

# SmartyGrants, SmartyFile & GrantGuru

Process Guide



## Contents

<b>Section 1 – SmartyGrants</b> .....	<b>3</b>
Introduction .....	3
Latrobe City Council’s Grant Information.....	3
Registering for SmartyGrants.....	3
Accessing Latrobe City Council’s SmartyGrants .....	4
Fill out the Application Form .....	5
Save Progress.....	5
Elements of the Page .....	6
Fill in the Form.....	7
Attaching Files.....	7
Save and Close .....	7
Review, Addressing Issues and Submit .....	8
Confirmation .....	9
Confirmation of Submission.....	9
Start Another Submission .....	10
Viewing / Saving / Printing Applications.....	10
Forms in Progress .....	10
Forms Submitted .....	11
Accessing Additional Application Information .....	11
Accessing Acquittals or Subsequent Forms.....	12
Update your Account Details or Password .....	13
Update Details.....	13
Change Email Address .....	14
Change Owner of Submission.....	14
Update Owner/User of a Submission.....	14
Share a Submission .....	15
Share a Submission .....	15
Delete and Archive Submissions.....	16
Delete.....	16
Archive/Unarchive .....	16
FAQ’s .....	17
<b>Section 2 – SmartyFile</b> .....	<b>18</b>
User Registration and Login.....	18
Create your Organisation Profile .....	18
Pre-Filling Organisation or Profile Information into SmartyGrants Forms.....	21
User Roles .....	22
Add or Edit Users (Organisation Members).....	23

My Profile .....	24
File Storage.....	25
My Submissions .....	28
Assign an Existing Application to one of your Organisations.....	29
Remove a Submission from an Organisation.....	29
Delete a Draft Submission .....	30
Archive a Submission.....	30
To Archive a Submission .....	30
To Unarchive a Submission .....	31
More Information .....	31
<b>Section 3 – GrantGuru .....</b>	<b>32</b>
Registration and Login .....	32
Create a Free Account.....	32
Register and Login .....	32
Personalise your Profile .....	34
Getting Familiar .....	34
Profile Preferences.....	35
Apply for Grants .....	36
Searching for Grants .....	36
Applying for Grants.....	37
More Information .....	38

## Section 1 – SmartyGrants

### Introduction



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.

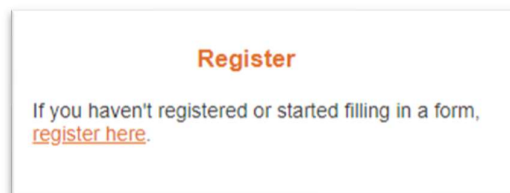
### Latrobe City Council's Grant Information

You can access all of Latrobe City Council's grant information via the Latrobe City Council website - <https://www.latrobe.vic.gov.au/CommunityGrants>

### Registering for SmartyGrants

To apply for funding, you must be registered in SmartyGrants. To register, follow the below steps:

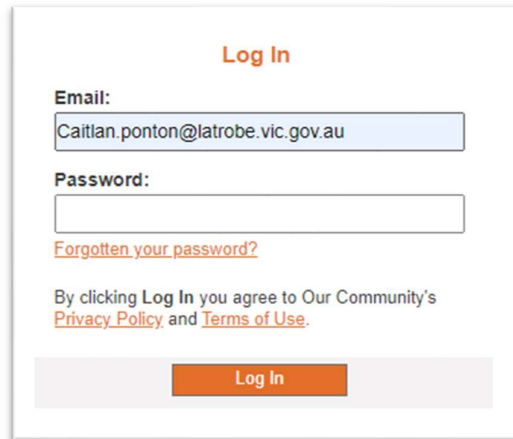
1. Go to the following link - <https://latrobe.smartygrants.com.au/applicant/login>
2. Click on the **register here** button.



3. You will be asked to enter the following details:
  - Your Name
  - Organisation
  - Email address
  - Password
4. Once you have entered these details, click on register. You will be sent an email from 'service@smartygrants.com.au', click on the link to activate your account.
5. If you do not receive an email, please check your **SPAM** email folder.

## Accessing Latrobe City Council's SmartyGrants

1. You can access Latrobe City Council's SmartyGrants page via the following link - <https://latrobe.smartygrants.com.au/applicant/login>
2. When you access SmartyGrants via the Latrobe City Council website you will be directed to Latrobe City Council's log in page.
3. Once on the log in page, enter your email address and password to log in.



The screenshot shows a login form titled "Log In". It includes an "Email:" field with the text "Caitlan.ponton@latrobe.vic.gov.au" and a "Password:" field. Below the password field is a link for "Forgotten your password?". At the bottom, there is a "Log In" button and a disclaimer: "By clicking Log In you agree to Our Community's Privacy Policy and Terms of Use."

4. Once logged in, you will be taken to the following page:

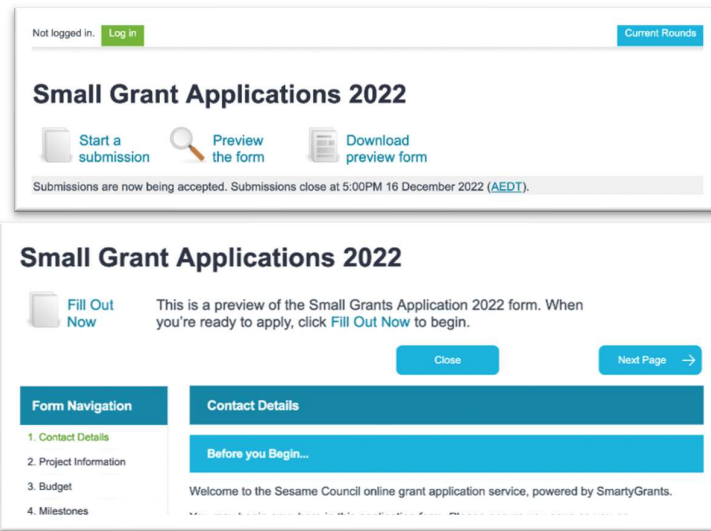


The screenshot shows the user's dashboard after logging in. At the top, it says "Logged in: Caitlan Ponton (Caitlan.Ponton@latrobe.vic.gov.au) My Submissions Log Out". Below this is the "Latrobe City Council" logo and the heading "Current Rounds". There are five grant rounds listed, each with a title, status, and submission deadline:

- 2024/25 Biodiversity on Rural Land Grant**  
Submissions are now open.  
Submissions close 4:00PM 8 August 2024 (AEST).  
[Find out more about 2024/25 Biodiversity on Rural Land Grant...](#)
- 2024/25 DREAM Individual Support Grant**  
Submissions are now open.  
Submissions close midnight 30 June 2025 (AEST).  
[Find out more about 2024/25 DREAM Individual Support Grant...](#)
- 2024/25 Participation Sponsorship**  
Submissions are now open.  
Submissions close 11:00PM 30 June 2025 (AEST).  
[Find out more about 2024/25 Participation Sponsorship...](#)
- 2024/25 Quick Response Grant - Round 1**  
Submissions are now open.  
Submissions close 4:00PM 14 August 2024 (AEST).  
[Find out more about 2024/25 Quick Response Grant - Round 1...](#)
- Weed Control Grant**  
Submissions are now open.  
Submissions close midnight 30 March 2025 (AEDT).  
[Find out more about Weed Control Grant...](#)

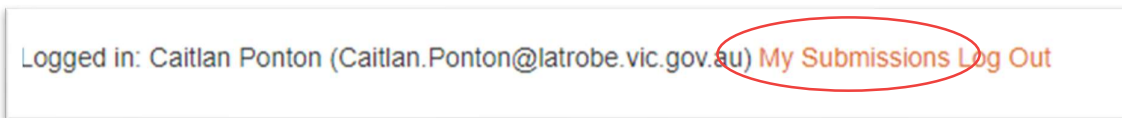
5. This page shows all the current grants that Latrobe City has open. Clicking on the round's link will take you to the application form. You have the following

options: **Start a submission**, **Preview the form** or **Download preview form** (provides a PDF version).



**Note:** You can't fill out the form while in preview mode. To complete the form, you need to complete Step 2.

6. If you would like to access an application you have already commenced, click on the **My Submissions** button at the top of the page next to your email address.



7. Once you click on **My Submissions** you will be taken to a list of all the submissions you have commenced or previously submitted.
8. To continue an application, click on the application ID number and continue your application.

## 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. The form will also automatically save when you move from one page to the next.



When you are logged in, there is a limit to the time of your 'session' duration. For example, if you leave your computer idle for a length of time without saving your work, and then return, the session duration may have ended (or been timed out).

Logout timer: 20 Minutes

### What activities will reset the logout timer after you are logged in?

- Navigating between pages of the form
- Saving

### What happens if the timer expires (reaches 0)?

You will be shown a login option again. If you successfully enter your login details, you will be returned to the page you were viewing.

