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Quick Start Guide: Data Requests

How to respond to a data request

- Login to https://app.plia.com.
- Select **TASKS** on the black menu bar.
- Select **DATA REQUESTS** on the grey submenu.
    - All data requests that require a response will be listed on the left.
- Click on the request to which you would like to respond.
- Click the **EDIT TASK** button to open the response form.
- Enter your response.
    - You may add an optional explanation and/or attachments as appropriate.
    - You can save your responses without sending to your client by clicking SAVE at anytime
- Click the **APPROVE** checkbox when complete.
    - If you are a 1st Level user, your response will be sent to the client.
    - If you are not a 1st Level user, your response will simply be sent to next level of users within your firm.
- Click the **SAVE** button to *send*.
    - If you marked the response as approved, it will be removed from your screen.

To verify that your response(s) have been sent to the client

- Go to the DASHBOARD / DATA REQUESTS screen and scroll down to the ***Data Responses to Counterparties*** graph.
- The client bar will be *green* (published) for the Data Request(s) you completed and sent to the client.