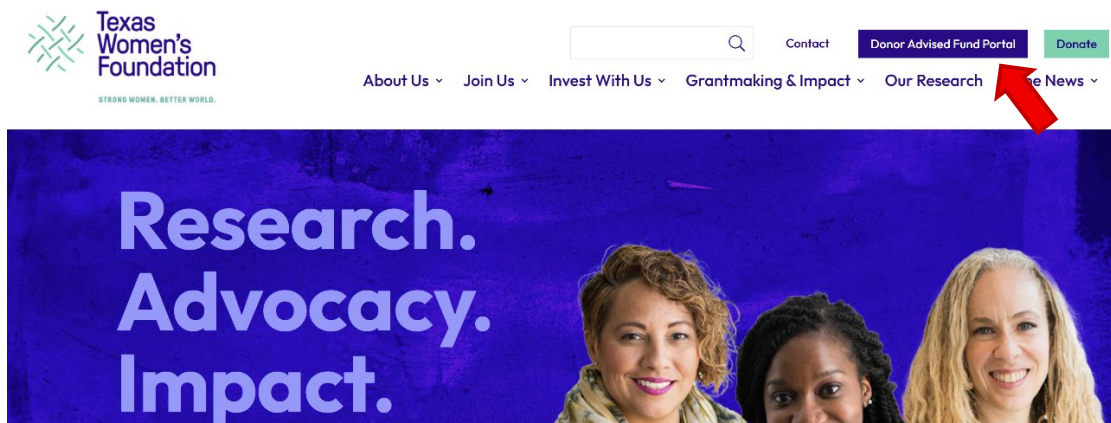


## Donor Advised Fund – Grant Recommendation Portal Walkthrough

*This step-by-step guide includes visual aids to help navigate the new grant recommendation portal. If you have any questions or need troubleshooting assistance, please contact the Mission & Grants team at [grants@txwf.org](mailto:grants@txwf.org).*

### Section 1: First-time Users

- 1) Go to the Texas Women’s Foundation website: [www.txwf.org](http://www.txwf.org)
- 2) Click on the “Donor Advised Fund Login” button in the upper right corner of the screen. See below:



- 3) This will bring you to the Donor Advised Fund Landing Page. To access the recommendation portal, click on “Begin Grant Recommendation”.

### Donor Advised Funds

Be sure to add [mail@grantsapplication.com](mailto:mail@grantsapplication.com) to your safe sender list

#### Steps for First Time Users:

1. Click "Begin Grant Recommendation" link
2. Create a userID and Password
3. Fill out the form
4. Note that Address is NOT required but helpful
5. You can save the recommendation to complete at a later date
6. You can request that TXWF Staff delete a recommendation if circumstances have changed.
7. You will receive a confirmation email from [mail@grantsapplication.com](mailto:mail@grantsapplication.com) confirming your account and a 2nd one confirming your submission.


#### What Happens after submission:

- TXWF Staff will review the recommendation, and it will go through applicable approval channels.
- You will be notified when the recommendation has been approved.
- You will be notified when the recommendation has been paid.

#### Other FAQ's

- [Click here](#)

### Start Here:

[Begin Grant Recommendation](#)

[Request Account Balance](#)

[View 2024 Fund Activity](#)

[Step-by-Step Guide](#)

[Contribute to My Donor Advised Fund](#)

- 4) If this is your first time using BlackBaud YourCause, select “Create Account” underneath the E-mail field.

*If you already have an account, please proceed to Section 2 of this walkthrough.*



## Donor Advised Fund – Grant Recommendation Portal Walkthrough

- 5) Enter your preferred e-mail address. You will receive a confirmation code from Blackbaud at [noreply@blackbaud.com](mailto:noreply@blackbaud.com) in your inbox.
- 6) Enter the code and then create a password and enter your first and last name.  
*Ensure your password fulfills the prerequisites listed and is something you can remember!*
- 7) Submit your information. The page will refresh, and you can begin your application by selecting “Start New Application”.
- 8) Enter in the name or Tax ID of the organization you wish to grant to. Click “Select” and the application will open for you.

The screenshot shows a web form titled "Select Your Organization" with a help icon in the top right corner. The form contains a text input field with the value "94-2752421" and a red "x" icon on the right. Below this field is a note: "The Registration ID is the nonprofit's official ID". Underneath is a dropdown menu currently showing "All countries" with a downward arrow. A large light purple box displays the organization details: "WOMENS FOUNDATION OF CALIFORNIA", "300 FRANK OGAWA PLAZA SUITE 420 Suite 420, OAKLAND, CA, 94612, UNITED STATES", and "94-2752421". At the bottom left, there is a link "Don't see the organization? + Add organization". At the bottom right, there are three buttons: "Back", "Go to my applications", and a dark blue "Select" button. A footer note at the very bottom states "Accepting applications until Dec 1, 9999 11:59 PM".

*If you cannot find the organization, you can click “Add organization” to add your organization.*

- 9) Fill out the form. Note that any fields with a red asterisk (\*) are required fields and must be filled out to submit. All other fields are optional.
- 10) When you have completed your application, review it to ensure the information is correct, then click ‘Submit’.



## Donor Advised Fund – Grant Recommendation Portal Walkthrough

### Section 2: Returning Users

- 1) Follow steps 1-3 from section 1 of this document.
- 2) Log in using your e-mail and password used when creating your account.
- 3) Scroll to the bottom of the page. If you have an in-progress recommendation you have not submitted, you will see a text field that reads *“You have \_ application(s) that have not been submitted. Click edit, view all my applications, or start a new application”*. See below:

**What Happens After Submission:**


- TXWF Staff will review the recommendation, and it will go through applicable approval channels.
- You will be notified when the recommendation has been approved.
- You will be notified when the recommendation has been paid.

**Other FAQ's**  
Click here

You have 1 application that has not been submitted. Click edit, view all my applications, or start a new application.

William Capper on behalf of WILLIAMSBURG STARZ GOLD Application ID: 1521264	<b>Edit</b>
--	-------------

[View all my applications](#) **Start new application**

- 4) Select the *“Edit”* button next to the appropriate application to continue working.
- 5) Select *“Start New Application”* to begin a new recommendation.
- 6) If you would like to view all your recommendations and check their status in the system, select *“View all my applications”*. You can view each recommendation and edit that have the  Draft icon next to them.