**Please note:** If you were filling out a form, we attempt to retain any changes you have made, so you can continue working on the form after you log back in. To avoid losing your work **we recommend that you Save Progress regularly.**

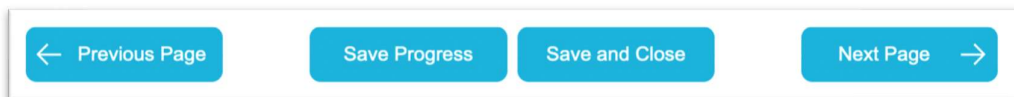
## Elements of the Page

The following elements can be found on the application form.

### 1. Page Buttons

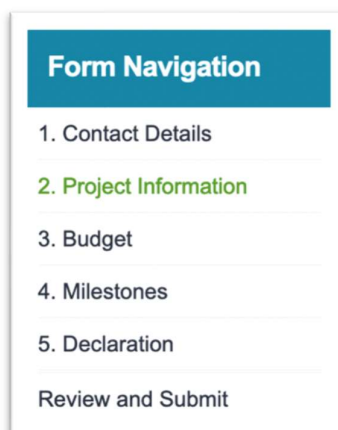
Using these buttons allows you to navigate between the different pages of a form. You can also Save your progress, or Save and Close your form, to return to it at a later time or date.

Note: Your application form is saved every time you navigate between pages.



### 2. Navigation Panel

You can quickly jump to various pages in the form using the form navigation panel.

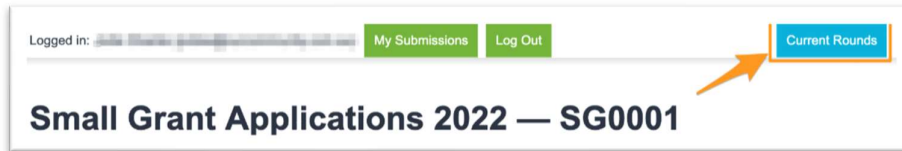


### 3. Form Questions/Fields

Provide responses to the form questions/fields.

#### 4. Current Rounds Page

At any time, you can return to the grant round homepage by clicking on the '**Current Rounds**' button on the top right-hand side of the page.

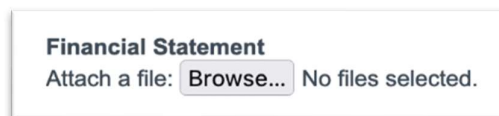
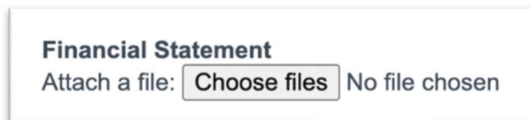


### Fill in the Form

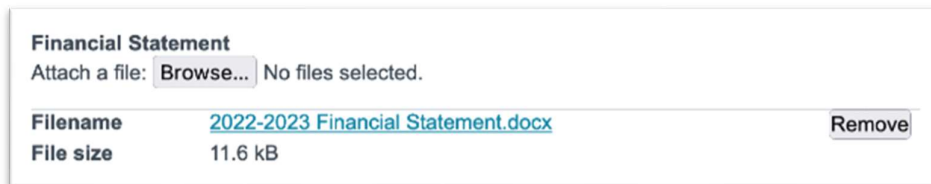
1. You can now complete the application form by providing the required responses.

### Attaching Files

1. 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.
2. **Please Note:** There is a maximum file limit of 25 megabytes. However, it is strongly recommended you try to keep files under 5 megabytes.
3. For a full list of supported file types [click here](#).
4. To **attach a file** you will be given a 'Choose files' option or a 'Browse...' option (dependent on the browser you are using). Click on either of these options, select the file you wish to attach.



5. The file will begin to upload, when the upload is complete a link to the uploaded file will be available, along with the option to remove the file.  
**Note:** ensure that your file is named clearly.



### Save and Close

1. If at any stage, you wish to save your application and close it you can do so by clicking **Save and Close**.



← Previous Page    Save Progress    Save and Close    Next Page →

2. You can return to your application at any time prior to the closing date of the grant round and continue your application, simply by logging back into your account per **Step 2**.
3. 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.

Logged in: Caitlan Ponton (Caitlan.Ponton@latrobe.vic.gov.au) [My Submissions](#) [Log Out](#)

## Review and Submit

### Review, Addressing Issues and Submit

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

**Form Navigation**

- 1. Contact Details
- 2. Project Information
- 3. Budget
- 4. Milestones
- 5. Declaration

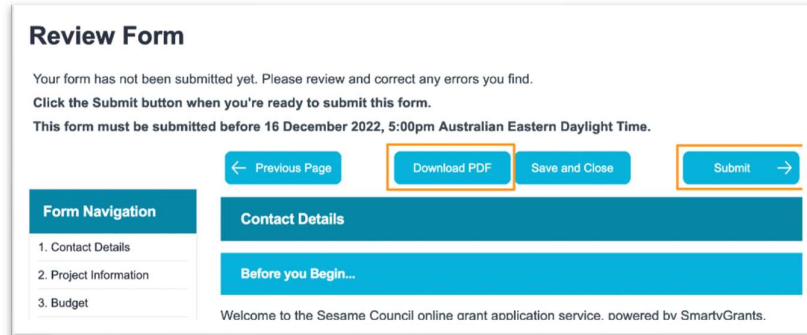
**Review and Submit**

2. This will allow you to Review the full application before confirming you would like to Submit.
3. Any items that need to be addressed, for example a required field that has been missed, will be highlighted in red, and you can navigate to the relevant page to make any edits.

**Applicant Admin Contact Primary Email**  
daisyexample.com  
Must be an email address.

This response is not a valid email address.  
[Go to page](#)

4. You also have the option to download a PDF of the form to save or print.
5. **Note:** when you Submit, you will receive a confirmation of submission email with a PDF of the submitted form attached. You can also log back into SmartyGrants at any time and view your completed application. This will appear under the My Submissions tab.



### Important!

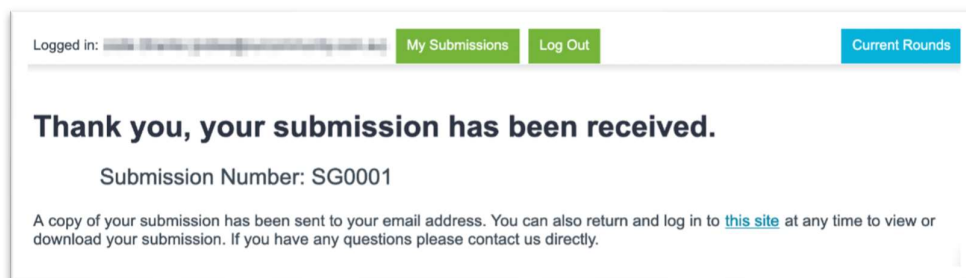
**Once your form has been submitted, you are unable to make any changes.** If you do require changes to be made, you will need to contact the funder directly and enquire as to whether they can re-open your form.

6. When you have reviewed your form and ready to submit, click Submit.

## Confirmation

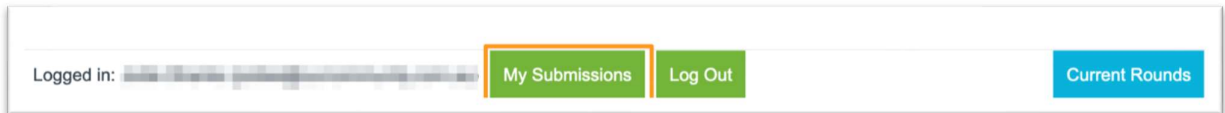
### Confirmation of Submission

1. You will receive a confirmation message on screen that your application has been submitted and the funder has received your application. You will also receive a confirmation email with a PDF copy of your submission attached (excluding file uploads - however, file names will still be shown for reference).

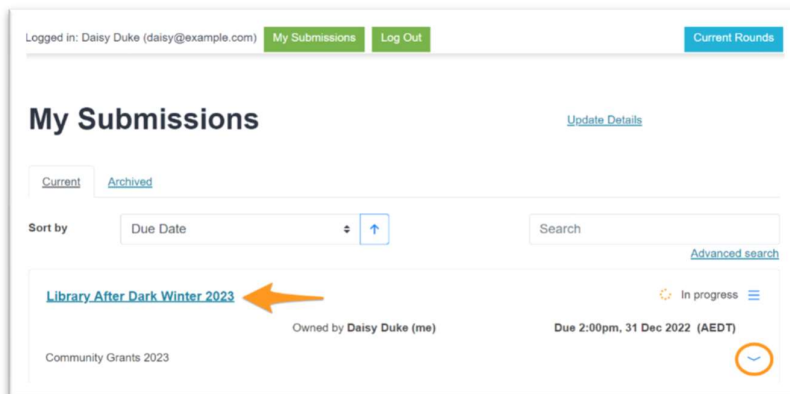


## Start Another Submission

1. To view and access all your submissions, you will need to be logged into your account on the grantmaker's funding site and then click on **My Submissions**.
2. Alternatively, you can log into [app.smartyfile.com.au](http://app.smartyfile.com.au) if you wish to view or manage submissions across multiple grantmakers, in one place.



