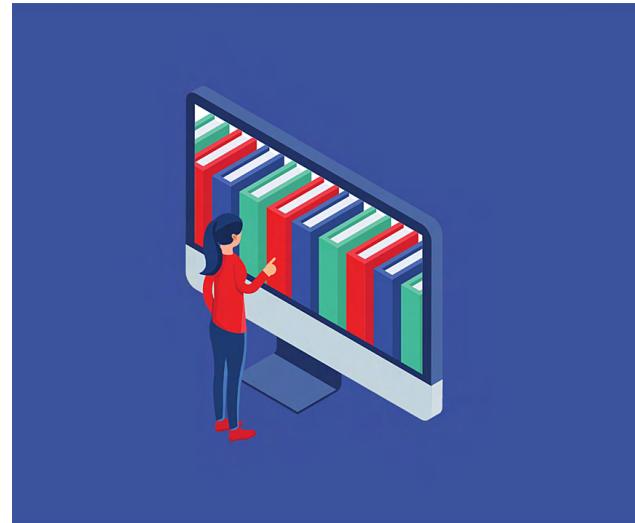


# SmartyFile: A How-To Guide



SmartyFile is a central repository that enables organisations to create, manage, and contribute to grant applications through a dedicated account.



## In this guide

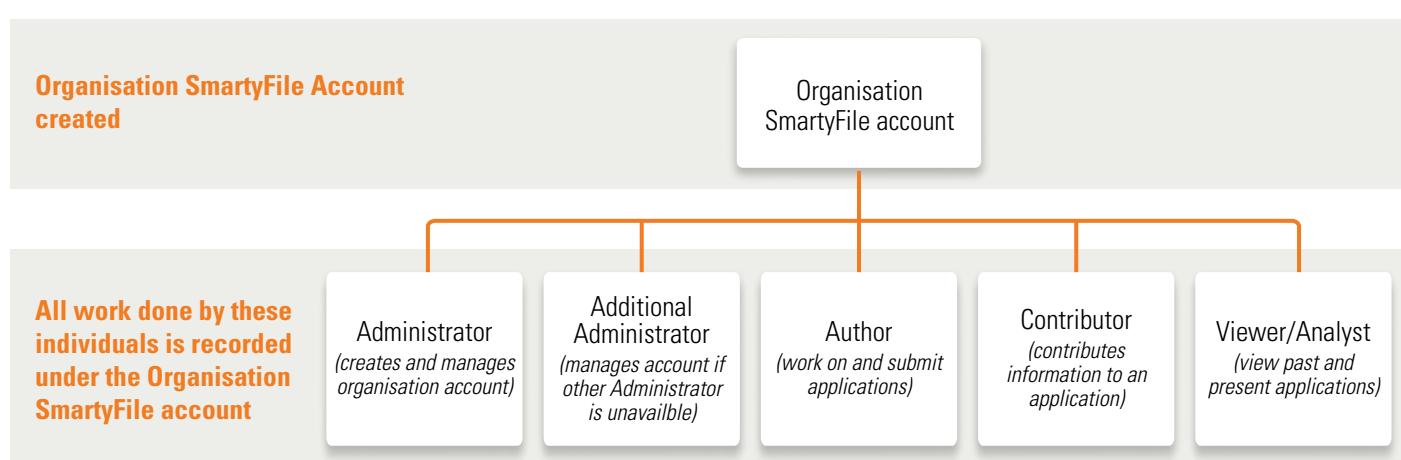
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## What is SmartyFile?

SmartyFile is a central repository that allows you to record and store all grant application information in one place.

Much like having an individual Smarty Grants account, SmartyFile allows you to create an Organisation account.

This SmartyFile organisation account allows you to make, create and contribute to grant applications on behalf of an organisation.



