# Create a request

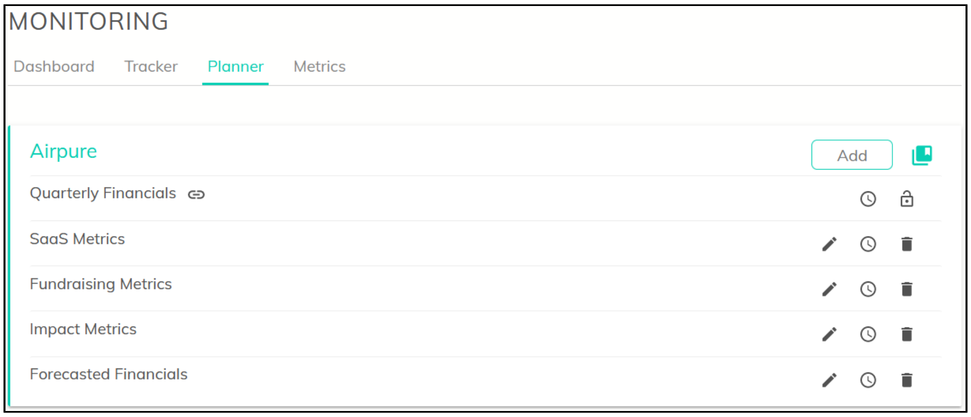
To request your portfolio companies to submit their metrics, follow this guide.

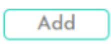
What is a request?

A 'request' is a task assigned to your portfolio company. In Fundwave, you can create requests to ask your portfolio companies to submit metrics or files to your datarooms.

## Step-by-step guide

1. Select 'Monitoring' on the left menu and go to 'Planner' on the top-menu.




2. Press 

corresponding to the asset you want to create a request for.

    a. **Title**: Name of the request.

    b. **What's this about?**: Description of the request.

    Hit 'Next'.

3. **Select Metrics**. Select the metrics you want to collect

    a. **Scenario**: You can request data in multiple scenarios. By default you should see options 'actual' or 'forecasted'.

    b. **Period Type**: Select the period for which you want the data. For example, you may want weekly, monthly, quarterly or yearly data.

    c. **Add Metrics**: To create and add new metrics

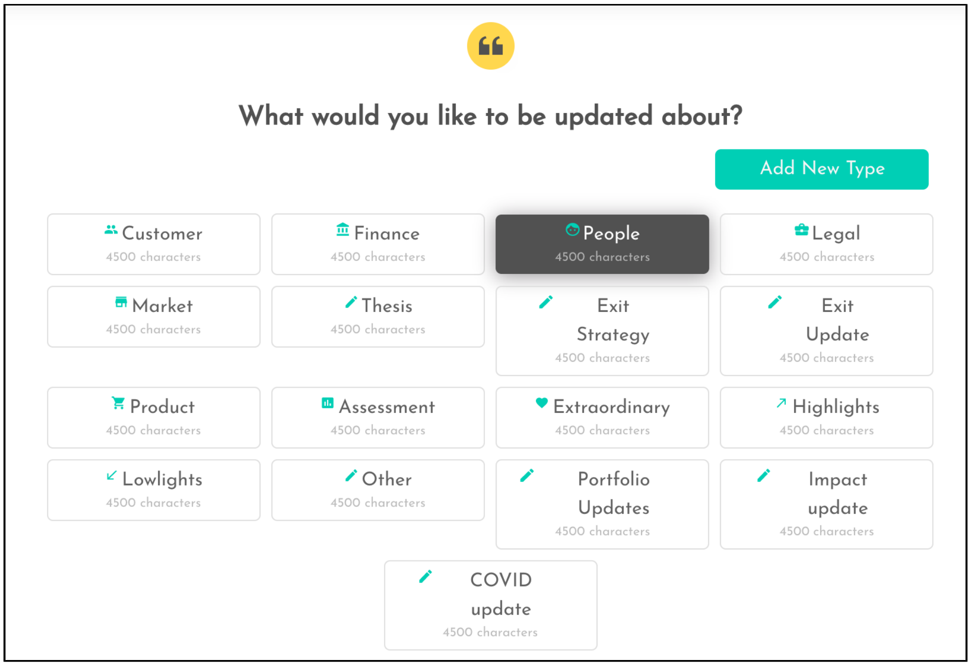
4. **Select Categories.** Select the categories you want to collect.

    **Add new category:** Create a custom category you want to request metrics for (eg: you might want to request revenue metrics by subsidiaries, region and so on). Hit Enter to save.

    **Add new category type:** Create a custom category type for a category (eg: say the portfolio company operates in multiple regions - USA and Israel). Hit Enter to save.

    Hit 'Next'.

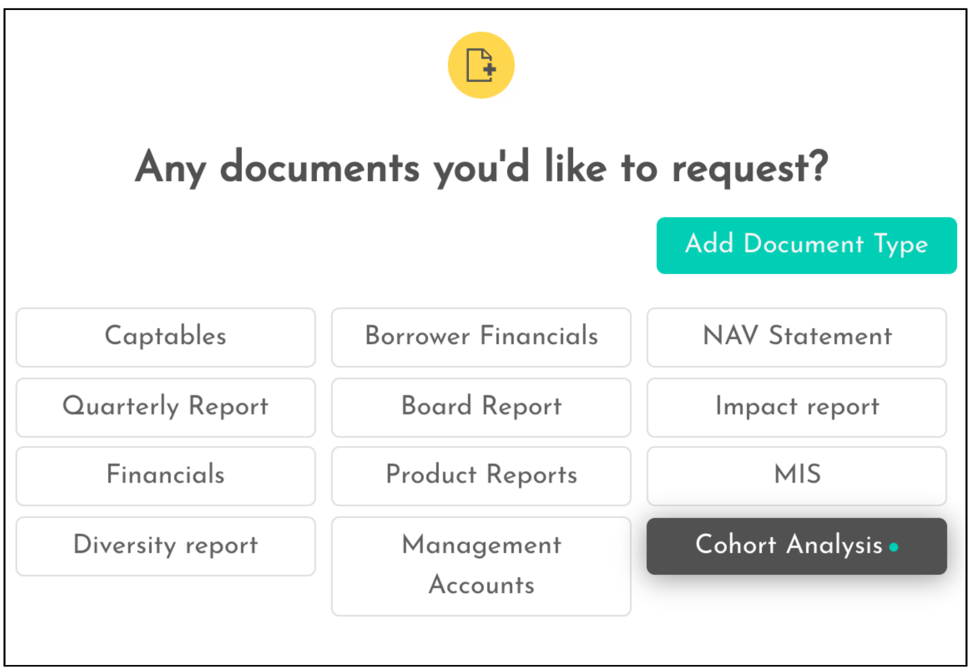
5. **Select Text Updates**. Select the updates you want to collect.




**Add new type:** Create a custom update type you want to request.

Hit 'Next'.

6. **Select File types**. Select the file types you want to collect.




**Add document type:** Create a custom update type you want to request.

Hit '**Save**'.

7. Click 'Schedule' to schedule your request. Select 'Later' to do it later.

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Now that you've created a new request, let's create a schedule, so your portfolio companies can submit the metrics periodically.

## Related articles

- Create a request
- Schedule a request
- Request a submission
- Submit metrics online
- Approve a submission