3. You can then choose which application you wish to access, by clicking on the appropriate submission link or by clicking on the drop-down arrow (**Note:** any additional form the funder requires you to complete will be accessed the same way).

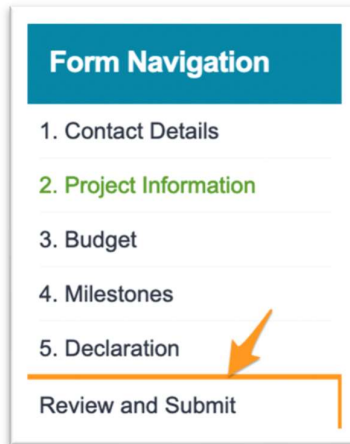


## Viewing / Saving / Printing Applications

If you wish to save a copy or print your submission you will need to download a PDF version. There are a couple of ways to access the option to download a PDF.

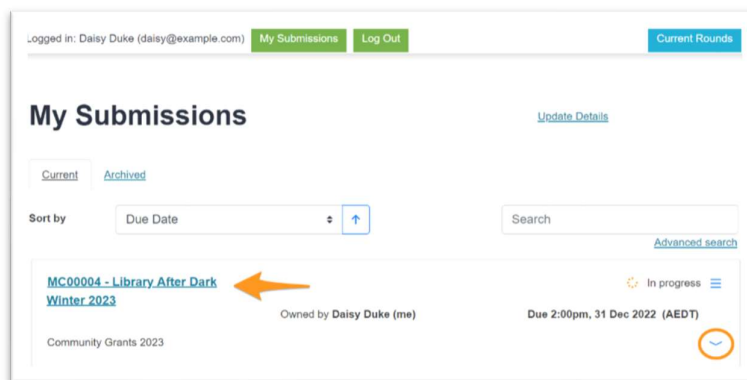
### Forms in Progress

1. Simply click on **Review and Submit** in the form navigation panel. You will then see a **Download PDF** button at the top of the form.
2. Start by clicking on the **Review and Submit** link at the bottom of the navigation box.



## Forms Submitted

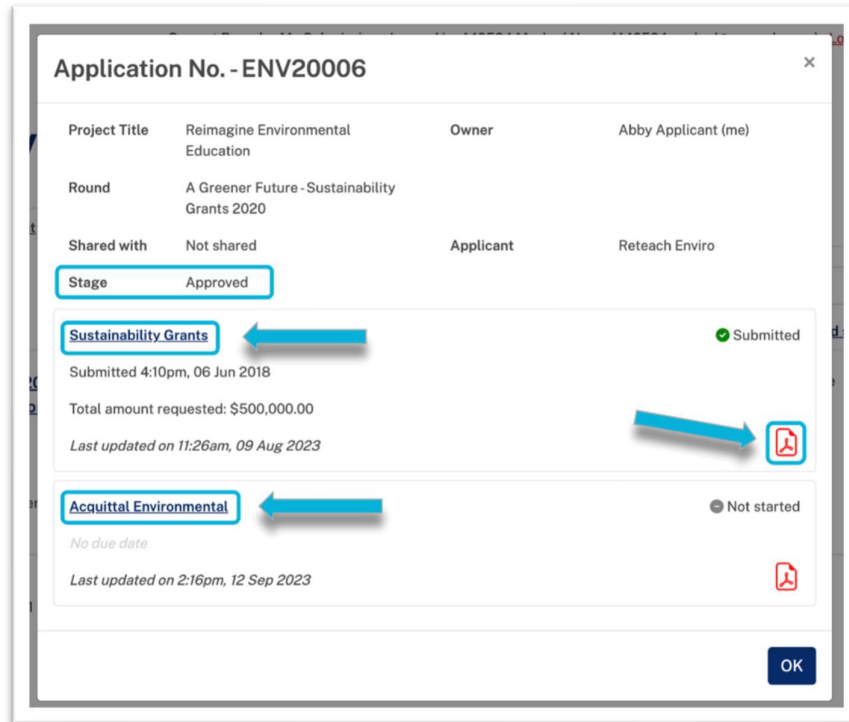
1. Once submitted, you will receive a confirmation of submission email with a PDF copy of your form attached.
2. Alternatively, you can login to the grantmaker's funding site and access the form under **My Submissions** (where you can also search and sort submissions). Click on the relevant submission link, then click on the PDF icon if you wish to download a copy. This includes finding any additional forms the Grantmaker may ask you to complete.



**Note:** If you wish to access submissions across multiple funders or share/collaborate with team members, you can login to [app.smartyfile.com.au](http://app.smartyfile.com.au). If you do not already have an organisation profile, you can create one and add team members. Click on **My Submissions** once logged in. For further information on functions available visit [appicanthelp.smartygrants.com.au/smartyfile](http://appicanthelp.smartygrants.com.au/smartyfile)

## Accessing Additional Application Information

1. Information about an application can be viewed by clicking on the application ID number from the My Submissions page.
2. This will show a pop-up with additional information. See an example below:

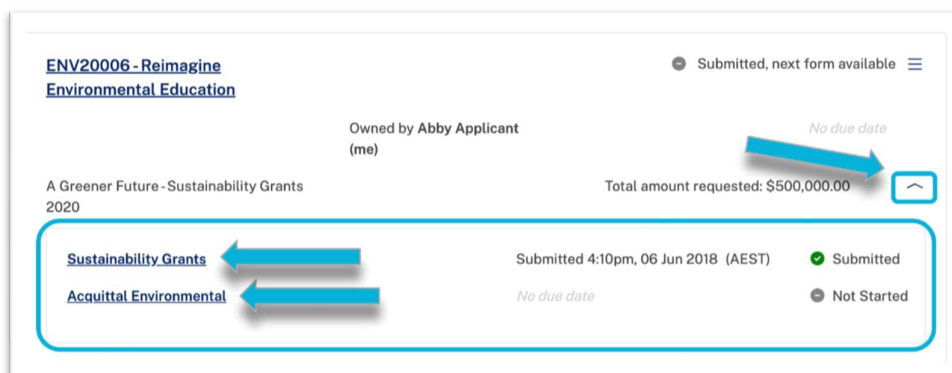


- **PDF** - clicking this icon will download a PDF copy of the application.
- **Stage** - this may appear on certain applications where the grant funder wishes to communicate which stage your application has reached within their process (e.g. assessment stage, approved etc.)
- **Forms** - all forms linked to the application will be listed here, starting with the application form.

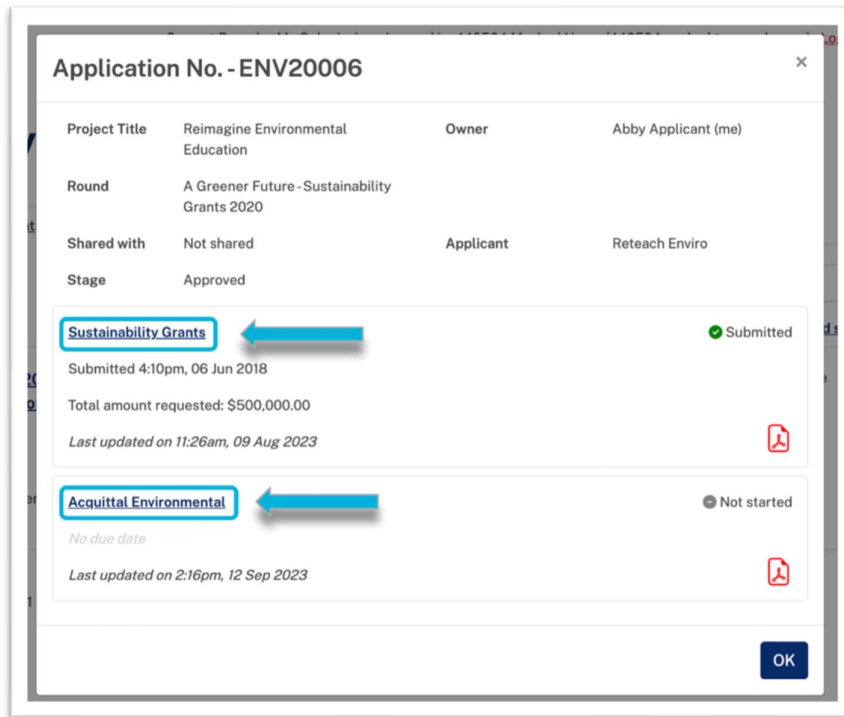
## Accessing Acquittals or Subsequent Forms

Grant funders may add additional forms to your initial grant application form, such as acquittals or milestone reports. To view additional forms, you can either:

1. Select the small blue down arrow and then click on the name of the form you wish to access:



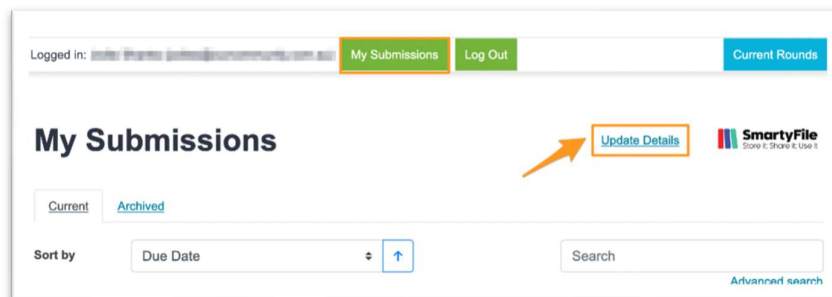
2. Click on the application ID to view a pop up with additional information about the application. Then click on the relevant form name there:



## Update your Account Details or Password

### Update Details

1. To update your name or change your password, head to the **My Submissions** page and click on **Update My Details**



## Edit Details

### Your account

Changes will be visible next time you log in.