## Why should I use SmartyFile?

Having a profile gives organisations the ability to:

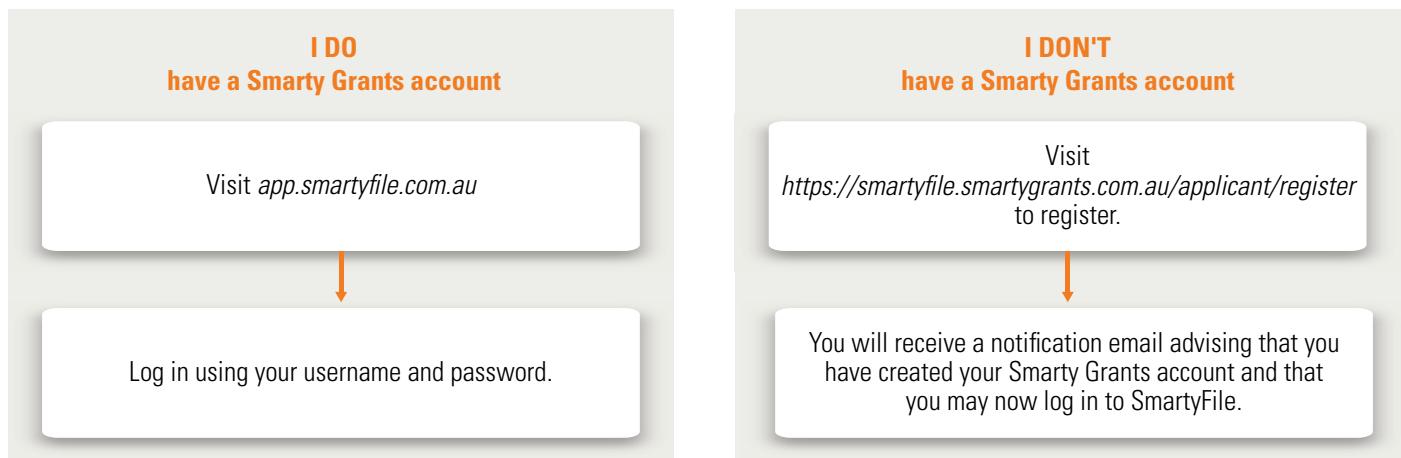
- ✓ See all of their applications across multiple Smarty Grants funders in one spot
- ✓ Pre-fill information into forms
- ✓ Securely collaborate and share forms

SmartyFile also helps to overcome common problems that grant applicants encounter.

Problem	SmartyFile solution
Our grants writer originally completed applications. They are now unavailable, and we need to access our past and current grants.	This situation can be avoided by having an organisation SmartyFile account where multiple members are set up with access to the grant submissions (see <b>Administrators, user roles and access levels</b> on <b>page 6</b> ).
The grant we are applying for requires a lot of different documentation from across our organisation (e.g. financials, certificates of currency)	Use the 'Files' function (see <b>Files</b> on <b>page 8</b> ) to store your documents in one location so that all organisation members can access them at any time.
I would like to find out which grants have been applied for in the past	Join the organisation's SmartyFile account (see <b>I want to join an organisation that already exists in SmartyFile</b> on <b>page 5</b> ). You will be able to view the grants history of the organisation.
There are multiple members of our organisation applying for grants and it is hard to keep track of everything. We would prefer that only certain members of the organisation have permission to submit an application we are working on.	The 'Administrator' (see <b>Administrators, user roles and access levels</b> on <b>page 6</b> ) can ensure that all members of the organisation applying for grants are added to the organisation account (see <b>I want to set up my organisation in SmartyFile</b> on <b>page 3</b> ). All applications will then be viewable and accessible in one central place. The permissions of these users can be assigned by an 'Administrator'.
I plan to retire soon, and I'd like a new member to take over my role.	Add or promote the new member to an 'Administrator' role (see <b>Administrators, user roles and access levels</b> on <b>page 6</b> ) so they have access to see and manage all current and past grants. They can remove your profile from the organisation once you leave.
A funder has informed us that we have an overdue acquittal report. The member of the organisation who originally submitted the application is no longer with our organisation and we can't access the acquittal report to complete it.	This situation can be avoided by having an organisation SmartyFile account where multiple members are set up with access to the grant submissions (see <b>Administrators, user roles and access levels</b> on <b>page 6</b> ). This ensures that current members can access the submissions of previous members.

## Log in to SmartyFile

You will need a Smarty Grants account to log into SmartyFile.



With your Smarty Grants account, you can now **JOIN** or **CREATE** your organisation's SmartyFile profile.

To **CREATE** a SmartyFile profile for your organisation see *I want to set up my organisation in SmartyFile on page 3*.

To see if your organisation already has a SmartyFile profile and to **JOIN** their profile see *I want to join an organisation that already exists in SmartyFile on page 5*.

## I want to set up my organisation in SmartyFile

Click 'My Organisations'. Click on 'New Organisation' to create a profile.

