



USER GUIDE

PROJECT MANAGEMENT SYSTEM (PMS)
OF THE SMALL GRANTS PROGRAM (SGP)
ON-LINE PLATFORM

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Acronyms

DD-MM-YYYY: conform to the following format: dd = day in two digits, mm = month in two digits, yyyy = year in four digits.

FAQ: Frequently Asked Questions

GO: Governmental Organization

IEC: International Electrotechnical Commission

ISMS: Information Security Management System

ISO: International Organization for Standardization

MAR Fund: Mesoamerican Reef Fund Inc

MPA: Marine Protected Areas

NGO: Non-Governmental Organization

PDF: Portable Document Format

PHP: Hypertext Preprocessor

PMS: Project Management System (On-line platform)

PP: Project Proposal

RfP: Request for Proposals

RRI: Reef Rescue Initiative

SGP: Small Grants Program

SSL: Secure Sockets Layer

UTC: Coordinated Universal Time

Presentation

This manual is designed as a tool to guide applicants to the Small Grants Program (SGP) of the Mesoamerican Reef Fund (MAR Fund) in using the Project Management System (PMS), the online platform for submitting Project Proposals (PP) and giving follow up during the Request for Proposals (RfP) process.

If you are interested in learning more about the SGP, please visit the following link: <https://marfund.org/en/small-grants-program/>.

This manual explains how each of the interaction screens between the user and the PMS that captures the information works, as if it were a database. Although the use of the PMS requires basic knowledge of web pages/online platforms, the instructions detailed in this manual are easy to understand.

It is important to mention that some words in the PMS, due to the type of programming and settings, are exclusively in Spanish and could not be translated into English. We apologize for this inconvenience.

Section I: Project Management System (PMS) Overview

The PMS was developed in accordance with the [ISO/IEC 27001](#) standard; an international standard for programming, databases and information management security. The PMS has [SSL Certificate \(https\)](#), which allows information to be encrypted from users' computers to the server and guarantees the security of connections and information traveling through computers. The certification requires the development and implementation of the [Information Security Management System \(ISMS\)](#), a diligent security program that defines how an organization such as [Vtiger](#) consistently manages security in a holistic and comprehensive manner.

In September 2024, the SGP was upgraded to the latest version of [Vtiger](#) from 7.1 (2018) to 8.2 (2024) and [PHP](#) from 7.4 to 8.3.

For the PMS to function properly, users must use a Google Chrome, Mozilla Firefox, Safari or Microsoft Edge browser, updated to 2024.

Once the user has logged into the PMS, they have a maximum period of inactivity of 30 minutes, after which the PMS will not respond and will be deactivated for security reasons. To return to the PMS, the user must log in again with their username and password. For this reason, we recommend that the user save the session every 10-15 minutes in order not to lose the information included.

Section II: Registration, identification and access

1. Registration page

To access the PMS of the SGP, you must complete the registration form at the following link: <https://ppd-sgp.marfund.org/forms/en/>.

The registration form is composed of three blocks of information:

a. Instructions

In this section you will find instructions on how to complete the registration form (Figure 1).



Figure 1. Instruction section of the PMS registration form.

b. Applicant information

In this section you must provide the applicant organization's information. Please note that some fields are mandatory (they are highlighted in bold in the text, while in the form they are highlighted with an asterisk (*)) and you must complete the requested information, otherwise the PMS will not allow the form to be sent (Figure 2).

The information you must provide in order to complete the registration is as follows:

- **Name of the applying organization**
- **Country of legal registration** (to be selected among: Mexico, Belize, Guatemala, Honduras, Others (specify others)).
- If in Country of legal registration, you indicated other, please specify
- **Physical address**
- **Name of the applicant**
- **Title/Position**
- **Primary Phone**
- Secondary Phone
- **Primary email**
- **Secondary email**
- Fax
- **Organization's website**
- Other ways to be contacted
- **Type of organization** (to be selected from: Non-Governmental Organization (NGO), Governmental Organization (GO), Academia, Community Organization, Other (specify other)).
- If in Type of organization you indicated other, please specify
- **Summary of your organization's mission**

APPLICANT INFORMATION

Name of the applying organization (*)

Country of legal registration (*)

If you indicated Other, please specify which country

Physical Address (*)

Name of the applicant (*)

Title/Position (*)

Primary phone (with country code) (*)

Secondary phone (with country code)

Primary email (*)

Secondary email

Fax

Organization's Website (*)

Skype Usomame

Other ways to be contacted

Type of Organization (*)

Specify other:

Summary of your organization's mission (*)

Figure 2. Applicant information section of the PMS registration form.

c. Confirmation of user data for access to the PMS

The data in this section will be filled in automatically and will correspond to the first name, surname and email address of the user who will have access to the PMS. We recommend that each organization register only once to avoid confusion. To confirm the data, please follow the instructions below:

1. Select the preferred language in which the PMS will be presented (Spanish or English).
2. Confirm the reCAPTCHA (“No soy un Robot” - “I am not a robot”).
3. Finally, click the **“Send Form”** button (Figure 3).

CONFIRMATION OF DATA OF THE USER WHO WILL HAVE ACCESS TO THE PROJECT MANAGEMENT SYSTEM OF THE SMALL GRANTS PROGRAM (SGP)

The data in this section will be automatically completed and will correspond to the name, surname, and email of the user who will have access to the system to submit the necessary documents to participate in this call.

In this section, only select your preferred language, confirm you are not a robot, and submit the registration form. If you wish to change the user data who will have access to the system, you must update the applicant information section before submitting your form.


Name and surname of the user (*) <input type="text" value="This field will be automatically completed"/>	User's email (*) <input type="text" value="This field will be automatically completed"/>
Preferred language (*) <input type="text" value="Select your language"/>	← 1
Send form	
<input type="checkbox"/> No soy un robot	↑ 3
	← 2

Figure 3. Data confirmation section of the PMS registration form. The orange arrows indicate the following: 1. Selection of preferred language, 2. reCAPTCHA button and 3. Send form button.

A pop-up window (Figure 4) will confirm your registration in the PMS. You will receive your access credentials and instructions for logging in by email. For security reasons, we recommend that you change your login credentials the first time you log in to the PMS.

Página de Bienvenida/Welcome Page

Página de Bienvenida Convocatoria de Pequeñas Donaciones Welcome Page Small Grants Program RfP



KFW



PAUL M. ANGELL
FAMILY FOUNDATION



¡Gracias por registrarse en el Sistema de Gestión de Proyectos del Programa de Pequeñas Donaciones (PPD) de MAR Fund!

En breve, recibirá un correo electrónico confirmando su registro y sus credenciales de acceso al Sistema de Gestión de Proyectos del Programa de Pequeñas Donaciones (plataforma en línea). A través de esta plataforma, podrá presentar su(s) propuesta(s) de proyecto(s) para participar en las convocatorias del Programa de Pequeñas Donaciones (PPD) de MAR Fund.

Thank you for registering to the MAR Fund Small Grants Program (SGP) project management system!

You will shortly receive an email confirming your registration and your access credentials to the Small Grants Program Project Management System (on-line platform). Through this platform, you will be able to submit your project proposal(s) to participate in the MAR Fund's Small Grants Program (SGP) Requests for Proposals.

MAR Fund is pleased to have the participation of organizations and entities interested in the conservation of the Mesoamerican Reef System.

To learn more about how to access, navigate and use the online platform, click on this [link](#).

Figure 4. PMS welcome and registration confirmation pop-up window.

2. PMS login

- The link to access the PMS is as follows: <https://ppd-sgp.marfund.org/> (Figure 5).
- Enter the user (email) and password received by email.