**Name:**

**Organisation:**

**Email address:**  
daisy@example.com  
If you need to change your email address, contact [service@smartygrants.com.au](mailto:service@smartygrants.com.au)

[Save changes](#)

### Your password

Your password must:

- include at least 8 characters
- include uppercase letters
- include lowercase letters
- include non-alphabetical characters
- include numbers
- include a non-alphanumeric character (i.e., a symbol)

**Old password:**

**New password:**

**Confirm new password:**

[Update password](#)

## Change Email Address

To change the email address associated with your account you will need to email [grants@latrobe.vic.gov.au](mailto:grants@latrobe.vic.gov.au).

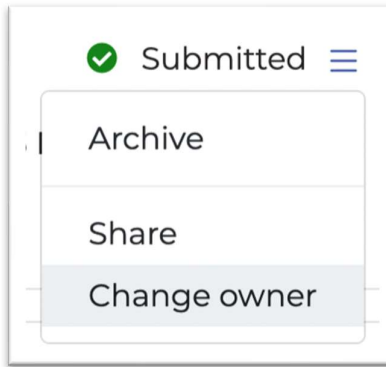
## Change Owner of Submission

### Update Owner/User of a Submission

1. If you want access to update who the owner/user is of submissions, you will need a SmartyFile organisation profile. If you are an individual and not part of an organisation, you can contact the funder directly to request the change.



2. If you do not already have an organisation profile, you can create one and add team members by heading to [app.smartyfile.com.au](http://app.smartyfile.com.au).
3. Once you have added team members to your organisation profile (or your organisation's Administrator has), you may have access to change the owner on a submission.
4. Navigate to **My Submissions** and click on the hamburger icon on the relevant submission, you will see a **Change owner** option.
5. This will then give you a list of team members of your organisation that you can assign the submission to.



6. For further information on functions available visit [applicanthehelp.smartygrants.com.au/smartyfile](http://applicanthehelp.smartygrants.com.au/smartyfile)

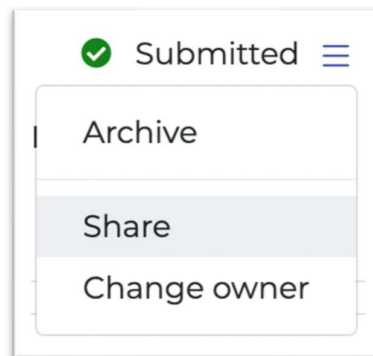
## Share a Submission

### Share a Submission

1. If you want access to share submissions, you will need a SmartyFile organisation profile.



2. If you do not already have an organisation profile, you can create one and add team members by heading to [app.smartyfile.com.au](http://app.smartyfile.com.au).
3. Once you have added team members to your organisation profile (or your organisation's Administrator has), you may have access to share the submission with team members who have been given the appropriate permission within your SmartyFile organisation.
4. Navigate to **My Submissions** and click on the hamburger icon on the relevant submission, you will see a **Share** option.
5. This will then give you a list of team members of your organisation that you can share the submission with.



6. For further information on functions available visit [applicanthehelp.smartygrants.com.au/smartyfile](http://applicanthehelp.smartygrants.com.au/smartyfile)



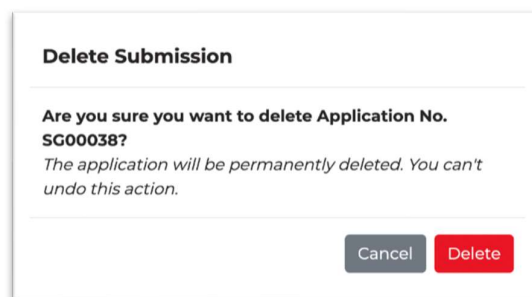
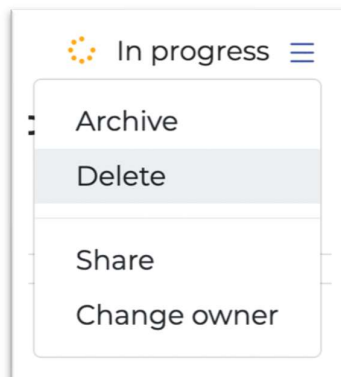
## Delete and Archive Submissions

### Delete

1. You can delete submissions with an 'In progress' status that you may have started in error.
2. This can be done when logged in to the funder's applicant site or through [SmartyFile \(app.smartyfile.com.au\)](http://app.smartyfile.com.au). Once logged in via either site, click on **My Submissions**, and click on the hamburger icon on the relevant submission.
3. Click on the **Delete** option.

#### Important!

The submission will be permanently deleted; you can't undo deletion. If you wish to proceed, click on the red **Delete** button.

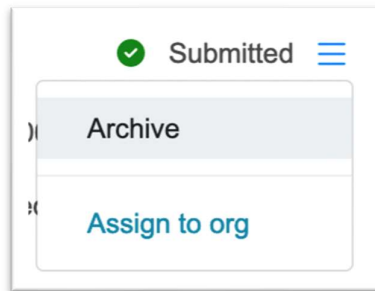


### Archive/Unarchive

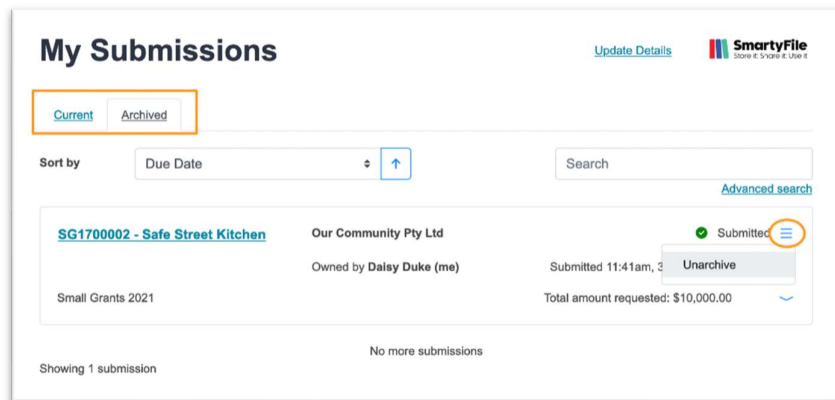
1. You can archive a submission that you no longer want to see on the default (current) view tab. You may want to do this for any past submissions that are completed and have no further action required (such as reporting back to the funder). Note that archived submissions can always be reactivated to the current tab if needed.
2. This can be done when logged in to the funder's applicant site or through [SmartyFile \(app.smartyfile.com.au\)](http://app.smartyfile.com.au). Once logged in via either site,

click on **My Submissions**, and click on the hamburger icon on the relevant submission.

3. Click on the **Archive** option:



4. To **Unarchive**, click on the **Archived** tab under my submissions. Click on the hamburger icon next to the relevant submission and select **Unarchive**.



## FAQ's

1. For a full list of frequently asked questions please visit [applicanthehelp.smartygrants.com.au/applicant-faq's](http://applicanthehelp.smartygrants.com.au/applicant-faq's)

## Section 2 – SmartyFile

### User Registration and Login

If you would like to set up a SmartyFile account and are already registered with SmartyGrants, you will already have a login. To log in, head to

[app.smartyfile.com.au](http://app.smartyfile.com.au)

If you do not have a SmartyGrants account, to register for SmartyFile, head to [smartyfile.smartygrants.com.au/applicant/register](http://smartyfile.smartygrants.com.au/applicant/register).

**SmartyFile**  
Store it: Share it: Use it

Username

Password

[Forgotten your password?](#)  
New to SmartyFile/SmartyGrants? [Sign up here](#)


By clicking **Sign In** you agree to Our Community's [Privacy Policy](#) and [Terms of Use](#).