The screenshot shows the SmartyFile interface. At the top, there is a logo with three vertical bars (red, blue, green) and the text 'SmartyFile' with the tagline 'Store it; Share it; Use it'. Below the logo, there is a navigation bar with three tabs: 'My Profile' (blue), 'My Organisations' (orange border), and 'My Submissions' (blue). To the right of the tabs, it says 'Logged in as [redacted]' and has a 'Logout' button. Below the navigation bar, there are four columns with headers: 'Organisation Name', 'Role', 'Submission Access', and 'Can Submit'. A message below these columns says 'You aren't part of any organisations yet.' and 'If you would like to share and collaborate with your team members or colleagues, you can create an organisation below.' At the bottom of the page, there is a blue button with the text 'New Organisation'.

Enter the **ABN** of the organisation you wish to create and click on '**Lookup**'.

### Create Organisation

Please enter the business registration number(ABN/NZBN) of the organisation you wish to register

87 445 926 832

Enter the **name** of your organisation.

## Create Organisation

Please enter the business registration number(ABN/NZBN) of the organisation you wish to register

87 445 926 832



[Lookup](#)

### ABN Details

Registered name	ABN status	Registered for GST
JACANA CRICKET CLUB	Active	No
DGR endorsed	Charity type	ACNC registration
No	-	-
Location	Tax concessions	-
VIC, 3047	-	-

Please enter a name for your organisation:

[Create](#)



Complete the **organisation details**.

### Contact Details

#### Address

Lorraine Cres, Broadmeadows, VIC, 3047, Australia Primary

#### Email

cricketsecretary@example.com Primary

#### Phone

03 1234 5678 Primary

#### Website

www.jacanacc.example.com Primary

### Bank Accounts

Main Account: jacana CC Main 123 456 / 987 654 3

**NOTE:** It is good governance for a community group to have a **single, central email address** (and related password) that more than one committee member can access.

#### Why?

- ✓ **Share the load** – more than one member can respond to emails.
- ✓ **Transparency** – if all correspondence is handled within one inbox there is less risk of things to be overlooked.
- ✓ **Succession planning** – when a key member leaves the organisation, the next person can take over the email address.

By setting up the organisation in SmartyFile, **you are automatically the Administrator of the organisation**. As Administrator, you will have authority to:

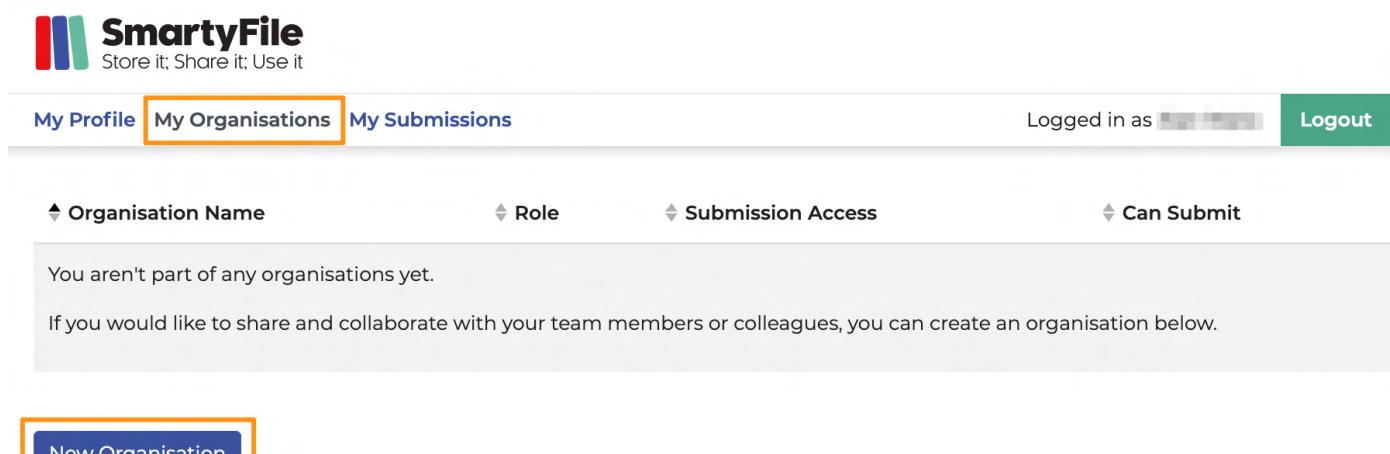
- ✓ Manage the organisation's profile
- ✓ Add additional users and administrators
- ✓ Manage their permission levels

It is highly recommended that you assign an additional Administrator as a back up – in case you leave the organisation.

