SmartyGrants Annual Account Maintenance Checklist

Programs	☐	Archive programs and rounds not in use
	☐	Keep the reply-to email up-to-date
Standard Fields	☐	Archive fields and categories that are no longer in use
	☐	Download the snapshot report to review how fields are being used
Contact Fields	☐	Archive fields that are no longer in use
	☐	Download the snapshot report to review how fields are being used
Contact Types	☐	Delete types that are no longer in use
	☐	Download the snapshot report to review how types are being used
Choice Lists	☐	Archive lists that are no longer in use
	☐	Check choices are updated
	☐	Download the snapshot report to review how lists are being used
Funding	☐	Create financial periods
	☐	Create budgets and/or budget allocations
	☐	Check any program operating as a multi-year funding program has been set up in relation to financial periods that span multiple years
Users	☐	Check access levels are set up correctly
	☐	Check users that need to be removed from the account have been set to no access
General	☐	Check general content on the applicant website is up-to-date
	☐	Check new features as outlined in SmartyNews are being utilised
Tasks	☐	Delete old tasks
	☐	Deactivate old recurring templates
	☐	Reflect on any part of last year's process that could be automated through using recurring templates

Reports	☐	Download a local copy of important report templates
	☐	Tidy up and remove templates as required
Funding Overview	☐	Download the snapshot report
	☐	Check that any outstanding payments have been made
Contacts	☐	Resolve all duplicates
	☐	Consider inserting some sort of prompt in your acquittal forms or report templates asking applicants to get in touch with any changes to contact information
Bulk Action	☐	Export summary information or form responses as PDFs as required for use outside SmartyGrants
Forms	☐	Update the confirmation of submission email
	☐	Update date validation fields
	☐	Update general content in your forms
	☐	Swap out general content for reference fields where applicable
Stages	☐	Archive stages that are no longer in use
Evaluation	☐	Gather applicant feedback. What worked well? What did not?
	☐	Set up a feedback process for your programs and consider using SmartyGrants to do it. Try to make SmartyGrants a one-stop-shop for all your information needs