[Sign In](#)

**Contact**  
[service@smartyfile.com.au](mailto:service@smartyfile.com.au)  
03 9320 6888

**Resources**  
[Help](#)  
[FAQs](#)

**More**  
[About SmartyFile](#)  
[Copyright](#)  
[Privacy](#)

 **ourcommunity.com.au**  
Where not-for-profits go for help

### Create your Organisation Profile

To create your organisation profile:

1. Click on **New Organisation** to create a profile.

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

If the ABN you have entered has been used, you have the option to request to 'join' one of the existing organisations OR create a new organisation profile. An ABN can be used more than once to create an organisation profile.

3. Enter the **name** of your organisation.

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

4. Complete organisation details.

These details can be auto filled into forms when completing submissions. Click on the pencil icon to edit or add details:

- ABN details.
- Contact Details.
- Bank Accounts.
- Head of Organisation.
- Mission statement.

## OrgHQ Jacana Cricket Club

Details [Users](#) [Roles](#) [Security](#)

### Organisation Details

**Display name**  
Jacana Cricket Club

**ABN**  
87445926832

#### ABN Details

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

### 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

### Head of Org

**First name**  
Daisy

**Last name**  
Duke

**Position**  
Chairperson

**Email**  
daisy@example.com [Primary](#)

**Phone**  
0422 123456 [Primary](#)

You can **tag** any of the sets of contact details as **Primary**, **Postal**, **Office** or **Other**.

Select **Add another** to add additional contact details.

**Contact Details**

**Address**  
 Lorraine Cres, Broadmeadows, VIC, 3047, Australia

**Add another...**

**Email**  
 cricketsecretary@example.com

**Primary \***

**Primary**

Postal

Office

Other

## Pre-Filling Organisation or Profile Information into SmartyGrants Forms

You can pre-fill information from your organisation profile when completing a submission using SmartyGrants. You will have the option to pre-fill the organisation contact information and bank details, where requested, when clicking into a pre-fillable field. If you have logged into SmartyFile and completed your 'My Profile' details, they will also be available for pre-fill. You can still manually update any field that has been pre-filled if you need to.

**Applicant Details**

**Applicant**  
 Individual  Organisation [Clear](#)

**Organisation Name**

Prefill from SmartyFile...  
 Our Community Pty Ltd

**Applicant Primary Address**  
 Search

**Applicant Primary Phone Number**  
 Must be an Australian phone number.

**Applicant Primary Email**  
 Must be an email address.

**Additional Organisation Information**

If you are not part of an organisation, you can pre-fill information from your profile as an individual. If you have logged into SmartyFile and completed your 'My Profile' details, they will also be available for pre-fill. You can still manually update any field that has been pre-filled if you need to.

**Individual Contacts**

**Applicant**

**Applicant Name**

Title	First name	Last name
▼		

**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**

## User Roles

There are five different levels of access that can be assigned to users:

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

The functions available to each role are outlined below. As an Administrator, when assigning a role to a user, you can define their access levels and whether they have permission to make submissions.

Administrators can create a custom role for their organisation if none of the default roles suit. To create a custom role, toggle the function areas you wish to enable for that role. They will appear green if that function is active.

OrgHQ		Jacana Cricket Club				
<a href="#">Details</a> <a href="#">Users</a> <a href="#">Roles</a> <a href="#">Security</a>						
Permissions	Administrator	Author	Contributor	Viewer / Analyst	Custom <sup>①</sup>	
Manage Organisation <sup>①</sup>	<input checked="" type="checkbox"/>	-	-	-	<input type="checkbox"/>	
View Organisation Profile <sup>①</sup>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	-	<input type="checkbox"/>	
Create / Start Items	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	-	<input type="checkbox"/>	
Edit Items <sup>①</sup>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	
View Items <sup>①</sup>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Submit Items <sup>①</sup>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	-	<input type="checkbox"/>	

Notes on permissions:

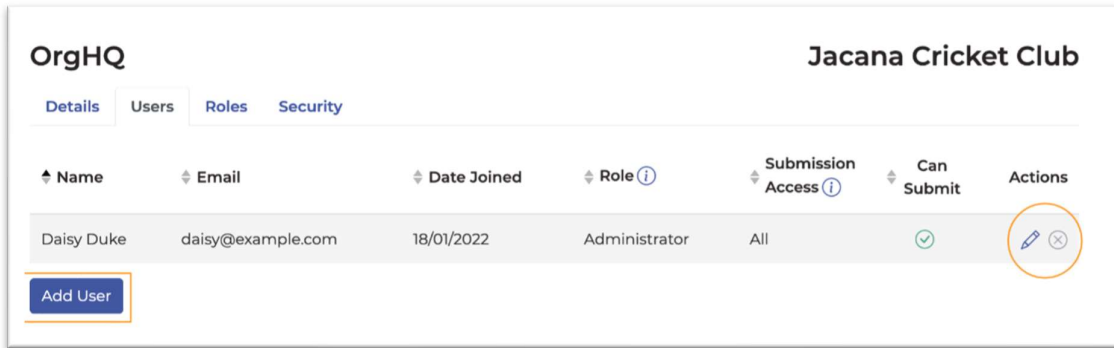
- **Manage organisation:** this includes permissions to manage organisation profile and user access.
- **View organisation profile:** This includes permissions to manage organisation profile and user access.
- **Edit items:** changing submission ownership/user is restricted to users with Administrator roles.
- **View items:** users with Create/Start and Edit Items permission automatically have access to view submissions.
- **Submit items:** this permission needs to be further configured on individual user level. Go to **Users** tab and click **Edit** user to set this permission.

## Add or Edit Users (Organisation Members)

To add or edit users, click on the users tab. This will list any users with access. An Administrator has access to add/edit/remove users:

- **Remove** a user by clicking on the X icon under 'Actions'.
- **Edit** a user by selecting the pencil icon under 'Actions'.
- **Add** a user by clicking on the **Add User** button. Enter the email address of the user you wish to add and select the role you wish them to have (user role access is outlined above). Select **Add** to complete adding the user.





Clicking on **Add User** opens the below dialogue box:

**Add User** ✕

Email

Please select a Role for the User

Administrator
Author
Contributor
Viewer / Analyst

Manage Organisation	✓	-	-	-
View Organisation Profile	✓	✓	-	-
Create / Start Items	✓	✓	-	-
Edit Items <sup>(1)</sup>	All	Limited ▾	All / Limited	-
View Items <sup>(1)</sup>	All	Limited ▾	All / Limited	All / Limited
Submit Items <sup>(2)</sup>	Optional	Yes ▾	-	-

<sup>(1)</sup> **Limited** - Access to submissions owned by, or shared with, the user  
**All** - Access to all submissions within the organisation

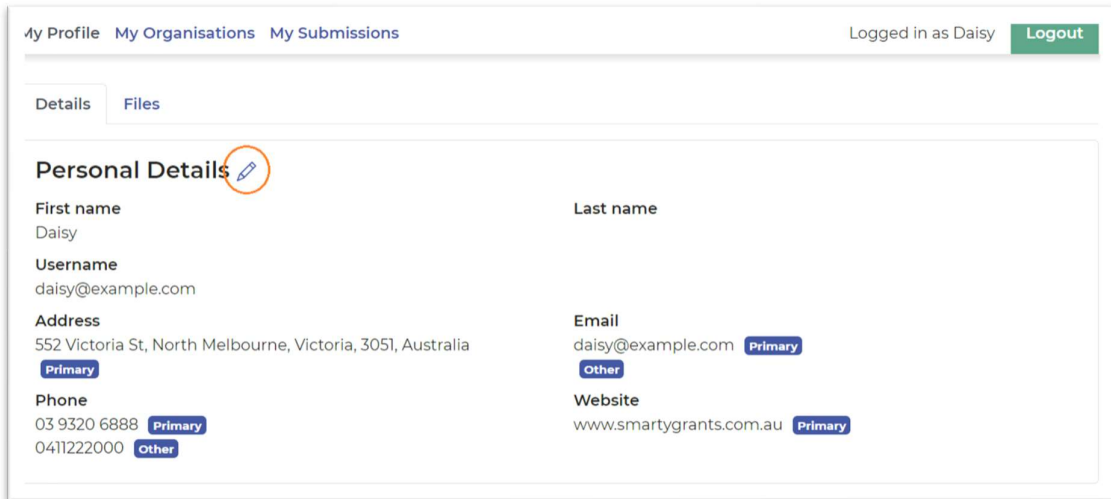
<sup>(2)</sup> **No** - Cannot submit items on behalf of the organisation  
**Yes** - Can submit items on behalf of the organisation