Learn more at **Administrators, user roles and access levels** on **page 6**.

## I want to join an organisation that already exists in SmartyFile

Click 'My Organisations'. Click on 'New Organisation'.



My Profile **My Organisations** My Submissions

Logged in as [REDACTED] Logout

◆ Organisation Name ◆ Role ◆ Submission Access ◆ Can Submit

You aren't part of any organisations yet.

If you would like to share and collaborate with your team members or colleagues, you can create an organisation below.

New Organisation

Enter the **ABN** of the organisation you wish to join and click on '**Lookup**'.

### Create Organisation

Please enter the business registration number(ABN/NZBN) of the organisation you wish to register

87 445 926 832

Select the organisation you wish to join.

#### ABN Details

Registered name  
Western Downs Regional Council

ABN status  
Active

Registered for GST  
Yes

DGR endorsed  
No

Charity type  
-

ACNC registration  
-

Location  
QLD, 4405

Tax concessions  
-

This ABN is already registered with SmartyFile.

You can request to join an existing organisation (listed below) or you can create another organisation using the same ABN (note: if you create a new organisation you will not be able to share information with any other organisations).

#### Option 1: Join an existing organisation

You can request to join an existing organisation.

Western Downs Regional Council - SF01-4216(Already a member)

A notification will be sent to the Administrator(s) requesting to join.

The Administrator will assign you a role.

Learn more at **Administrators, user roles and access levels** on **page 6**.

## Administrators, user roles and access levels

There are five different **user roles** that can be assigned to users:

- Administrator
- Author
- Contributor
- Viewer/Analyst
- Custom

The functions available to each role are outlined below.

Permissions	Administrator	Author	Contributor	Viewer / Analyst	Custom <small> ⓘ</small>
Manage Organisation <small> ⓘ</small>	✓	-	-	-	<input checked="" type="checkbox"/>
View Organisation Profile <small> ⓘ</small>	✓	✓	-	-	<input checked="" type="checkbox"/>
Create / Start Items	✓	✓	-	-	<input checked="" type="checkbox"/>
Edit Items <small> ⓘ</small>	✓	✓	✓	-	<input checked="" type="checkbox"/>
View Items <small> ⓘ</small>	✓	✓	✓	✓	<input checked="" type="checkbox"/>
Submit Items <small> ⓘ</small>	✓	✓	-	-	<input checked="" type="checkbox"/>

[Save](#)

[Cancel](#)

As an **Administrator** you can:

- ✓ Add new users
- ✓ Manage the permissions and access levels of current users
- ✓ Remove users

Administrators can create custom user roles by using the custom column. Buttons will appear green if a permission is active.

## My profile

Each user who has a SmartyFile account also has a personal '**My Profile**' section where they can keep their contact details up to date. This information can then be auto-filled into forms from funders who utilise Smarty Grants.

Select the pencil icon to edit or add contact information under the '**My Profile**' tab.

My Profile [My Organisations](#) [My Submissions](#) Logged in as Daisy [Logout](#)

[Details](#) [Files](#)

### Personal Details

First name	Last name
Daisy	
Username	Email
daisy@example.com	daisy@example.com <span>Primary</span>
Address	Other
552 Victoria St, North Melbourne, Victoria, 3051, Australia	
<span>Primary</span>	
Phone	Website
03 9320 6888 <span>Primary</span>	www.smartygrants.com.au <span>Primary</span>
0411222000 <span>Other</span>	

# My submissions

[My Profile](#) [My Organisations](#) [My Submissions](#)

Logged in as Eddie Example

[Logout](#)

## My Submissions

[Current](#)

[Archived](#)

Sort by

Due Date



Search keywords

[Advanced search](#)

CD00042



Farmville Council

Small Grants 2023

In progress



No due date



MHA2200002 - Bike race for mental health

Regional NSW

NSW GOVERNMENT

Mental Health Awareness 2022

Eddie Pty Ltd

Owned by Eddie Example

Submitted



Submitted 5:37pm, 17 May 2023 (AEST)



On the left-hand side of each submission, you will see a logo corresponding to the relevant grant funder.