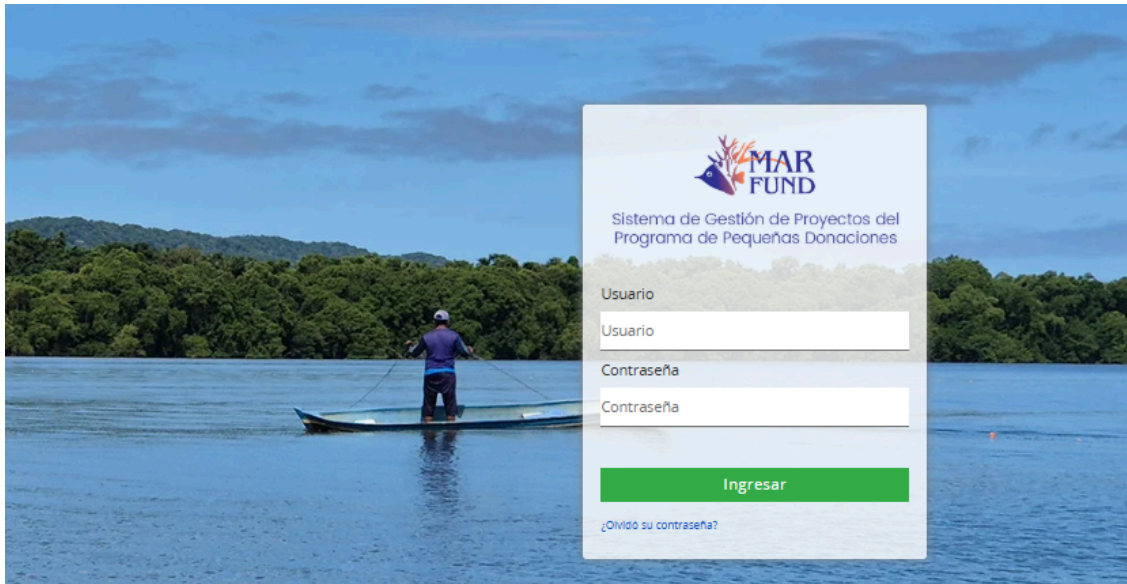


Figure 5. PMS login page. Enter your username and password.

Select your preferences in the pop-up window that will appear once you log in to the PMS (Figure 6). All fields are mandatory.

¡Ya casi!

Preferences(Todos los campos siguientes son obligatorios)

ES Mexico ← 1

(UTC) Tiempo universal coordin... ← 2

dd-mm-yyyy ← 3

Figure 6. Preferences pop-up window. The orange arrows indicate the following: 1. Language, 2. Time zone and 3. Date format.

Section III: PMS

1. Home screen

In the PMS home screen (Figure 7) you will be able to visualize:

- 1) **Main Menu:** through the main menu you will be able to enter PROJECTS and Documents.
- 2) **PROJECTS:** through the PROJECTS option you will be able to enter the Projects Module and the Organizations Module.
- 3) **Projects Module:** in the Projects/Proposals Module, you will find the list of submitted PP and approved projects. At the beginning (first entry), you will not find PP or projects visible as they have not yet been submitted.
- 4) **Organizations Module:** shows the applicant organization's data.
- 5) **Documents:** show all documents uploaded by the applicant organization.
- 6) **User Guide:** allows access to the support page to view the RfP Frequently Asked Questions (FAQ) about the RfP, download the user guide and view the video tutorials.
- 7) **My preferences:** allows you to view and change the data registered as an applicant, as well as your password and language of the PMS. You can include a photo of the user or the institution's logo, set the currency (it is recommended to leave it in US\$) and update the main contact information, address, country, etc. To modify the information, click the "Edit" button and remember to "Save" once the data has been updated. This information can be modified at any time. It is important to check that your personal data is correct and, if necessary, include additional information. It is recommended to keep your data up to date so that you can receive notifications from the PMS.
- 8) **Sign out:** you can log off from the PMS by clicking on the "Sign out" button.

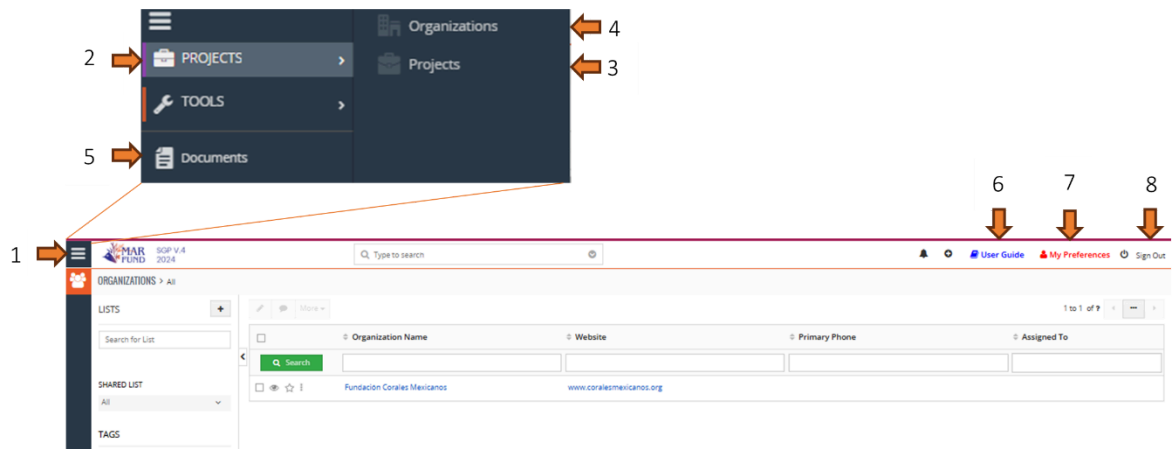


Figure 7. PMS home screen. The orange arrows indicate the following: 1. Main menu, 2. PROJECTS, 3. Projects module, 4. Organizations module, 5. Documents, 6. User guide, 7. My preferences and 8. Sign out.

2. Changing your password

It is recommended that you change your password to maintain the security of your account. If you wish to change your password (Figure 8), you must follow these steps:

1. Click the “My Preferences” button in the upper right corner of the PMS (highlighted in red/orange).
2. Select “My Preferences” again from the drop-down menu.
3. In the upper right corner, click the “More” button, select the “Change Password” option and follow the instructions provided there.

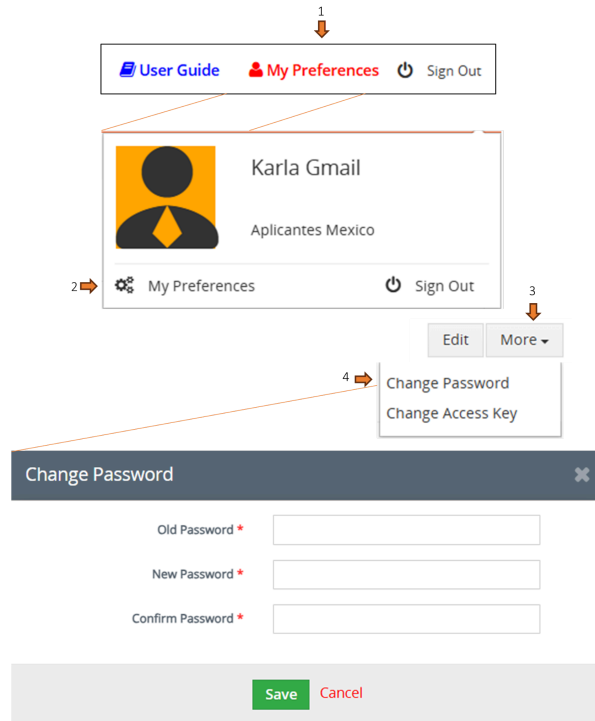


Figure 8. Password change. The orange arrows indicate the following: 1. “My Preferences” section, 2. “My Preferences” pop-up window, 3. “More” button of the “My Preferences” menu and 4. Select “Change password”.

If you have forgotten your password to access the PMS, click on the button that says “¿Olvido su contraseña? (Forgot your password?)” (Figure 9), where you will be asked for your username (email address). Follow the instructions and an email will automatically be sent to you with a link to create a new password. Please note that this request expires in one hour, so it is recommended that you keep an eye on your email.

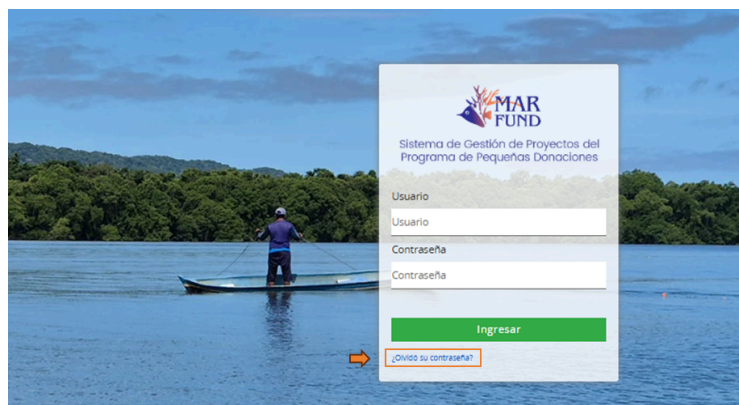


Figure 9. PMS login page. “¿Olvido su contraseña? (Forgot your password?)”