Cancel Add

## 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 application forms.

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

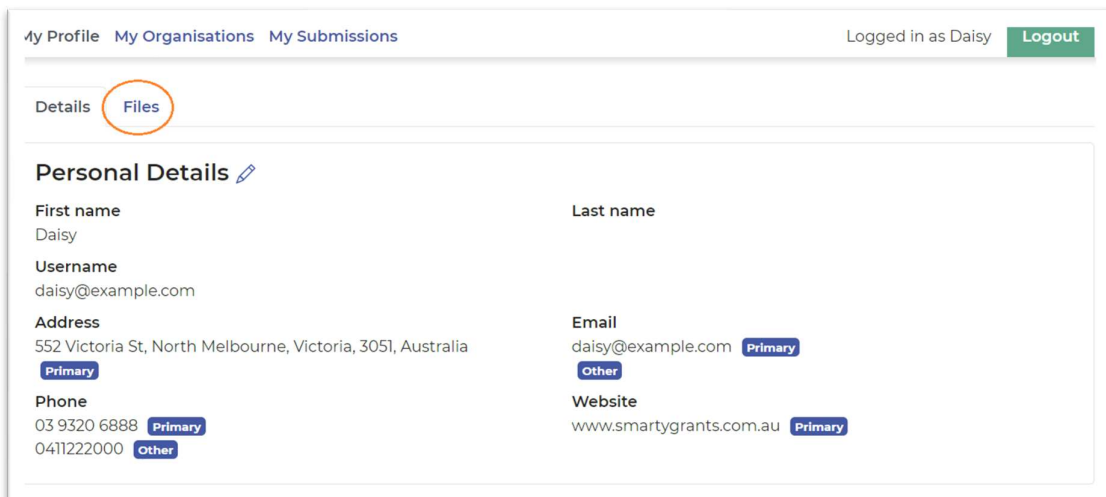


## File Storage

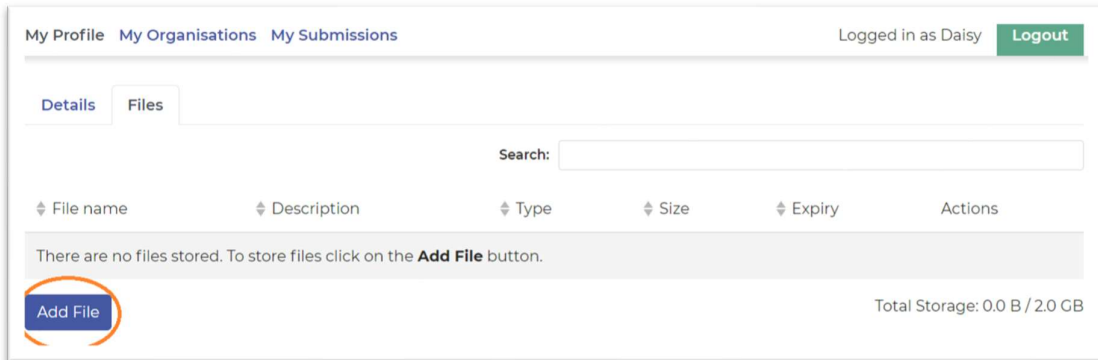
Applicants with a SmartyFile profile will have the ability to upload and store files either via their individual 'My Profile' or under any of their organisational profiles via a **Files** tab. These centrally stored files can then easily be accessed by applicants completing any attachment fields/questions in forms.

Users who have permission to manage an organisation have access to upload and manage the files, whilst those with access to edit and submit submissions can access the files when completing a form. Users can include a document expiry date and are notified as documents are approaching expiration.

To upload a file, select the **Files** tab when in the 'My Profile' tab.



Select the **Add File** button.



Select the file you would like to upload to SmartyFile from your device's file browser by selecting the **Browse** button.

You can add an optional description and expiry date. Then to upload the file, select the **Add** button.

Once files have been uploaded into SmartyFile, you will have them as an option when filling out a form. To do this, when filling out the form, select the **Select stored file** button.

### Supporting Documents

**Upload current insurance documents**

Attach a file:

Select the file you would like to upload from the available options by selecting the check box to the left of the file name.

You can search for a file by the file name using the **Search** field in the top right.

If the file you are looking for is not shown, please confirm that it has been uploaded correctly, and the expiry date (if set) has not passed.

Once you have selected the file you wish to upload into the form, select the **Add to form** button.

### Select stored file

By adding a file to your form only the file attachment is made available to the funder. Search:

File name	Description	Expiry date
<input checked="" type="checkbox"/> Certificate of Currency Sept2023.pdf		13/09/2024
<input type="checkbox"/> Proposed budget_20231120.xlsx	Draft budget for the new building project as of 20/11/2023. Refer to this when filling out application. Confirm details before submitting anything as this is subject to change.	30/11/2023

Once the **Add to form** button has been selected, the file will have been uploaded.

Save Progress Save and Close Next Page

**Form Navigation**

1. Supporting Documentation

---

Review and Submit

### Supporting Documentation

**Upload current insurance documents.**

Attach a file:

<b>Filename</b>	<a href="#">Certificate of Currency Sept2023.pdf</a>	<input type="button" value="Remove"/>
<b>File size</b>	40.5 kB	

Save Progress Save and Close Next Page

## My Submissions

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, delete drafts, assign submissions to an organisation, and 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.

**SmartyFile**  
Store it. Share it. Use it.

My Profile My Organisations My Submissions

Logged in as Eddie Example Logout

### My Submissions

Current
Archived

Sort by Due Date

Search keywords

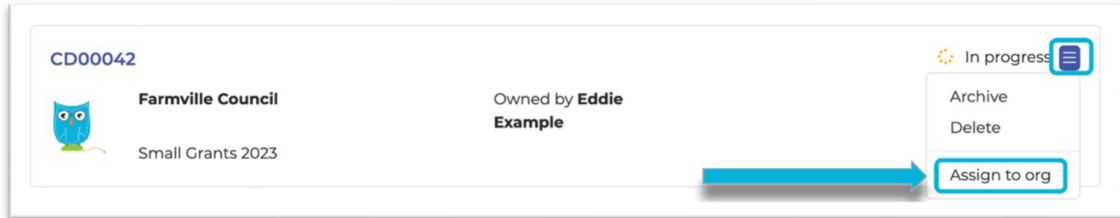
[Advanced search](#)

<span style="border: 1px solid #0070c0; border-radius: 3px; padding: 2px;">CD00042</span>	<p><b>Farmville Council</b> Small Grants 2023</p>	<p>Owned by <b>Eddie Example</b></p>	<p><span style="color: #0070c0;">🔄</span> In progress <span style="font-size: 0.8em;">☰</span></p> <p style="color: #999;">No due date</p> <p style="text-align: right;"><span style="border: 1px solid #0070c0; border-radius: 3px; padding: 2px;">⌵</span></p>
<span style="color: #0070c0;">MHA2200002 - Bike race for mental health</span>	<p><b>Regional NSW</b> Mental Health Awareness 2022</p>	<p>Owned by <b>Eddie Example</b></p>	<p><span style="color: #27ae60;">✔</span> Submitted <span style="font-size: 0.8em;">☰</span></p> <p>Submitted 5:37pm, 17 May 2023 (AEST)</p> <p style="text-align: right;"><span style="font-size: 0.8em;">⌵</span></p>

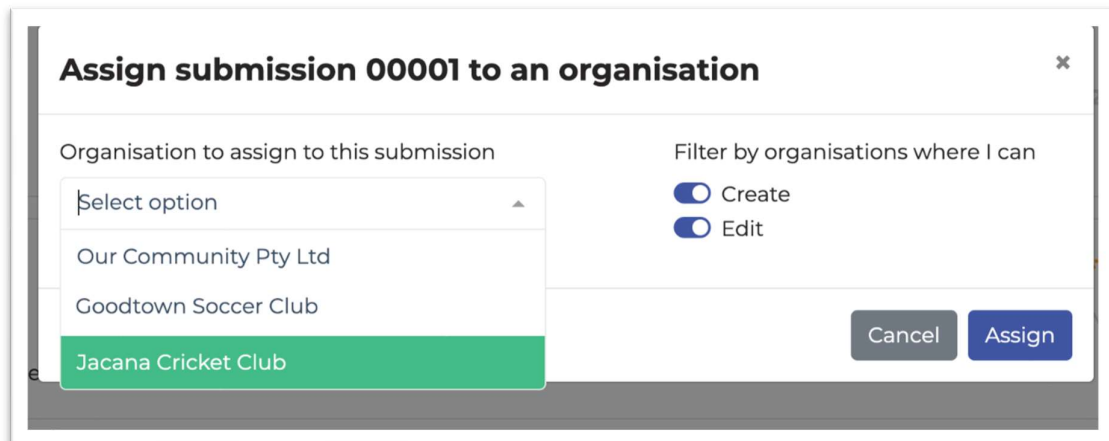
## Assign an Existing Application to one of your Organisations

If you have just created a SmartyFile profile for your organisation, you may have historical applications that you would now like to assign to your organisation.

Click on **My Submissions**, select the submission you wish to assign, click on the hamburger icon, and select **Assign to org**. Select the organisation and click on **Assign** to confirm.

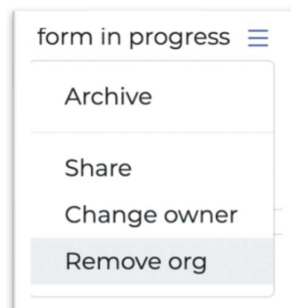


Clicking on **Assign to org** opens the below dialogue box:



## Remove a Submission from an Organisation

Administrators can remove a submission from their organisation, this can be done by selecting the hamburger icon on a submission and selecting **Remove org**. Once a submission has been removed, the Owner becomes the user in control of that submission.