From here you can:

- ✓ Search
- ✓ Sort
- ✓ Archive (*please see note below*)
- ✓ Delete drafts
- ✓ Assign submissions to an organisation
- ✓ Access forms you have been asked to complete as part of a submission.

To access forms, click on either the submission ID number, or the blue down arrow on the right hand side of a submission.

**NOTE: We strongly recommend waiting until after you have submitted an acquittal report to archive a submission. If a submission is archived, you will be unable to submit forms related to that submission.**

## Files

Applicants with a SmartyFile profile have the ability to upload and store files in either their:

- Individual profile ('My Profile')

OR

- Organisation profile

These centrally stored files can then easily be accessed by applicants completing any Smarty Grants forms. As seen below, the applicant can select 'Select Stored file' to input a document from 'Files':

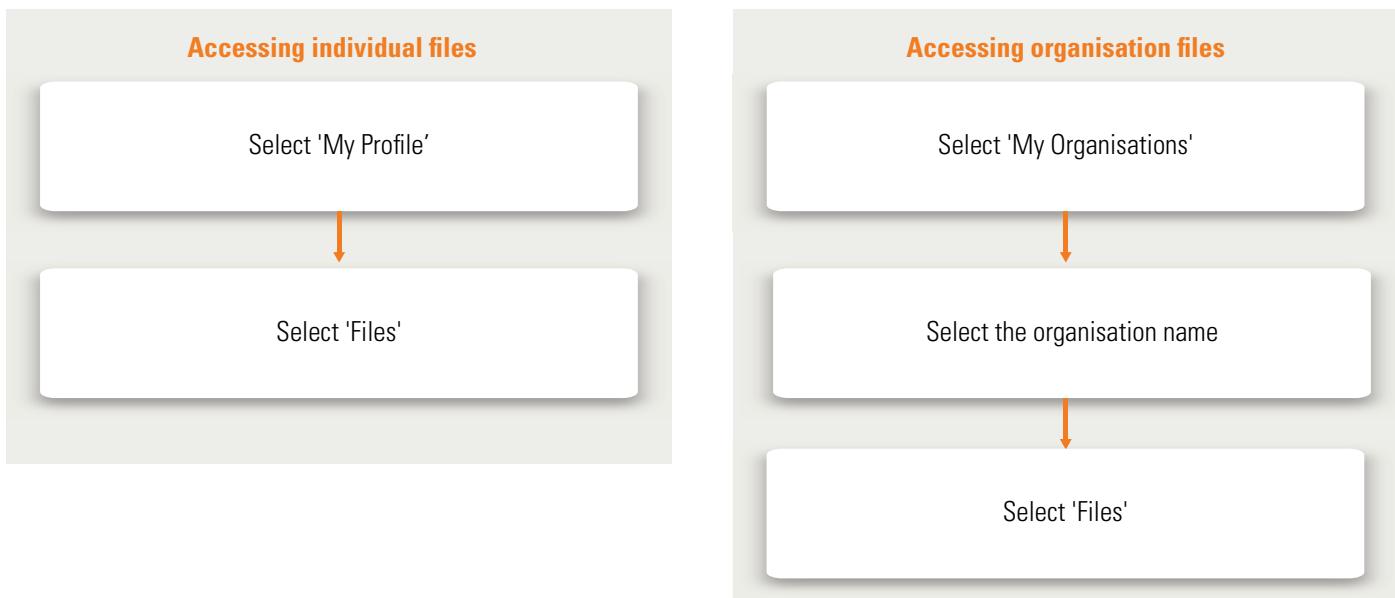
### Supporting Documents

#### Upload current insurance documents

Attach a file:

[Upload new file](#)

[Select stored file](#)



Examples of documents that could be stored so that they are ready for when you are completing an application include:

- ✓ Certificate of Incorporation
- ✓ Financial documentation
- ✓ Certificate of Currency

<b>Maximum File Size (for an individual file)</b>	<b>Maximum Storage available</b>
25MB	Each individual and organisation has 2GB storage

If this storage limit is reached, users will be able to delete any files that are no longer required.

## Prefilling information

You can pre-fill information from your organisation profile when completing a submission through any funder using Smarty Grants.

You can still manually update any field that has been pre-filled if you need to.

