

Create a request

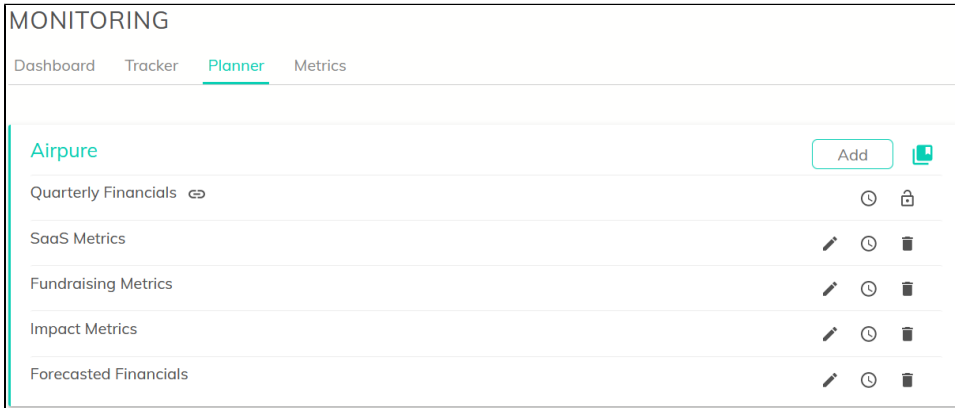
To request your portfolio companies to submit their metrics, follow this guide.

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.

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- 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.

What would you like to be updated about?

Add New Type

Customer 4500 characters	Finance 4500 characters	People 4500 characters	Legal 4500 characters
Market 4500 characters	Thesis 4500 characters	Exit Strategy 4500 characters	Exit Update 4500 characters
Product 4500 characters	Assessment 4500 characters	Extraordinary 4500 characters	Highlights 4500 characters
Lowlights 4500 characters	Other 4500 characters	Portfolio Updates 4500 characters	Impact update 4500 characters
COVID update 4500 characters			

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.

Any documents you'd like to request?

Add Document Type

Captables	Borrower Financials	NAV Statement
Quarterly Report	Board Report	Impact report
Financials	Product Reports	MIS
Diversity report	Management Accounts	Cohort Analysis

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.

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](#)