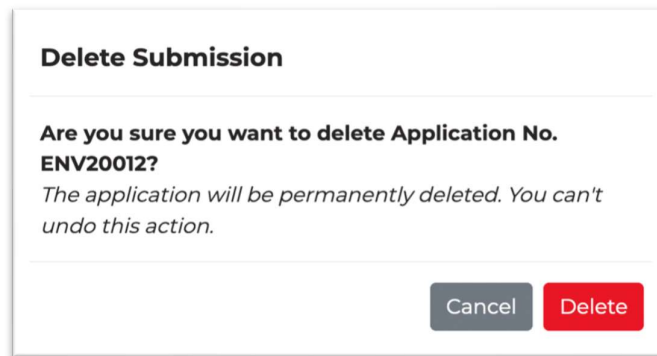
## Delete a Draft Submission

Applications that have a status of 'In progress' can be deleted.

1. Click on the hamburger icon next to the status and select **Delete**.

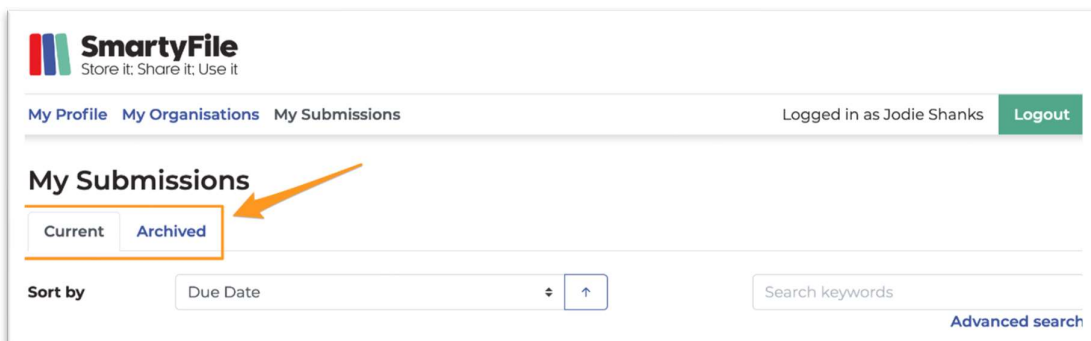


2. Confirming deletion means the application will be PERMANENTLY deleted and unable to be retrieved. If you are sure, click **Delete** to confirm.



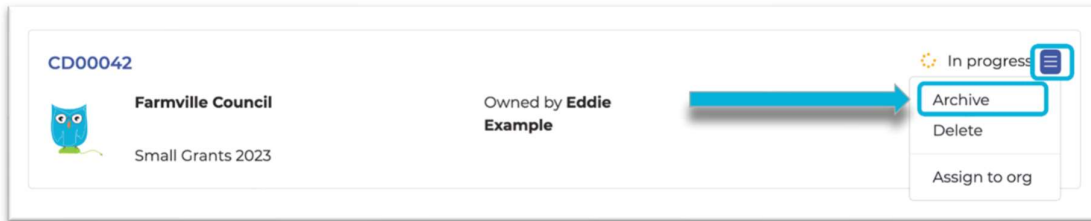
## Archive a Submission

You can archive a submission that you no longer want to see on the default view tab. You may want to do this for any past submissions that are completed and have no further action required (such as approved acquittals). Note that archived submissions can always be reactivated to the current tab if needed.



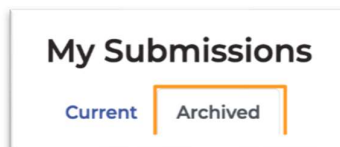
## To Archive a Submission

1. Click on the hamburger icon next to the status and select **Archive**.

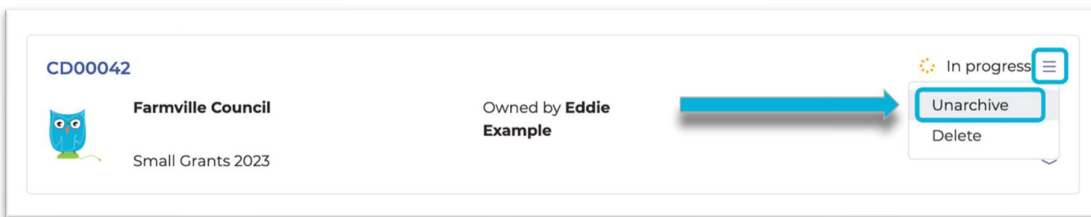


## To Unarchive a Submission

1. Click on the **Archived** tab:



2. Click on the hamburger icon next to the status and select **Unarchive**.



## More Information

For addition features and in-depth instructions, visit:  
<https://applicanthelp.smartygrants.com.au/smartyfile/#SmartyFile-Filestorage>



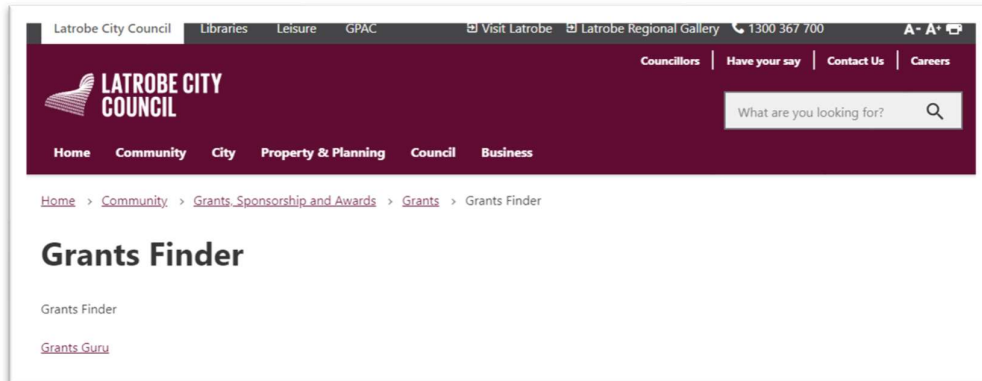
## Section 3 – GrantGuru

### Registration and Login

#### Create a Free Account

To register for Grant Guru for **free**, you can do so by visiting the following link on Latrobe City Councils website:

[https://www.latrobe.vic.gov.au/Community/Grants\\_Sponsorship\\_and\\_Awards/Grants/Grants\\_Finder](https://www.latrobe.vic.gov.au/Community/Grants_Sponsorship_and_Awards/Grants/Grants_Finder)

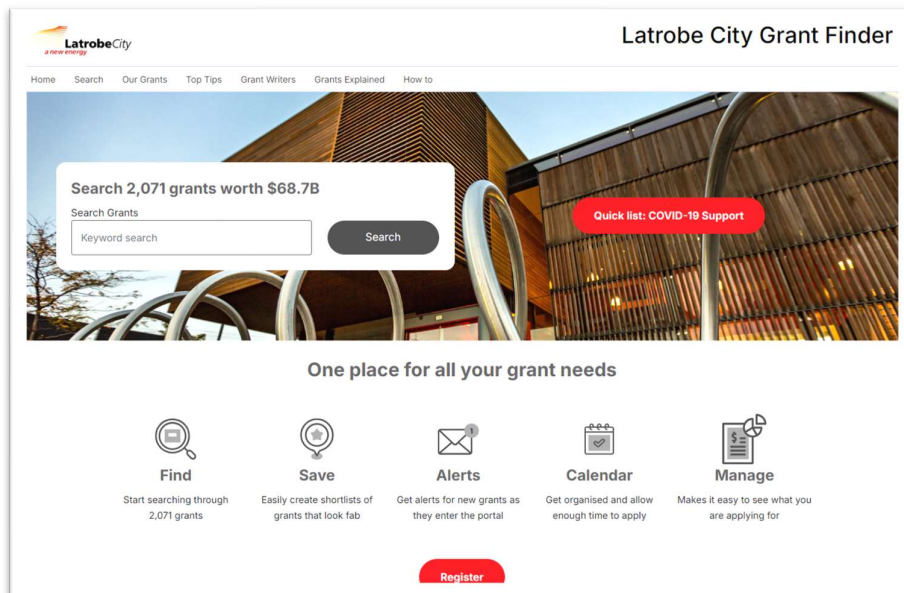


#### Register and Login

This will take you to the following page where you can register for an account:

<https://grantguru.com/au/latrobe/register>

1. Click on the **Register** button



2. Enter your email address and select **Next**.

EMAIL

Your email to login with

Email address

Who are you looking for grants for?

My Organisation or Myself

My clients  
Latrobe Council is generously providing you access to their grant portal to find grants for your organisation only - data and access cannot be shared with a third party. To inform your clients about the latest grants and information found on GrantGuru, please [register here](#) instead.