Section IV: Organizations Module

When registering your organization, it is important to check that all the information is correct and, if necessary, includes additional information. To access your registration information, select the Organizations Module and click on your organization's name, as shown in Figure 10.

The “Summary” option shows a summary of your registration, with some key information about the organization (such as the organization's name, email address and contact person's phone number), the latest documents uploaded by the organization and recent notifications/comments for your information.

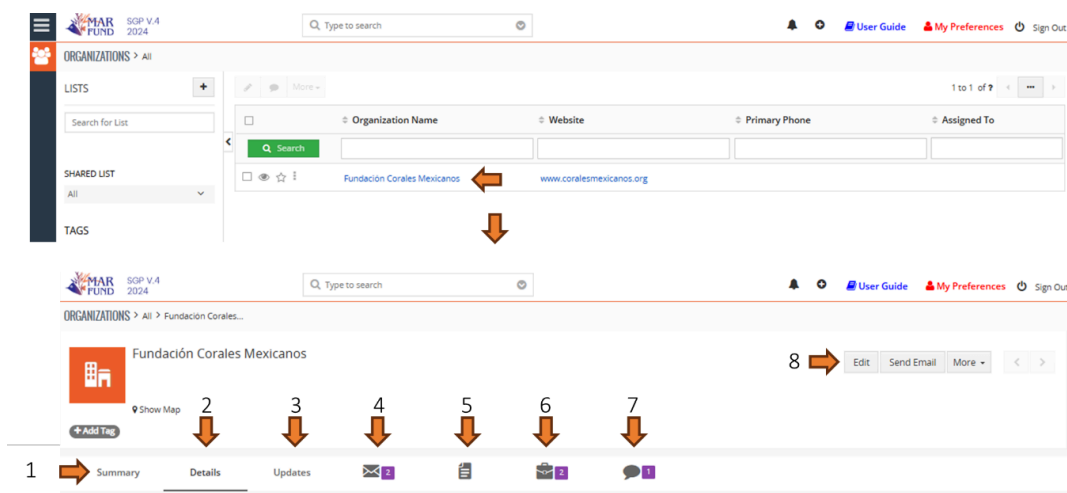


Figure 10. View of the Organizations Module, general (top) and specific (bottom). The orange arrows indicate the following: 1. Organization Summary, 2. Organization Details, 3. Updates, 4. Emails, 5. Organization document, 6. Projects, 7. Organization comments, and 8. Edit.

In this module, you can review your organization's data (Figure 11). You can adjust at any time using the “Edit” option (Figure 12) as explained below. You can also access emails sent to you by the PMS, upload relevant documents from the same organization, create one or more PPs, and respond or send comments, as explained in the following sections.

In the Organization Module, you can find and perform the following actions:

1. Details

Once you have accessed your organization, you can review its information in the “Details” section.

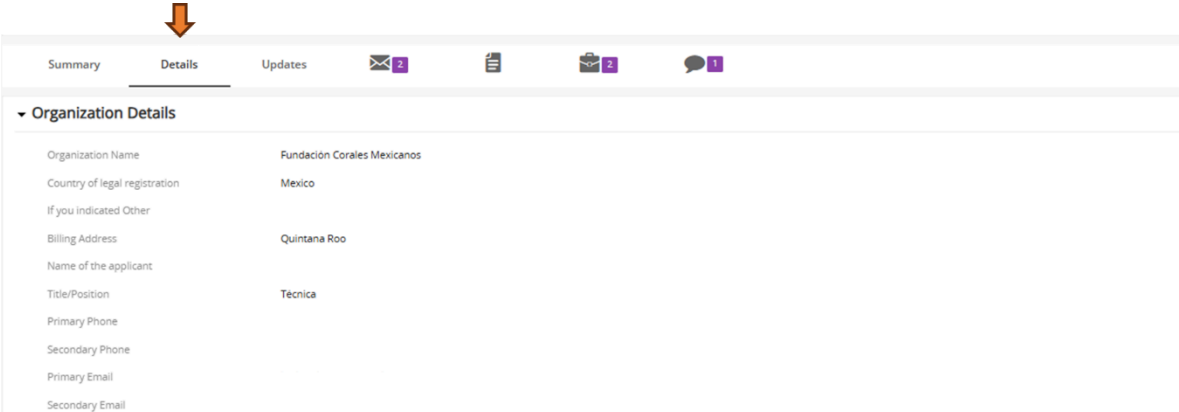


Figure 11. “Details” section. Organizations Module.

2. Edit

In this mode, you can edit your organization's information at any time (Figure 12).

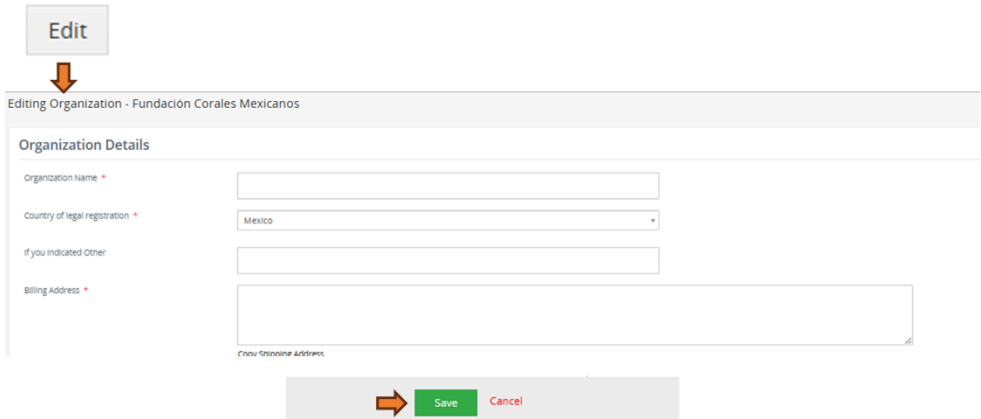

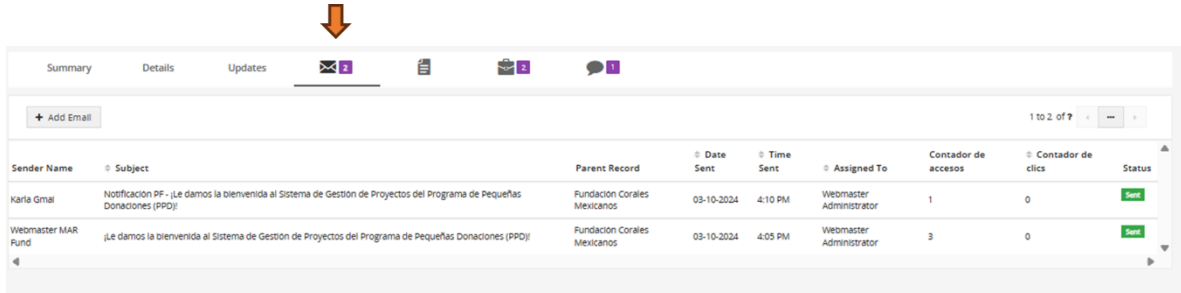


Figure 12. “Edit” section. Organizations Module.

3. Email

In this section () you will see the same sequence of emails that you will also receive at the email address provided as an applicant (Figure 13).




Sender Name	Subject	Parent Record	Date Sent	Time Sent	Assigned To	Contador de accesos	Contador de clics	Status
Karla Gmail	Notificación PF - ¡Le damos la bienvenida al Sistema de Gestión de Proyectos del Programa de Pequeñas Donaciones (PPD)!	Fundación Corales Mexicanos	03-10-2024	4:10 PM	Webmaster Administrator	1	0	Sent
Webmaster MAR Fund	¡Le damos la bienvenida al Sistema de Gestión de Proyectos del Programa de Pequeñas Donaciones (PPD)!	Fundación Corales Mexicanos	03-10-2024	4:05 PM	Webmaster Administrator	3	0	Sent

Figure 13. Email. Organizations Module.

It is important to mention that if you have not received any emails in the application you normally use on a daily basis, such as Gmail or Outlook, but you do see emails in the PMS, you should check your Gmail/Outlook SPAM folder and change the settings so that you can receive automatic emails from the PMS. Throughout the application process, you will be able to reply to any mail through the PMS or the application you normally use.

4. Documents

In this section () you can upload the required Due Diligence attachments and documents related exclusively to your organization, such as the list of board members, legal representative appointment, incorporation documents and bylaws of the organization, annual reports, external audit reports, financial statements, certificate of legal registration, certificates of good standing. These documents can be updated annually. Do not upload documents specific to the PPs submitted to avoid confusion, as these should be shared in the Documents section of the Project Module.

