Requests for information

Asking a tribe or franchisee for something — bank statements, an explanation, a missing certificate — as a dated task rather than an email that gets lost.

An **information request** is the second kind of action. A corrective action says fix something; an information request says send us something. "Send the Q2 bank statements", "explain the labour cost spike in March", "lodge the certificate that expired last month".

Raise one from **Actions** with **Create**, and set **Type** to Information request.

Why not just send an email

- It has a due date, so it appears in the overdue count when it is ignored.
- It sits on the tribe profile, so the next advisor sees it was asked.
- The reply is written on the request itself, not scattered across inboxes.
- It survives somebody leaving. An email thread does not.

> **THE SAME LIST AS EVERYTHING ELSE**
> Information requests sit in the same list as corrective actions, because from the tribe's point of view they are the same thing: something the franchisor is waiting on. Filter by Type when you want one or the other.

How it is answered

The request appears on the tribe's own **Actions** page and in its **To do**. When the franchisee marks it **Done** they are asked for a reply and can attach the files you asked for. Open the request from your Actions page to read the reply and open the files, then move it to **Verified** once you are satisfied, the same as any other action. If the franchisee sends the answer some other way — by email, say — you can still type the reply in yourself and move it along.

> **A FILE ON A REQUEST IS NOT A LODGED DOCUMENT**
> A certificate attached to a request stays with that request. It does not count as the insurance certificate or the food safety licence on the tribe's profile, and it will not stop the document showing as missing. If what you asked for has a document type, ask the tribe to lodge it from its Documents page instead, or lodge it yourself from the file they sent, and note the request in the reply so the two are easy to tie together.

If the answer is not satisfactory, move it back to Open with a note saying what is still needed rather than raising a second request. One thread, one history.

Good uses

Situation	What to raise
A required document has lapsed	An information request naming the document and the date it expired.

A financial review found a variance	A request for the underlying statements, marked high.
A complaint needs the tribe's account	A request for their version, due in a few days.
Something is genuinely broken	A corrective action, not a request — you are not waiting on information.

ASK FOR ONE THING AT A TIME

A request that asks for four unrelated documents can only be Done once, so it stays open until the slowest one arrives and you lose sight of what is actually outstanding. Raise one per thing.