**Applicant**

**Applicant Name**

<b>Title</b>	<b>First name</b>	<b>Last name</b>
<input type="button" value="▼"/>	<input type="text"/>	<input type="text"/>

**Applicant Primary Address**

 [Prefill from SmartyFile...](#)

Start typing to search by name or address

David Bradley **Primary** 552 Victoria St, North Melbourne, Victoria, 3051, Australia

**Applicant Office Address**

## Multi-factor authentication

As an extra layer of security, you may require all users who belong to your organisation/s to use multi-factor authentication. To enable multi-factor authentication:

Click on the **'Security'** tab of your organisation (if you cannot see this tab, you don't have the permissions required to view it. Contact your organisation Administrator).



### Multi-Factor Authentication (MFA)

As an extra layer of security, you may require all users in this Organisation to use an authenticator mobile app (such as Google Authenticator or Authy) each time they log in.

#### **Enable Multi-Factor Authentication**

Click **'Enable Multi-Factor Authentication'** (it will be purple when enabled).

## Multi-Factor Authentication Setup

For improved security, you need to set up an authenticator app to log in to your account.

**Step 1** Install an authenticator app on your phone or tablet.

For example Google Authenticator, Authy, or similar, available from the App Store or Google Play.

**Step 2** Add SmartyFile to the authenticator app by scanning the below QR code:



[Can't scan this QR code?](#)

**Step 3** Enter the 6-digit code from the app and click **Activate**.

Click **'Activate'**.

Once initial activation is complete, users will be presented with the following screen upon every login:

## Multi-Factor Authentication

Please provide the one-time passcode generated by your authenticator application on your device.

**6 digit passcode**

[Can't access your one-time passcode?](#)

## FAQs & support

### ***My access level has been updated in SmartyFile however there is no difference in what I can view or access.***

Try logging out of SmartyFile and then logging back in. If you still cannot see the information that reflects your access level, please contact your organisation Administrator.

### ***What is my SmartyFile password?***

Your SmartyFile password is the same as your normal Smarty Grants password.

### ***How do I find out who my SmartyFile Administrators are?***

If you have already been added to a SmartyFile organisation, but you are not sure who your SmartyFile Administrators are:

1. Go to: **SmartyFile - Home** (<https://www.smartyfile.com.au/>).
2. Log in using your usual Smarty Grants account username and password.
3. Click '**My Organisations**' at the top of the page.
4. Click an organisation.
5. Click '**Users**' at the top of the page.

### ***If you discover someone on your SmartyFile account who is not known to your organisation, is there a way to delete them?***

If there is an unknown user attached to your organisation talk to your Administrator. Only Administrators can delete users.

### ***Do I have to pay to use SmartyFile?***

No. This is a free service.

### ***My organisation does not have an Australian Business Number (ABN). Can I still set up my organisation in SmartyFile?***

No. Organisations or individuals without an ABN are currently not able to create a SmartyFile organisation profile. A condition of application for many funders includes having a current ABN.

### ***Does Smarty Grants vet users who attempt to register an organisation in the system?***

There is no approval or multiple-step process required to create a SmartyFile organisation profile. There is no authority that can verify whether someone 'belongs' to an organisation or has authority to create an organisation profile. If there is an issue that arises where an Applicant believes an organisation profile has been improperly acquired they should contact the **SmartyFile Support Team** ([service@smartyfile.com.au](mailto:service@smartyfile.com.au)).

### ***What happens if the SmartyFile account Administrator leaves the organisation?***

It is best if each organisation can have multiple Administrators. If an Administrator leaves the organisation, another Administrator can remove them from the SmartyFile organisation account.

If all Administrators have left and are not able to be contacted to promote new Administrators, you will need to contact the **SmartyFile Support Team** ([service@smartyfile.com.au](mailto:service@smartyfile.com.au)) to formally request changes to the organisation Administrator.

### ***Are Archived applications still visible/accessible to funders?***

Yes. Archiving an application just moves it to a different list in SmartyFile. It has no effect at the funders end.

### ***Need technical support or help with managing your account?***

**Phone:** +61 3 9320 6888

**Please refer to the full Program Guidelines for further information. Need assistance?  
Contact the Grants Team on 1300 COUNCIL (1300 268 624) or [grants@wdrc.qld.gov.au](mailto:grants@wdrc.qld.gov.au)**

