



**COMPASS**

by Bespoke Metrics

# Subcontractor User Guide

# Table of Contents

## Step 1: COMPASS Registration

- Receiving Your Invitation
- Creating your COMPASS Account
- Provide Your Company Name
- Select Your Country
- NEW Company Registration
- EXISTING Company Registration

## Step 2: COMPASS 1Form Submission

- Start Your Prequalification
- Invite Your Team
- User Roles
- Starting Your 1Form
- Sections of the 1Form
- Filling Out the 1Form
- End of Section Review
- Submitting the 1Form

## Step 3: Regions of Work

## Step 4: Financial Authorization

## Step 5: Q Score and Analytics

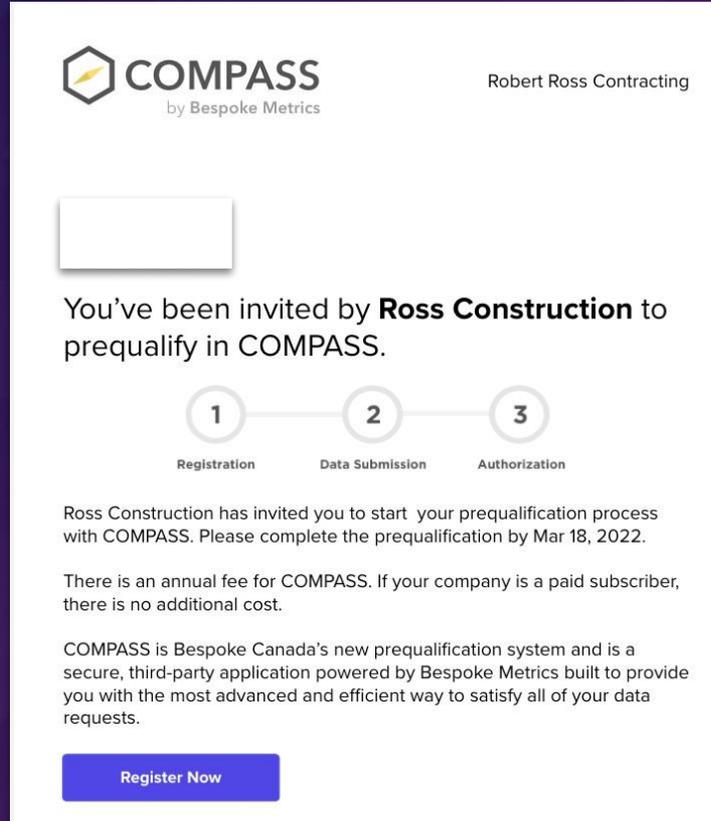
## Step 6: Support Options

## Step 7: Additional Features

# Step 1: COMPASS Registration

## Receiving Your Invitation

1. You will receive an email to register. Click the “Register Now” button
2. To begin Registration enter your email address and press “Next”



The screenshot shows an email invitation from COMPASS by Bespoke Metrics to Robert Ross Contracting. The email content includes:

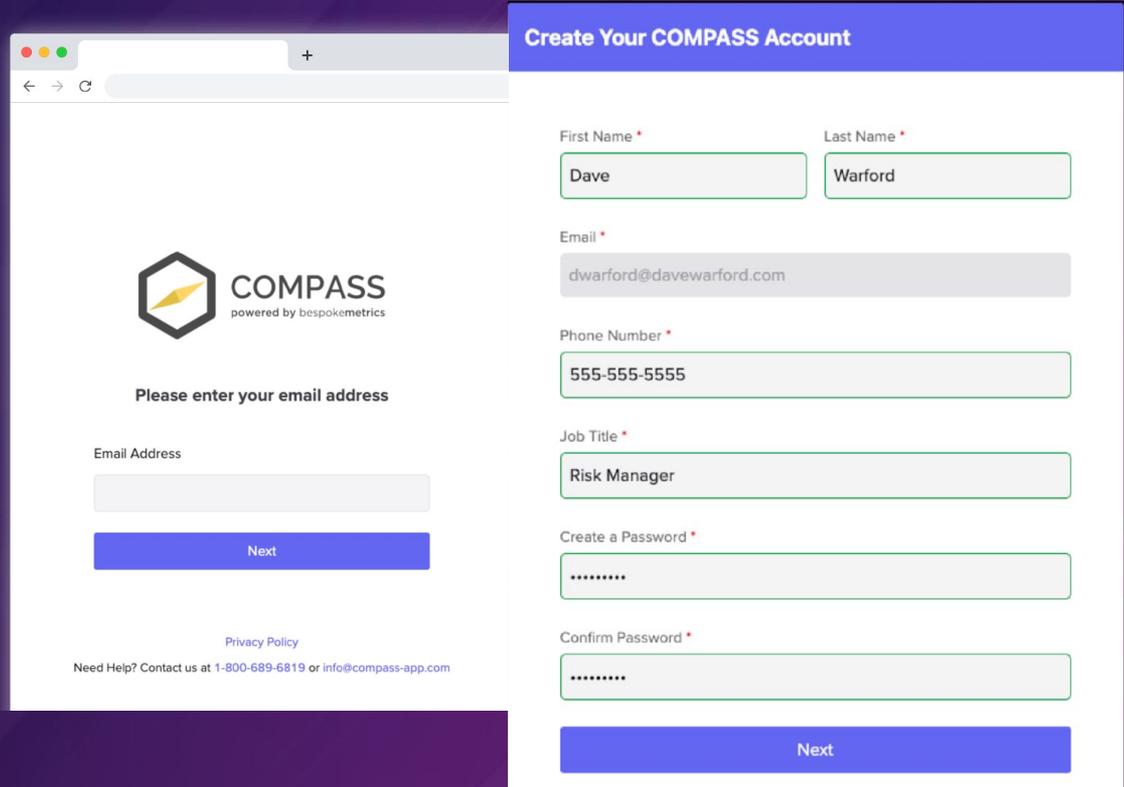
- COMPASS logo and company name: Robert Ross Contracting
- A placeholder box for an image.
- Text: "You've been invited by **Ross Construction** to prequalify in COMPASS."
- A progress bar with three steps: 1. Registration, 2. Data Submission, 3. Authorization. Step 1 is highlighted.
- Text: "Ross Construction has invited you to start your prequalification process with COMPASS. Please complete the prequalification by Mar 18, 2022."
- Text: "There is an annual fee for COMPASS. If your company is a paid subscriber, there is no additional cost."
- Text: "COMPASS is Bespoke Canada's new prequalification system and is a secure, third-party application powered by Bespoke Metrics built to provide you with the most advanced and efficient way to satisfy all of your data requests."
- A blue "Register Now" button.

# COMPASS Registration

## Creating your COMPASS account

To Start, input the email address you would like to use to register your account and select “Next”.

Create your COMPASS account by filling out all the fields and press “Next”.



The image shows a browser window with two screenshots of the COMPASS registration process. The left screenshot shows the initial step where the user is prompted to enter their email address. The right screenshot shows the subsequent step where the user fills out a complete registration form.

**Create Your COMPASS Account**

COMPASS powered by bespokenmetrics

Please enter your email address

Email Address

Next

Privacy Policy

Need Help? Contact us at 1-800-689-6819 or info@compass-app.com

First Name \* Dave

Last Name \* Warford

Email \* dwarford@davewarford.com

Phone Number \* 555-555-5555

Job Title \* Risk Manager

Create a Password \* .....

