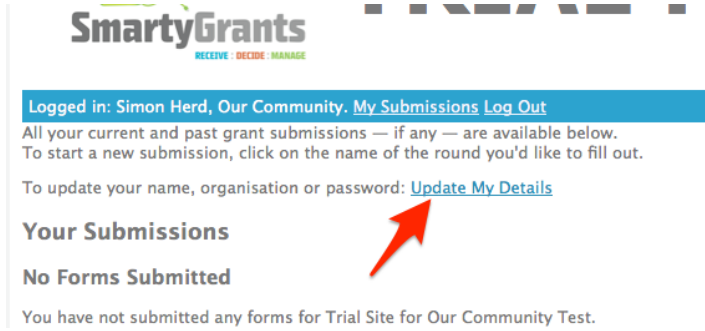|	
Print your application	Once you are viewing the relevant application you simply select the **Download PDF** link at the top of the page.
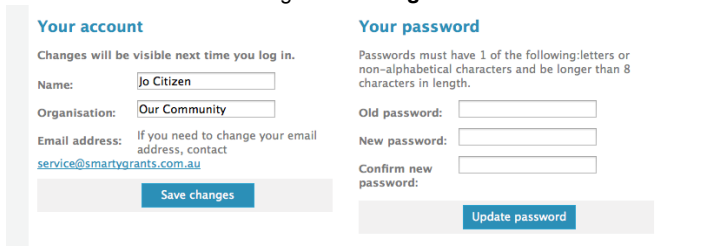
This will open a PDF copy of your application in either Adobe Acrobat or Adobe Reader. From there you can click on **"File"** and "**Print**" options within these applications.

Optional - Accessing Additional Forms

Additional Forms	It may be possible that at some stage the Grantmaker you have applied through or received funding from will ask that you complete an additional form, for example, a report form or an acquittal form. The Grantmaker will provide you with a link OR you can simply log into the Grantmakers grant page where you have originally applied for funding. You must first be **Logged In** to your account. Once you are logged in, you will see the **My Submissions** link near the top left of the screen, click on this link. *Note that any submissions you create and/or submit can always be found in the **My Submissions** area . Any additional forms that the Grantmaker has provided you to complete are also found in the My Submissions area, **click on the relevant form to complete.**

Optional - Update your account details or password

My Submissions	To change your account details goto the **My Submissions** page and click on **Update My Details**
Update account details	You can change the **Name** and **Organisation** details associated with your account by entering them in the relevant boxes and clicking **Save Changes**
Change your password	To change your password you will need to first enter your old password and then enter your new password twice. **Please note the password must be at least 8 characters long.**
Change your email address	To change the email address associated with your account you will need to email service@smartygrants.com.au

FAQ's

- Q: I have forgotten my password, how do I reset my password?
- Q: Change my account details or password
- Q: I tried to use the reset password and....
- Q: How often should I save my application form? Is there a timeout limit?
- Q: Unable to submit?
- Q: The round has closed, and I can't submit my applications for reason xxxxxx?
- Q: When I log in I do not see my application.
- Q: The date I am trying to enter is not being accepted?
- Q: When registering for an account I don't have a organisation name?

Q: I have forgotten my password, how do I reset my password?

- On the applicant login screen click on the 'Forgotten your password?' link

Login

If you're already registered or have started an online form log in here.

Email Address:
*

Password: *

Forgotten your password?

Log In

- enter the **e-mail address username** you registered with and click on the reset button

Forgotten Password

If you already have a SmartyGrants account but can't remember the password, you can reset it.

Email Address:

Reset Password

Forgotten Password

Thank you, an email has been sent to the address provided. Please check your email for further instructions.

If you do not receive an email or require further assistance, please contact SmartyGrants.

- an e-mail will be sent to the registered e-mail address. **Follow the instructions** and **click on the link provided**. This will take you to a page where you can enter your new password.

Password Reset

Hi Cathy Freeman,

We received a request to reset your password for Our Community - Training Account.

To reset your password, click the link below and it will take you to a web page where you can create a new password.

http://ourcommunity-training.smartygrants.com.au/resetpassword/16977/641474b013c325bf20b2b05d95bf251ed76e2e

Please note that the link will expire twenty-four hours after this email was sent.

