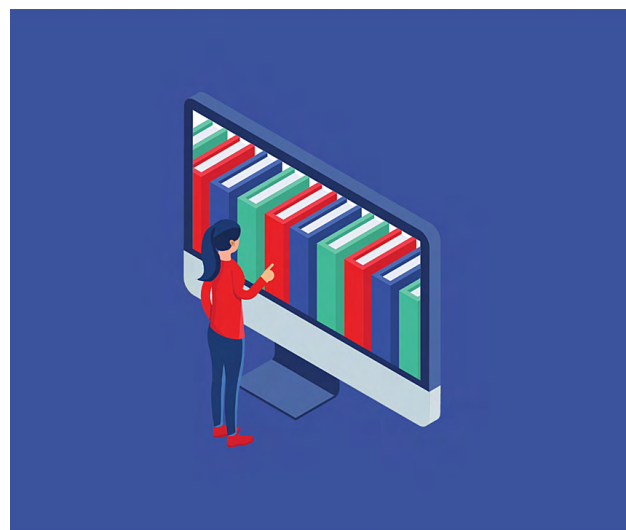


SmartyFile: A How-To Guide

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



In this guide

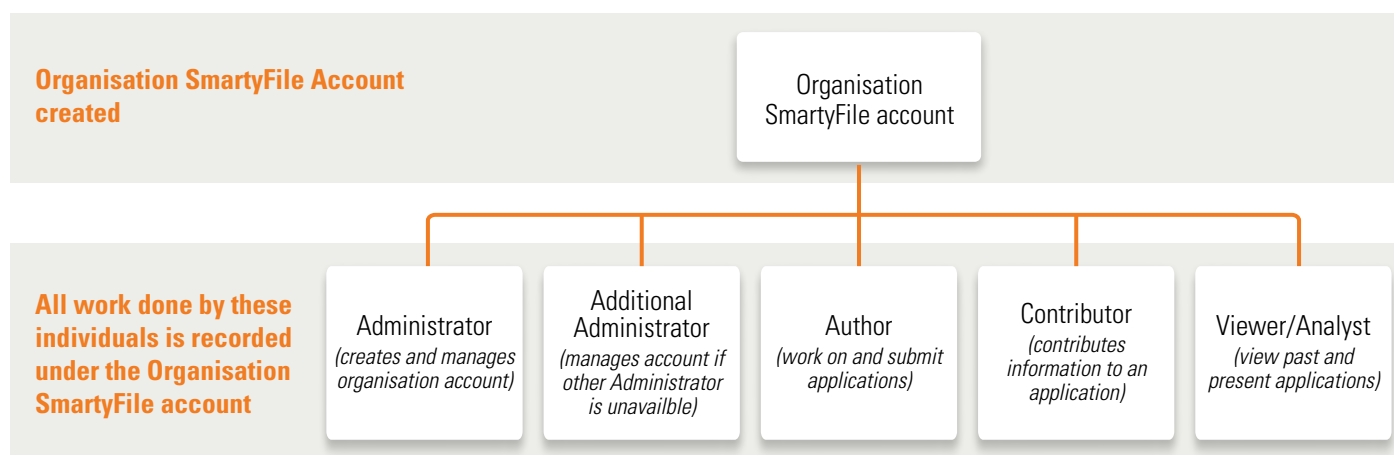
| | | | |
|--|---|-----------------------------|----|
| What is SmartyFile? | 1 | My profile | 6 |
| Why should I use SmartyFile? | 2 | My submissions | 7 |
| Log in to SmartyFile | 3 | Files | 7 |
| I want to set up my organisation in SmartyFile | 3 | Prefilling information | 8 |
| I want to join an organisation that already exists in SmartyFile | 5 | Multi-factor authentication | 9 |
| Administrators, user roles and access levels | 6 | FAQs & support | 10 |

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:

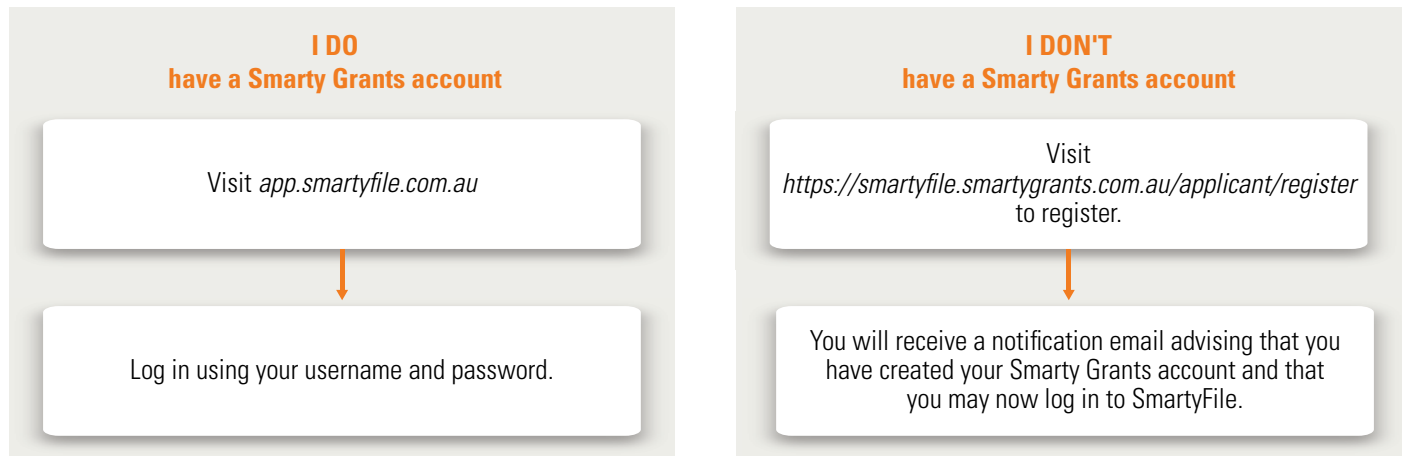
- ✓ See all of their applications across multiple Smarty Grants funders in one spot
- ✓ Pre-fill information into forms
- ✓ Securely collaborate and share forms

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 Administrators, user roles and access levels on page 6). |
| 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 Files on page 8) 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 I want to join an organisation that already exists in SmartyFile on page 5). 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 Administrators, user roles and access levels on page 6) can ensure that all members of the organisation applying for grants are added to the organisation account (see I want to set up my organisation in SmartyFile on page 3). 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 Administrators, user roles and access levels on page 6) 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 Administrators, user roles and access levels on page 6). 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, the SmartyFile logo is displayed with the tagline 'Store it; Share it; Use it'. Below the logo, there are three navigation tabs: 'My Profile', 'My Organisations' (which is highlighted with an orange box), and 'My Submissions'. To the right of these tabs, it says 'Logged in as' followed by a blurred username and a 'Logout' button. Below the navigation bar, there is a table header with four columns: 'Organisation Name', 'Role', 'Submission Access', and 'Can Submit'. Below the header, a message states: '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.' At the bottom of the page, there is a blue button labeled 'New Organisation' which is also highlighted with an orange box.

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:

Important notes: By clicking 'Create', you will be the administrator of this organisation. As administrator, you will have authority to manage the organisational profile, invite additional users and manage their permission levels. For further information on managing your organisation and users, please visit our [Help page](#).

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 [user icon]

[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.

Details

Users

Roles

Security

| Permissions | Administrator | Author | Contributor | Viewer / Analyst | Custom ^① |
|--|---------------|--------|-------------|------------------|---------------------|
| Manage Organisation ^① | | - | - | - | |
| View Organisation Profile ^① | | | - | - | |
| Create / Start Items | | | - | - | |
| Edit Items ^① | | | | - | |
| View Items ^① | | | | | |
| Submit Items ^① | | | - | - | |

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
Daisy

Last name

Username
daisy@example.com

Address
552 Victoria St, North Melbourne, Victoria, 3051, Australia
Primary

Phone
03 9320 6888 **Primary**
0411222000 **Other**

Email
daisy@example.com **Primary**
Other

Website
www.smartygrants.com.au **Primary**

My submissions

My Submissions

Current **Archived**

Sort by

Due Date



Search keywords

[Advanced search](#)

CD00042

In progress



Farmville Council

Owned by **Eddie Example**

No due date

Small Grants 2023

MHA2200002 - Bike race for mental health

Eddie Pty Ltd

Submitted



Regional NSW

Owned by **Eddie Example**

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

Mental Health Awareness 2022

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](#)

Accessing individual files

Select 'My Profile'

Select 'Files'

Accessing organisation files

Select 'My Organisations'

Select the organisation name

Select 'Files'

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

| Maximum File Size (for an individual file) | Maximum Storage available |
|--|--|
| 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

| Title | First name | Last name |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <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).

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) 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**

