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SmartyGrants
Software, data science & grantmaking intelligence

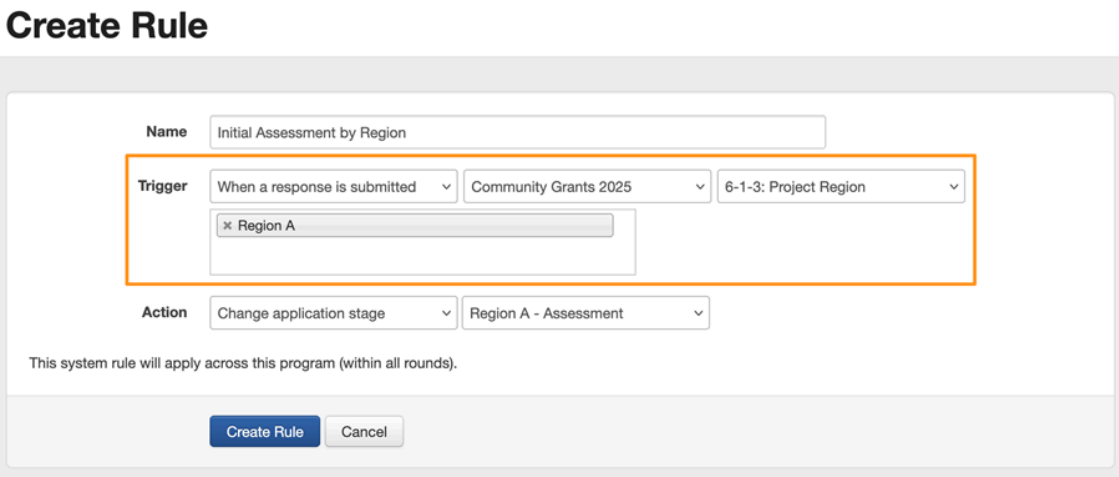
SmartyNews

September 2025

Hi there,

Here is your latest SmartyNews - a regular newsletter provided exclusively to active SmartyGrants users, through which we provide important system updates and policy notifications.

🎉 New workflow rule: change application stage based on a form response



From **September 17**, workflow gets a power boost! Users can set up a workflow to **trigger a rule based on when a single, multiple choice or smart choice response is submitted on a form**.

This can be helpful in many ways; for example, you could move applications to a specific assessment stage based on relevant data collected in an application form; you could shift all organisation-type applicants to one stage, and all individual applicants to another; you could direct applications to a specific place depending on data entered into an Administration form - there are multiple examples of important uses for this tool.

Ensure your program managers and administrators are aware of this new feature, and consider what rules you might put in place for your organisation to avoid any conflicting rules.

Learn more about managing workflow rules on our Help Hub.

SmartyTips!

A few handy tips and reminders, courtesy of our Support and Training team:

Updating your email address: Each Manage User can update their own email address under 'My Account' when logged in (no need to ask an administrator to do it for you). Here you will also find a number of other preferences that you can set for yourself across your account.

🎉 We are also very happy to announce that applicants can now update their own email address – learn how by visiting the Applicant Help Hub.

Customising report tags: There are a number of tricks you can use to format or apply rules to report tags that are not default. Recently added updates include customising date formats and limiting related grant involvement history to one contact type, e.g. only where a contact is an applicant. Visit customise tag formats in our Help Hub for more information.

Acquittals split screen view: A reminder that Manage Users can now choose to display or conceal a submitted application form alongside a submitted acquittal or variation form using the drop-down menu option 'Show Application'.



Shifting to Outcomes-Orientated Grantmaking

The IGM (Institute of Grants Management) recently released a white paper urging funders to focus less on how much money is distributed and more on the impact those dollars create.



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