My members or constituents  
Latrobe Council is generously providing you access to their grant portal to find grants for your organisation only - data and access cannot be shared with a third party. To give access or share the latest grants and information found on GrantGuru with your members or constituents, please [register here](#) instead.

Next

3. If you do not have an account, you will need to provide your details and create a password.
4. Click on **Next**.
5. Once you have clicked **Next** an activation email will be sent to the registered email address.
6. You will find an email from 'grantguru@grantguru.com', click on the link to activate your account.  
If you do not receive an email, please check your **SPAM** email folder.

PERSONAL

Username

Your name

First name

Last name

[Generate secure password](#)

Password

Password

Confirm password

Mobile

+61 Mobile number

Next

7. Tick each of the boxes to agree to the Terms of Use and click **Sign Up**.

✓    ✓    **TERMS**

**Agreements**

I am not a consultant (accountant, advisor, grant writer, etc) and I will not use this site to supply grants data to third parties.  
If you are a consultant, [go back](#) and select "My clients" when answering the "Who are you looking for grants for" question. We have special tools to help you.

I agree to the Terms of Use:

**Terms of Use**  
Effective from 6 December 2021

**Application**  
By accessing this website, you will be using the online services and delivery platform of GrantGuru Pty Ltd Pty Ltd (ACN 117 653 317) (the Services). These terms and conditions (these **Terms**) govern the terms upon which GrantGuru (we, us or our) grant you access to the Services and the information, software, technology, ideas, algorithms, risks, databases, documentation, training materials, templates, documents and other content that we

**Sign Up**

## Personalise your Profile

### Getting Familiar

#### Profile based grant search

Click on this tile to see the results of a grant search based on your profile. You can change your profile in the Account area.

**2,102**  
**GRANTS MATCH**  
Grants match your profile

#### Calendar

Select a month to see what open and closing dates are coming up soon!

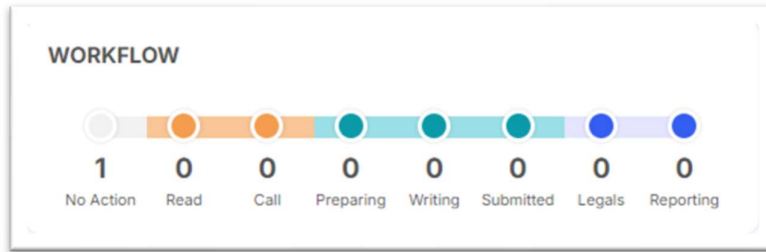
**CALENDAR**  
Dates in your lists. Select a month to see the grants.

Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun

[expand](#)

#### Workflow diagram

The workflow count is now an easier to read diagram to help you see where to focus your efforts.



### Recent alerts

If you have email alerts set up, you'll see the most recent ones we let you know about here.



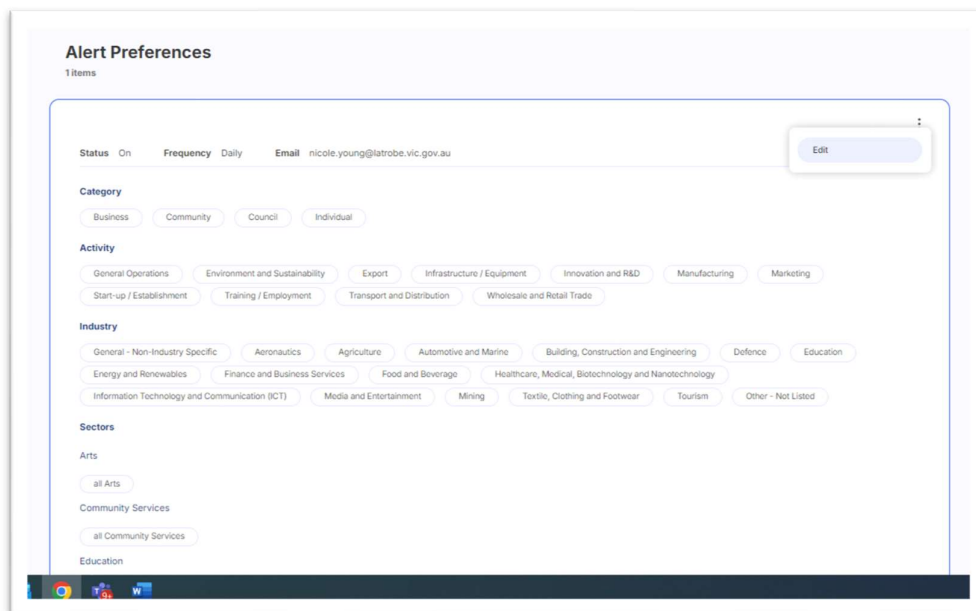
### Profile Preferences

To edit your alert preferences click **Alerts**.



Here you can edit your alert preferences by adding or removing tiles that are relevant to you.

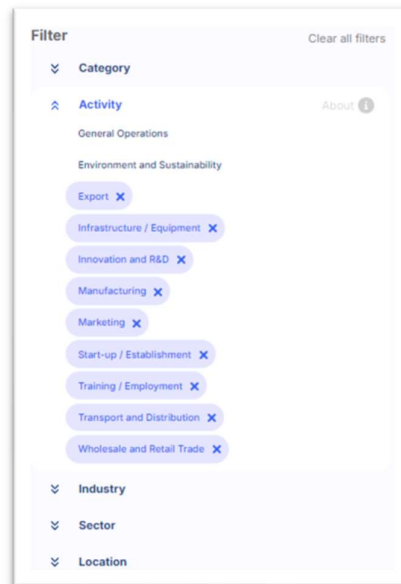
To do this, click the three dots and the click **Edit**.



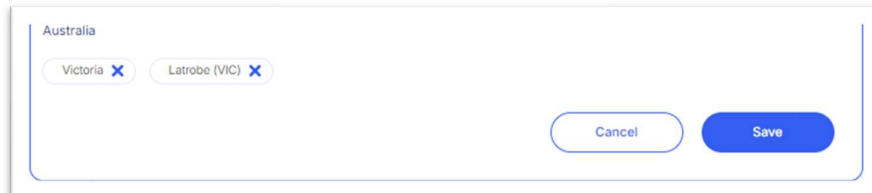
## Filter

In the Filter section, you can sort between **Category**, **Activity**, **Industry**, **Sector** and **Location**.

To ensure that you receive alerts for grants of your interest, go through each list and either click to highlight an item of interest, or click the 'x' next to the item to remove it from your preferences.



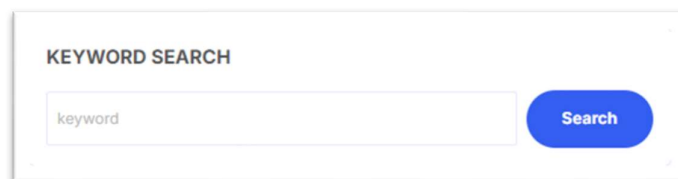
Once you have selected each of your preferences, don't forget to click **Save** at the bottom of the page.



## Apply for Grants

### Searching for Grants

You can type in key words into the search field to help navigate to a specific grant.



## Tips!

Don't use a keyword if you can use a filter. Using a keyword means you might be missing things relevant to you that use a similar, but different word. Use an asterisk \* as a wildcard character – for example a search for sustain\*, you'll get results that include 'sustainability', 'sustainable', 'sustained' and more.

Wow that's a lot of grants! Choose a few more filters to refine your results.

## Applying for Grants

Once you have found a grant and would like to see more information, click the small blue square with the arrow which appears next to the program name.

This will show you the Overview of the grant.

**100 Women Grants** [↗](#)

This program aims to award grants to organisations that advance the safety, health, education and economic freedom of women and girls.

**Closing Information**  
This program is available annually. The next funding round is expected to open in early 2025.

**Status** ● Pending **Closed** 08 May 24 Closed 2 months ago **Max Funds** \$50,000

In Lists	Owner	Seeking	Priority	Stage	Progress
My favourites	Me	\$0	Nice to get	Watching	No Action

[Edit](#) [Minimise](#)

You can click between the following tabs or scroll to the information you are looking for.

[Jump to](#) [Who can Apply](#) [Main Assessment Criteria](#) [Dates](#) [Downloads\(2\)](#) [Contact](#)

Click on **Add to My favourites**, to come back to this grant at a later date.

[★ Add to My favourites](#)

When you are ready to apply for a grant, you can either click on the **administrator** link at the bottom of the page or click on the **website** link under the Contacts tab on the right-hand side of the page.

This will take you to the direct website for the grant which you are applying for, where you can follow prompts to 'Apply Now'.

## Downloads

Please use these documents as a guide only - always get the latest direct from the [administrator](#).

### Contact

**Administrator**

**Phone**

**Email**

**General Website** [Visit website](#)

**Program Website** [Visit website](#)

## More Information

For addition support, visit:

<https://grantguru.atlassian.net/servicedesk/customer/portals>