To upload your organization's documents, follow these steps (Figure 14):

- a) Click the “+New Document” button.
- b) Select “To repository PPD/SGP” to upload a document no larger than 10MB.

If the document cannot be uploaded directly to the PMS due to its size (greater than 10MB), it is possible to share a link.

To do this, select “From file URL” and copy and paste the link to provide access. Remember to enable the sharing option to view and, possibly, download the file. Follow the other instructions to name the file and place it in the appropriate folder.

- c) Drag or select the file you want to upload to the PMS from your computer.
- d) Under “Title”, enter the name of the file.
- e) In the folder name, select the “Default” option from the drop-down menu or the RfP to which you are submitting your PP (ej. For 2024, choose “Convocatoria 2024” (Request for Proposals 2024).
- f) In "Note", you can add notes or observations, if necessary.
- g) Click “Upload” to save your document in the PMS.
- h) Verify that the uploaded documents appear at the bottom of the section. From there, you will be able to preview them (JPG and PDF formats) and download them if necessary.
- i) If you have uploaded an incorrect document, there is an option to delete the document. Select the document you want to delete and look for the “Delete Document” option in the “More” button at the top right of the PMS.

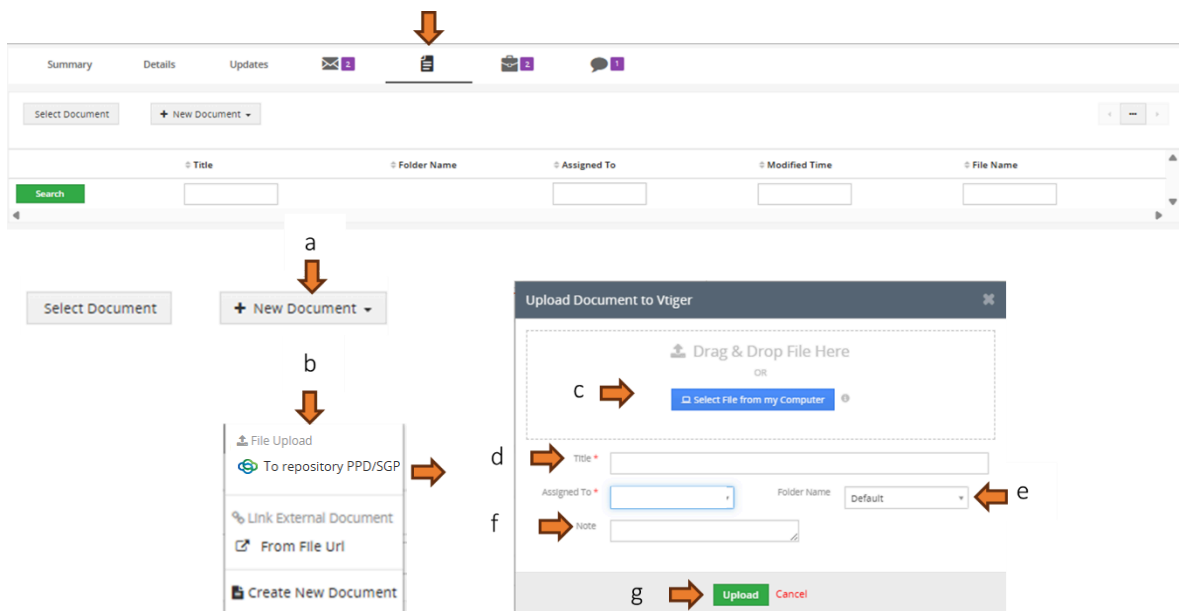



Figure 14. “Documents” section. Organizations module. Indications for uploading documents to the PMS. The orange arrows indicate the following: a) Selection of “+New document”, b) Option to upload documents from the computer to the PMS, c) Window to select the document to upload to the PMS, d) “Title” section, e) Folder selection section, f) ‘Notes’ section and g) “Upload” button.

When uploading your documents, follow the instructions in Appendix B of Due Diligence, as follows: use the numbering (#) and file name from the list to identify and upload the documents in an orderly and complete manner. If you have more than one document for the same number, use letters to identify them, for example: 8a_AuditReport_2022, 8b_AuditReport_2023. Documents that are not numbered in this way will not be accepted and your PP will be considered incomplete.

When reviewing your PP, if you receive a request for changes or updates to a document, upload the corrected document with the original name and add the word 'Updated' and the date of the update without deleting the previous version. For example: "8b_AuditReport_2023_Updated_15-12-2024.xls".

5. Projects

In this section () you will be able to create your Project Proposal (PP). The applicant must create a new PP by clicking on the Projects icon within the Organization Module. This will display the Projects Module with the option to select the "+ Add Project" icon (Figure 15).

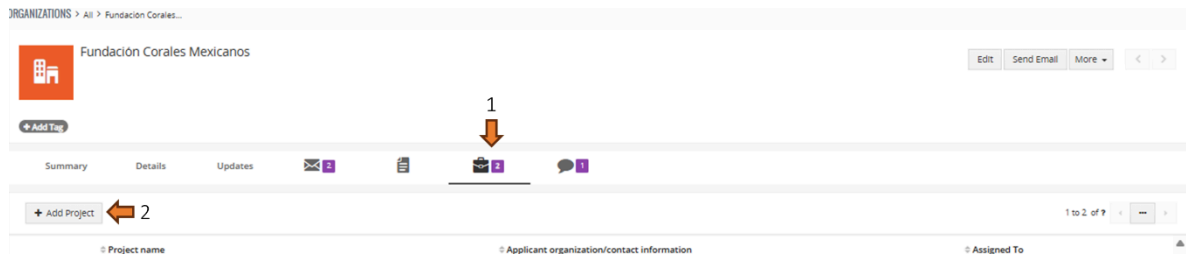


Figure 15. Section "Projects": Organizations Module. Creation of a new PP. The orange arrows indicate the following: 1. Selecting the Projects icon and 2 +Add project icon.

Selecting "+ Add Project" will directly display the online Proposal Form. To create a new PP complete at least the following fields:

- **Financial Window:** select the financial window by choosing between a) the Traditional Small Grants Program Window ("Traditional") or b) the Reef Rescue Initiative (RRI) Window.
- **Project Name:** manually include the project name/title, which you can modify later, if necessary.

- **Applicant Organization:** verify that your organization is selected (this will be filled in automatically but verify it) so that the PP correctly relates to your organization and applicant user (Figure 16). If the field is empty, select your organization.

PROJECTS > All > Editing: Restaurac...

1 → SECTION I: PROJECT SUMMARY

Financial Window

Financial Windows *

SGP Reef Rescue Initiative

Select an Option

Traditional SGP

SGP Reef Rescue Initiative

2 → Project name

Project name *

Maximum of 100 characters, including spaces.
If it is a continuation, please use the same title from the previous project and include the number of the phase you are at (I, II, III, IV, etc.)

3 → Applicant Organization/Contact Information

Applicant organization/contact information


Type to see


Figure 16. Section “Projects”. Organizations Module. Creation of a new PP. The orange arrows indicate the following: 1. Selection of the Financial Window, 2 Name of the project and 3. Applicant Organization.

You can continue to complete your PP by following the fields in the online Proposal Form or simply save the information to continue later by selecting the “Save” option. The generated project will appear in the Projects Module, and when selected, the “Edit” option will be enabled. A purple box with numbering next to the icon will indicate the number of projects attributed to your organization. For more information on submitting the PP and filling out the online Proposal Form, please refer to **Sections V and VI** of this manual.

The “+ Add Project” option will be active only as long as the SGP RfP is active, as it is disabled when there is no open RfP. However, you will be able to view PP and/or projects submitted in previous RfP.

6. Comments

In this section () you will receive the necessary comments and instructions from the MAR Fund SGP team for your attention. In the same way, you will be able to respond or leave comments as you see fit at any time (Figure 17).

A purple box with numbering next to the icon () will inform you if you have received a comment. Check to see if you have any pending comments to address.

The following are the fields you may find in this section:

- a) Area to write your comment.
- b) “Post” button to upload the comment to the PMS.
- c) Section where comments are displayed.