Thankyou

The team at SmartyGrants

- **Enter your new password** and **confirm the new password** and click on the **Reset Password button**

. You can now login in using your new password.

Reset Password

Passwords must have 1 of the following:letters or non–alphabetical characters and be longer than 8 characters in length.

New Password:

New Password, again:

Reset Password

Q: Change my account details or password

You can change the name, organisation and password for your account by going to **My Submissions** and clicking on **Update My Details**.

To change the email address associated with your account please email service@smartygrants.com.auFor more detailed instructions refer to the following help Update your account details or password

Q: I tried to use the reset password and....

Option 1 - I did not get the email

Step 1: If you did not get the email check your spam and junk mail – although it could also be that your organisation spam filter is blocking the email.

Step 2: Please CHECK THAT YOU ENTERED YOUR EMAIL CORRECTLY. Typos are quite common for applicants either when filling out the forgotten password or when registering their email address as the username.
Step 3: Make sure you are using a registered email address. It is quite common for users to try and access the system using an unregistered email address - you can check this at your end by looking at the application online via the manage site.

Option 2: I reset my password but I was asked to update my details
The user has taken the extra unrequired step after changing their log in details of clicking into the update details link. This asks then to change the account password and provide the old password. This step is unnecessary. Simply click out of this area into the my submissions area.

Q: How often should I save my application form? Is there a timeout limit?

It is highly recommended that you click **Save Progress** every 10 to 15 minutes when you are filling out a form.

For security reasons you will be logged out of your application if 30 minutes has elapsed and you have not saved your progress or navigated between pages. When you are logged out of the system you will lose any changes you have made to that page that have not been saved. To avoid this happening, simply click **Save Progress** periodically if you are spending a long time working on one page of the form.

Q: Unable to submit?

Applicants and Staff can reference Help Guide for Applicants. This walks applicants through submitting. The most common reasons an applicant won't be able to submit their applications include:

- not filled in a mandatory/required field, this can include file upload question and budget grid
- have used alpha characters in a number question field,
- has gone over the word limit on a question,

All of these errors are highlighted in red on the review page which sits at the very end of the application. Sometimes the applicant has filled in the whole form but has not gone to the review page so does not see the submit button. The submit button sits on the review page.

Q: The round has closed, and I can't submit my applications for reason xxxxxx?

Unfortunately we cannot help as the Grantmaker (Funder) are the only ones that can grant an extension of time for you. The funders contact details are generally found on the first page of your application or on their website. If the grantmaker does not provide contact details you can do a google search for the funding organisation and use the organisation general contacts.

Q: When I log in I do not see my application.

You will find any submissions on the grantmakers applicant site under the **'my submissions'** link at the top of the screen. If your submission is not there, the most likely answers for this are:

Answer 1: Most likely you have created two accounts both with an application and are looking in the wrong account for the wrong application. Is there possibly an alternate email address you may also have registered. Do you know the correct application ID?

Answer 2: It is also possible that you had left it too long between saves when working on the application and the last save was not successful. Typically you have at least 60 minutes to save your work, however, your browser can also time you out after typically 15-20 minutes. Sometimes also your internet connection may be disrupted for some reason which will also disrupt the form access.

Unfortunately there is nothing we can do to retrieve your work, we can only recommend you click 'Save Progress' approximately every 10 minutes to ensure you do not lose data. Saved data is saved, unsaved data is always vulnerable.

Q: The date I am trying to enter is not being accepted?

The date must be in the format of dd/mm/yyyy, you either use the date picker to choose a date or manually type it in, but it must be in the format dd/mm/yyyy.

3.7 Expected project start date

Please tell us when you expect to begin the projec[t]

*

Must in the format dd/mm/[yyyy]   13

A response to thi[s]

		JANUARY 2013				
«	‹	TODAY			›	»
mon	tue	wed	thu	fri	sat	sun
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	January 09, 2013		19	20
21	22	23	24	25	26	27
28	29	30	31			

3.8 Expected project end date

Please tell us when you expect the project to be c[ompleted]

* 01/01/2013

Must in the format dd/mm/yyyy

* Required Field

Q: When registering for an account I don't have a organisation name?

Don't worry, you can just put in N/A or your own name. This filed is mandatory so you need to have some content in there, however it doesn't really matter what it is.