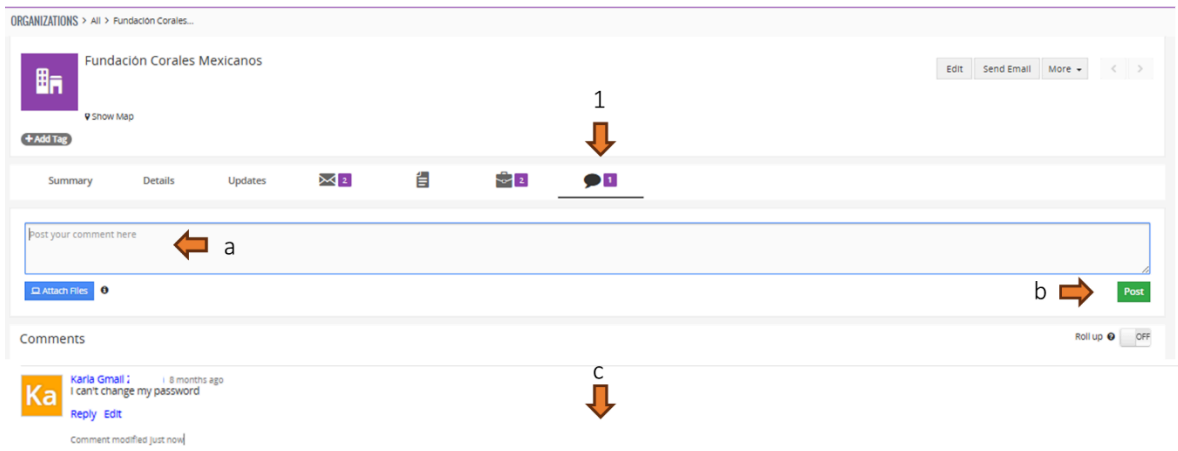


Figure 17. “Comments” section. Module Organizations. The orange arrows indicate: Comments section, a) Area to write comments, b) “Post” button to upload comments and c. Section where comments are displayed.

Section V: Project Module

The Projects Module is very similar to the Organizations Module. However, in this module you will find everything related to PPs (Figure 18). In this module you can submit one or more PPs to one or more available financial windows. Also, from this module you will be able to upload the required attachments and documents specific to the PP. If the MAR Fund SGP team requests changes or adjustments during the PP application and review process, you will need to make them in this module. You will receive notifications about your PP and will be able to respond to comments, if necessary, as explained in the following sections.

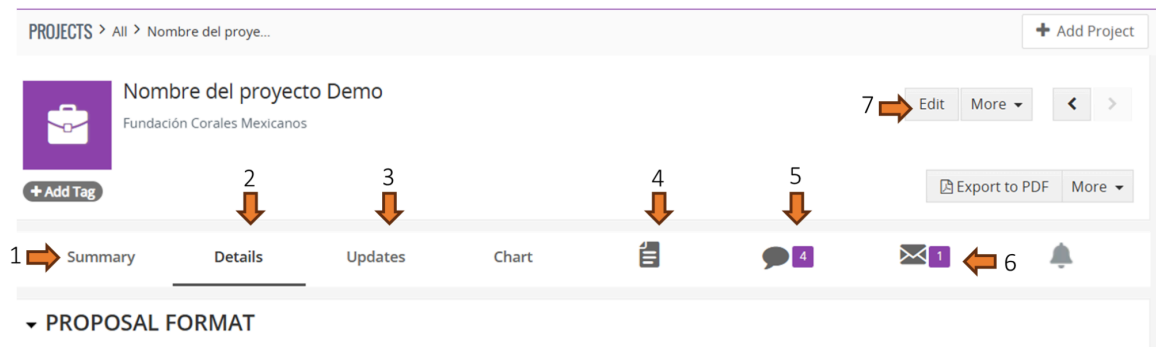


Figure 18. Project Module View, 1. PP summary, 2. PP details, 3. PP updates, 4. PP documents, 5. PP comments, 6. email inbox and 7. "Edit".

In the Projects Module, by selecting one of the PP, you will be able to find and perform the following actions:

1. Summary

The Summary option displays a summary of your PP, key fields (such as project title and contact person), last uploaded documents and recent notifications/comments for your information (Figure 19).

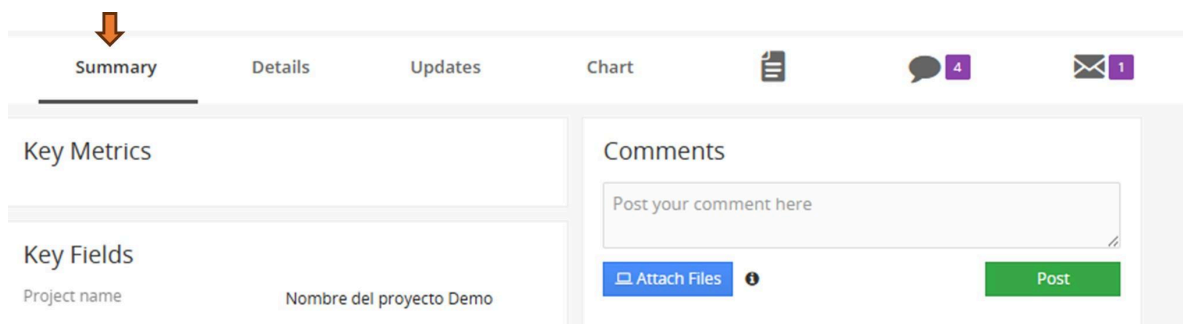


Figure 19. "Summary" section. Projects Module.

2. Details

Once you have created a new PP, you can review its information in the “Details” section (Figure 20).

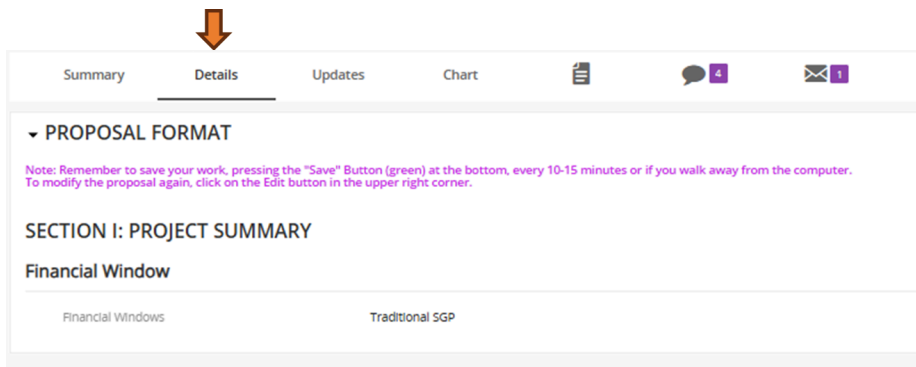


Figure 20. “Details” section. Projects Module.

3. Updates

In this section you can review the latest actions performed in the PMS (Figure 21).

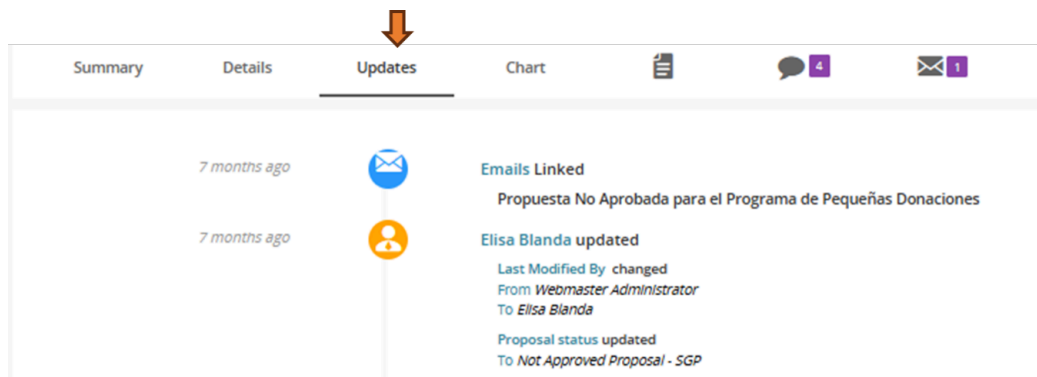



Figure 21. “Updates” section. Projects Module.

4. Documents

In this section () you can upload the required Due Diligence attachments and documents related exclusively to your PP, such as the co-management agreements, the permits to work in the Marine Protected Area (MPA), the team that will participate in the project, the map of the area where the project will be developed, the Environmental and Social Screening Questionnaire (Appendix C), the completed and signed Due Diligence Appendix B, the project video, the Project Development Table and the Project Budget Table, among others. This is because each project has its specific documents, which may vary from project to project and from year to year.

If you have not yet uploaded your organization's Due Diligence documents in the Organization Documents section, you can also do so in this section.

To upload your PP documents, follow the same steps as presented above. However, make sure you are in the PP Documents section, Projects Module (Figure 22).

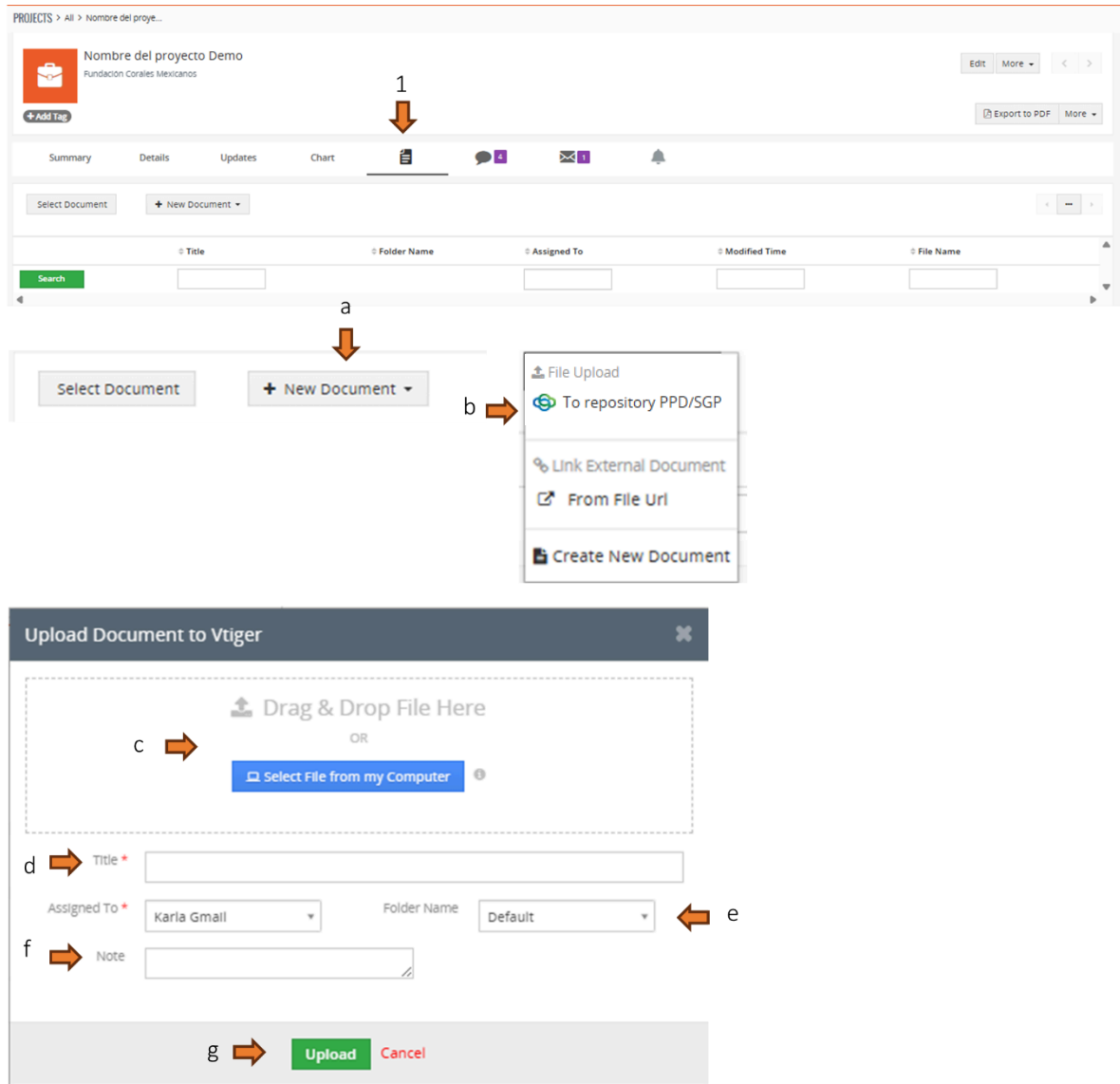




Figure 22. Section “Documents”. Projects Module. Indications to upload documents to the SGP. The orange arrows indicate the following: a) Selection of “+New Document”, b) Option to upload documents from the computer to the PMS, c) Window to select the document to upload to the PMS, d) “Title” section, e) Folder selection section, f) ‘Note’ section and g) “Upload” button.

5. Comments

In this section () you will receive the necessary comments and instructions from the MAR Fund SGP team for your attention. In the same way, you will be able to respond or leave comments as you see fit at any time. In **Section IV**, comments, you will be able to see the details of the fields (Area to write your comment, “Post” button to upload the comment to the PMS and Section where comments are displayed) and how to use them, as in Figure 23.

A purple box with numbering next to the icon () will inform you if you have received a comment. You will receive comments each time the SGP team reviews your PP. We will automatically send an email to your inbox for you to review the comments section, follow the instructions, and address the feedback by the indicated dates.

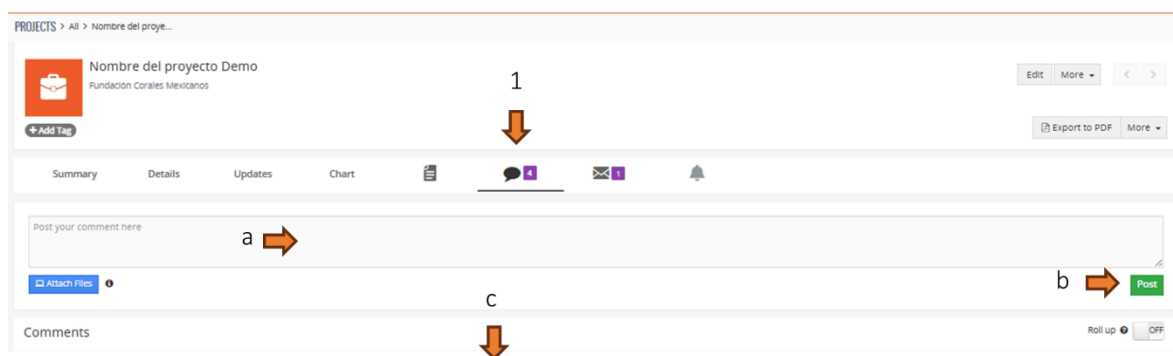



Figure 23. “Comments” section. Module Projects. The orange arrows indicate: “Comments” section, a) Area to write comments, b) “Post” button to upload comments and c) Section where comments are displayed.

6. Email inbox

In this section () you will observe the same sequence of emails that you will also receive in your email address provided as an applicant, as a backup. These emails are related to the PP in question. Each PP has its own specific emails so that the user can be notified at all stages of the PP review process.

It is important to mention that if you have not received any emails in the application you usually use on a daily basis, such as Gmail or Outlook, but you do see emails in the PMS, you should check your Gmail/Outlook SPAM folder and change your settings so that you can receive automatic emails from the PMS. Throughout the application process, you can reply to any email through the PMS or the application you usually use.

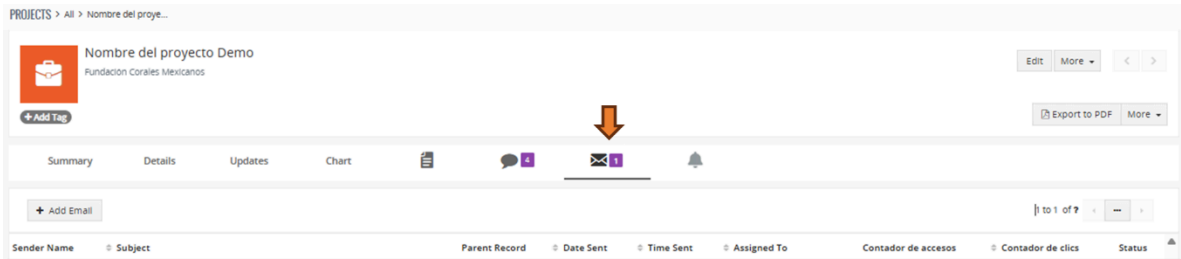


Figure 24. Email inbox. Projects Module

Constantly check your inbox and the PMS to ensure receipt of comments or requests that need to be addressed.

7. Edit

Using this mode, you can edit the information in the online Proposal Form (Figure 25).

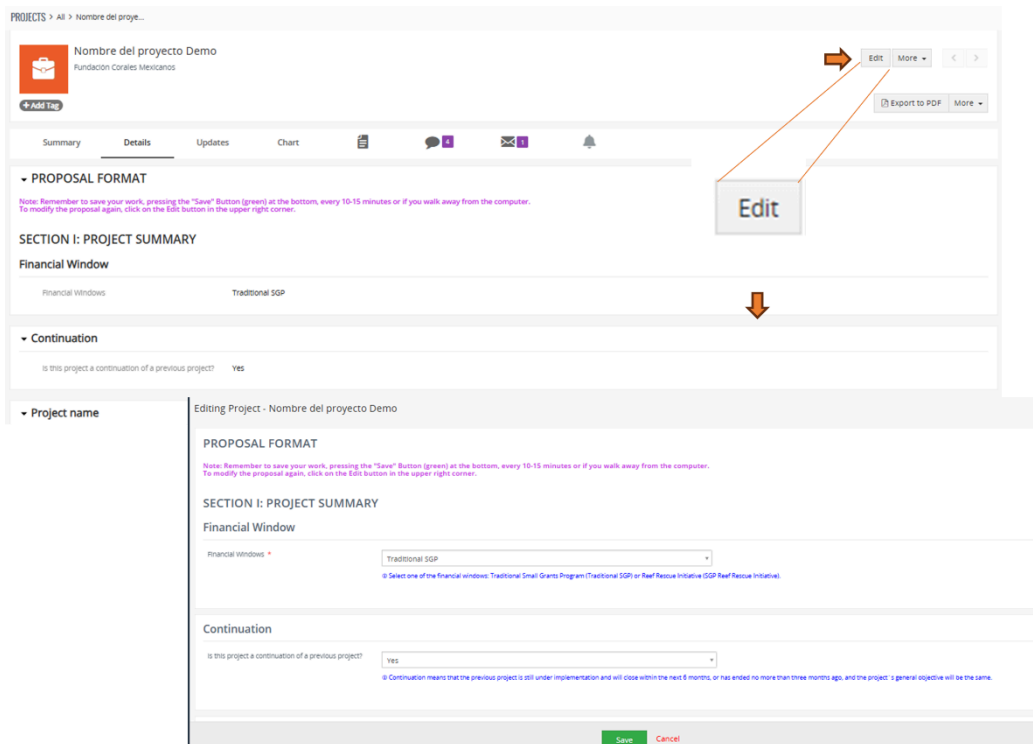


Figure 25. PP editing mode.

Section VI: Submission of Project Proposals (PP)

1. Online Proposal Format

The Online Proposal Format is the most relevant section of the RfP process. Instructions for the preparation of the PP are provided at the beginning of the document and are outlined below:

- a. Before completing the PP, please read the eligibility criteria and objectives of the RfP, which can be found at this link <https://marfund.org/en/request-for-proposals-2025/> to verify that your project meets the requirement for funding.
- b. Please note that, in order to create and save the PP in the PMS in its initial stage, it is not necessary to have complete and detailed information for Sections I and II of the online Proposal Form. However, it is recommended to include the following information: 1) Financial Window (choosing between the two available options, a) “Traditional” or b) RRI; 2) Project Name/Title; and 3) Applicant Organization. With this minimum information you will be able to save the new PP and continue updating all the information as you progress in its formulation and submission, prior to the deadline for submitting PPs.
- c. Please note that the complete PP, with its required attachments, must be submitted for review. Incomplete PPs will be discarded.
- d. PPs may be submitted in English or Spanish.
- e. PPs must be submitted no later than 11:59 p.m. local time in each country by the established deadline date. The deadline is the date by which the PP must be received (not sent). PPs received after that date will be discarded.
- f. To create a PP, the user will select “+ Add Project” (as previously indicated in Figures 15 and 16, in **Section V**). The same procedure must be repeated to submit more than one proposal. If the creation of a new PP was successful, it will appear on the screen as shown in Figure 26.
- g. Click on the PP and continue to complete/edit/modify the information as many times as needed, until you feel you are ready to submit your PP definitively for review by the MAR Fund SGP team.

	Project name	Applicant organization/contact information	Assigned To	Proposal status	Financial Windows	Category 1
<input type="checkbox"/>	Restauracion de corales en Puerto Morelos	Fundacion Corales Mexicanos	Karia Gmail		SGP Reef Rescue Initiative	Climate Change

Figure 26. Display screen of the current PP.

2. Online completion of the Proposal Form

You will be able to work on your PP on your computer using the Word guide of the Proposal Format shared in the RfP and copy and paste the text directly into the PMS. You will also be able to complete each section directly in the PMS.

Please note that the RfP and formats may vary from year to year. Be sure to download the most current versions.

The online Proposal Form consists of two sections and 18 items. Below you will find each of the items you must complete to submit your PP:

SECTION I: Project summary (Section 1-10) (Figure 27)

1. Financial Windows
2. Continuation
3. Project name
4. Project location
5. Applicant Organization (this will be filled in automatically, but verify it)
6. Direct and indirect beneficiary target groups
7. Project summary
8. Project topic
9. Project duration
10. Estimated project cost in US\$

• PROPOSAL FORMAT

Note: Remember to save your work, pressing the "Save" Button (green) at the bottom, every 10-15 minutes or if you walk away from the computer. To modify the proposal again, click on the Edit button in the upper right corner.

SECTION I: PROJECT SUMMARY

- 1 Financial Window
- 2 • Continuation
- 3 • Project name
- 4 • Project location
- 5 • Applicant Organization/Contact Information
- 6 • Direct and Indirect Beneficiary target groups
- 7 • Project summary
- 8 • Project topic

Indicate the project category(ies)-selecting a maximum of three in order of priority- choosing between: Fisheries, MPA & management, Local Communities, Ecosystems, Economic/Development Planning, Policy, Solid Waste & Sewage, Outreach & Education, Restoration, Climate Change, Others. Specify others.

[Link: \(Project category definition\)](#)
- 9 • Project duration
- 10 • Estimated cost of project in US\$

Figure 27. Section I of the online Proposal Form, with each of the sections to be completed.

SECTION II: Project Description (Section 11-18) (Figure 28)

11. Introduction and justification
12. Additional Information
13. Project development table (Annex 1)
14. Collaborations and Third parties
15. Project sustainability
16. Project budget (Annex 3)
17. Bibliography
18. Documents Requested

▶ SECTION II: PROJECT DESCRIPTION

If your project is a continuation of an active project, please use the same information you used for the previous proposal and indicate if there are any important changes included in this new proposal.

11 Introduction and Justification

12 ▶ Additional information

13 ▶ Project Development Table

14 ▶ Collaborations and Third parties

15 ▶ Project Sustainability

16 ▶ Project budget

17 ▶ Bibliography

18 ▶ Documents requested

*Please review, complete and upload the signed Appendix B in the Documents area of this proposal with the other required documents.
When you have completed the action, check the box selecting only the documents that have been uploaded for this RFP. All fields are of the Check List type.
If your organization has previously applied to MAR Fund and submitted any of the above documents, you do not need to submit them again.
MAR Fund may require additional information during the review process.*

Figure 28. Section II of the online Proposal Form, with each of the sections to be completed.

Each section provides instructions on what is required and a field to develop the topic of the different sections. If you need additional information, please refer to the Word guide on the RfP Proposal Format.

Each field is activated by clicking on each of the sections and has a magnifying effect on the required information for the user's convenience when typing. To enlarge the field, place the cursor in the lower right corner of the field and use the left mouse button to move the cursor down while holding it until it reaches the desired size (Figure 29).

Project location

Project location

Total caracteres : 14/1000

Figure 29. Area within text fields to shrink or expand the field

Note that some fields have a character limit. This is indicated in the text of the instructions. Once the limit is reached, no more text can be entered. These fields have a character counter; in some of them it is automatic, in others you will see it updated each time the information is saved.

The number of characters may vary from the Word document. The PMS may record a higher or lower number due to special, invisible and hidden characters that may arise when copying and pasting text. To keep an accurate record of characters, it is recommended to use the following link: <https://www.contarcaracteres.com/>.

To save your progress, it is essential that you click on the green button labeled “Save”, which remains at the bottom of the screen while editing (Figure 30).

Complementary information for the proposal

The proposal cannot exceed 10 pages, excluding annexes.
For projects developed in protected areas by organizations that are not approved co-administrators it is advisable to present an endorsement letter.
This requirement will depend on the activity and the country's legislation.
If the project involves more than one country, requirements must be fulfilled for each country independently, and each governmental institution will be informed by the grantee that the project will involve multi-national work.

Final proposal submission

To submit your final proposal please select the option "Submit proposal" and click "Save". Once you do this your proposal will be sent and you will no longer be able to do any modification to it.

Proposal status




Figure 30. “Save” Bottom.

The PMS will remind you to save your progress from time to time in order not to lose the information. The reminders are automatically hidden after five seconds. If you wish to close it, just click the symbol (x) in the upper right corner of the notification and click the “Save” button (Figure 31).

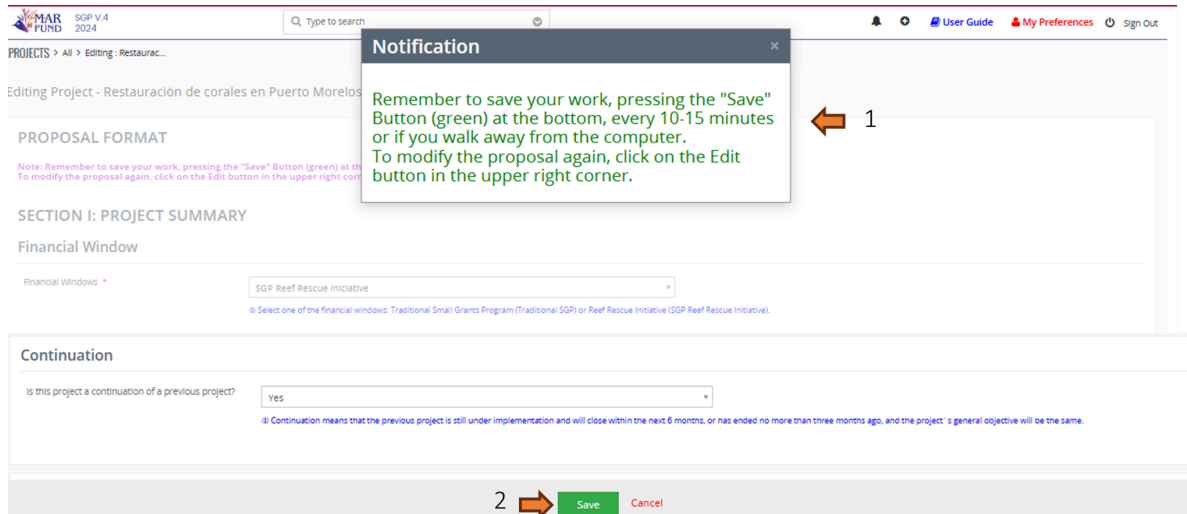


Figure 31. Pop-up reminder to save the progress of the Proposal Form. Orange arrows indicate: 1. (x) to close the reminder and 2. “Save” button.

To continue entering the information, you will need to return to the edit mode. You will have a button in the upper right corner of the screen labeled “Edit” which you must click to add or modify the information requested on the PP form. Complete the information requested in sections I and II and upload the required documents. You will be able to enter and modify your PP information as many times as you need to do so until you formally submit the PP.

Remember that the user has a maximum inactivity period of 30 minutes, so consistently save your session (e.g. every 10 or 15 min) to avoid losing the information you have entered. This is important, especially if you are away from the computer or if there are power outages. To return to the PMS, you will need to log back into the PMS (<https://ppd-sgp.marfund.org/>) with your username and password.

When you log in to the PMS, select the PP you wish to modify and continue to complete/edit/modify the information as many times as you need to, until you feel you are ready to submit your PP for final review by the MAR Fund SGP team.

3. Submitting the Project Proposal (PP)

Once you have completed and saved all required fields in the PP format, uploaded to the PMS the annexes, required documents and supplementary documents you deem necessary in the Documents section of the Projects Module - including the Project Development Table, Project Budget Table and Appendices B and C and required documents - your PP is ready to be submitted to MAR Fund.

To notify MAR Fund that your PP can move to the review stage, you will need to change the status of your PP in the drop-down menu and select the “Send Proposal” option (Figure 32). Please note that once you have done this, you will not be able to modify your PP again.

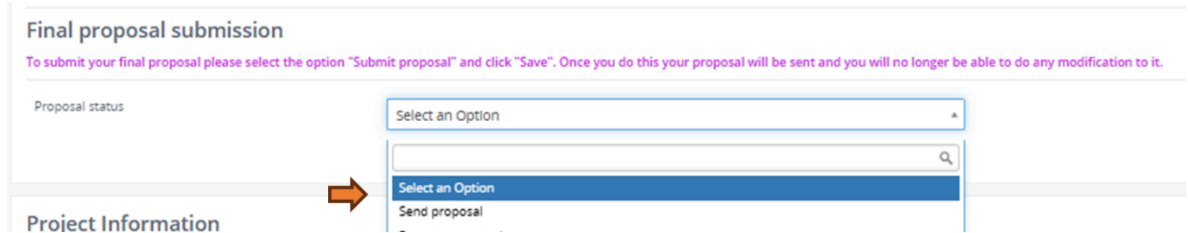


Figure 32. Proposal Status Section. Send proposal.

Once you have clicked the “Save” button after selecting the “Send Proposal” option, your PP can no longer be modified. The MAR Fund SGP team will be automatically notified and will begin the review. The PMS will automatically notify you that your PP has been submitted successfully.

During the review process you will be able to check its status in this section:

- a) Under MAR Fund review: this status will be presented once you have submitted your PP and it is under review and evaluation by the MAR Fund SGP team. It is the first review filter.
- b) In Applicant Review: this status will be displayed when the PP requires edits requested by the MAR Fund SGP team. Once these edits have been attended to, the PP should be resent in the same way as described above, by selecting “Send proposal” again.
- c) RECOMMENDED Proposal: this is the second filter. Your PP was reviewed by the MAR Fund SGP Proposal Evaluation Committee (an external committee of experts from the region). You will receive, via email, a letter with this information informing you of the next steps in the review process of your PP.
- d) APPROVED Proposal: this is the third filter. Your PP has been reviewed and approved by the MAR Fund Board of Directors. You will receive, via email, a letter with this information informing you of the next steps for the review and signing of the grant agreement.

- e) Proposal NOT APPROVED: this may occur during the first, second or third screening. The review process ends, and you will receive, via email, a letter with this information and suggestions if you wish to reapply to the SGP RfP in the future.

You will receive an email notification and instructions at all stages of the process to modify and resubmit your PP. Constantly check your inbox and the PMS to ensure receipt of comments or requests that need to be addressed.

4. Export to PDF

Below the “Edit” button, you will find the button to download the PP template in PDF format (“Export to PDF”) (Figure 33). You can download it at any time during the preparation of the PP. To do so, click the button and a box with two options will appear. In the first option, select the template you want to download, either in English or Spanish. In the second option, confirm the language in which you want to download the template. It is recommended to select the language used when writing the PP.

When you make the two selections, the following buttons will be activated:

- “Download file”: download the file directly to the computer.
- “Preview”: preview the PDF document.
- “Send Email”: send the PDF document to an email address.
- “Save into Documents”: save the PDF in the Documents section of the PMS.
- “Cancel”.

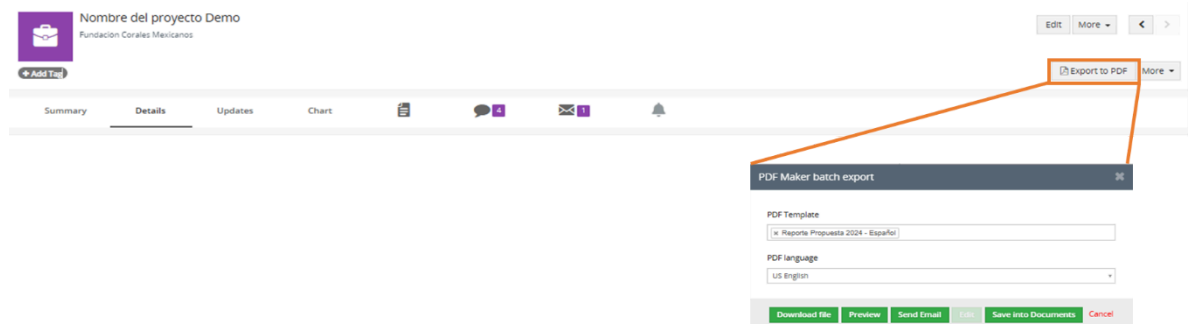


Figure 33. Export PDF; PP format.

Section VII: Support and user service

A FAQ and video tutorials section can be found on the RfP support page at the following address: <https://marfund.org/en/support-proposal/>

If there are additional questions during the PP submission and editing process, including PMS technical support, you should contact Elisa Blanda, MAR Fund Small Grants Program Officer, at the following email: eblanda@marfund.org. We will respond to your inquiries as soon as possible, with an estimated response time of up to 72 hours.