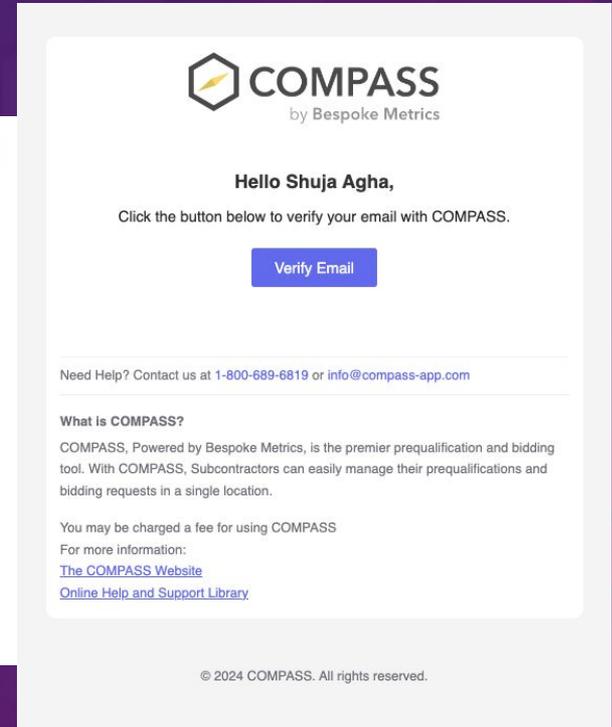
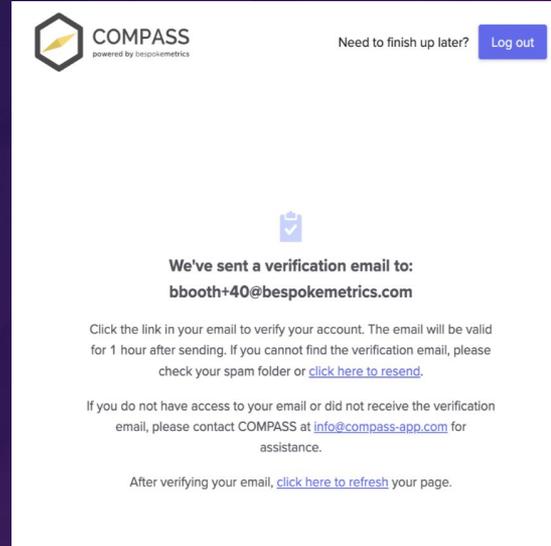
Confirm Password \* .....

Next

# COMPASS Registration

## Verify your Email Address

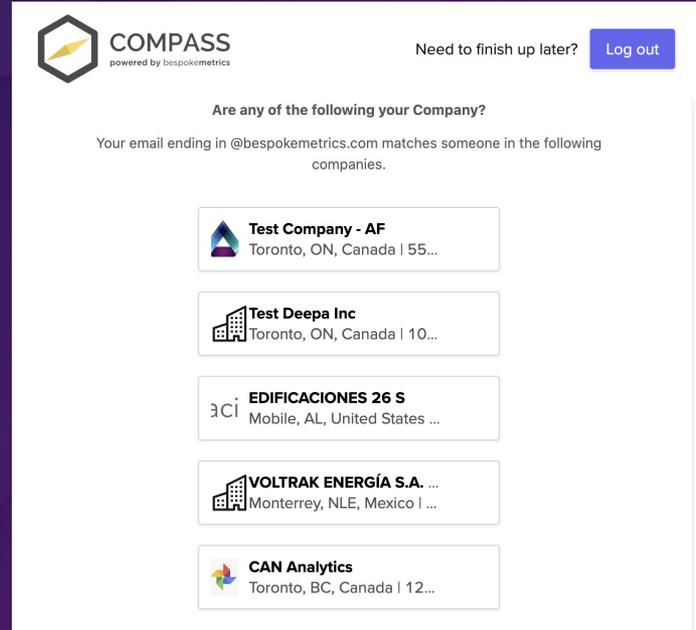
An email will be sent to your email address, click the “verify email” button on the email that is sent and it will return you to the registration process.



# COMPASS Registration

## Suggested Companies

COMPASS will help to identify any existing companies with a matching email domain. If your company already exists, you can request to join by clicking on the company and a request will be sent to the company admin for approval.

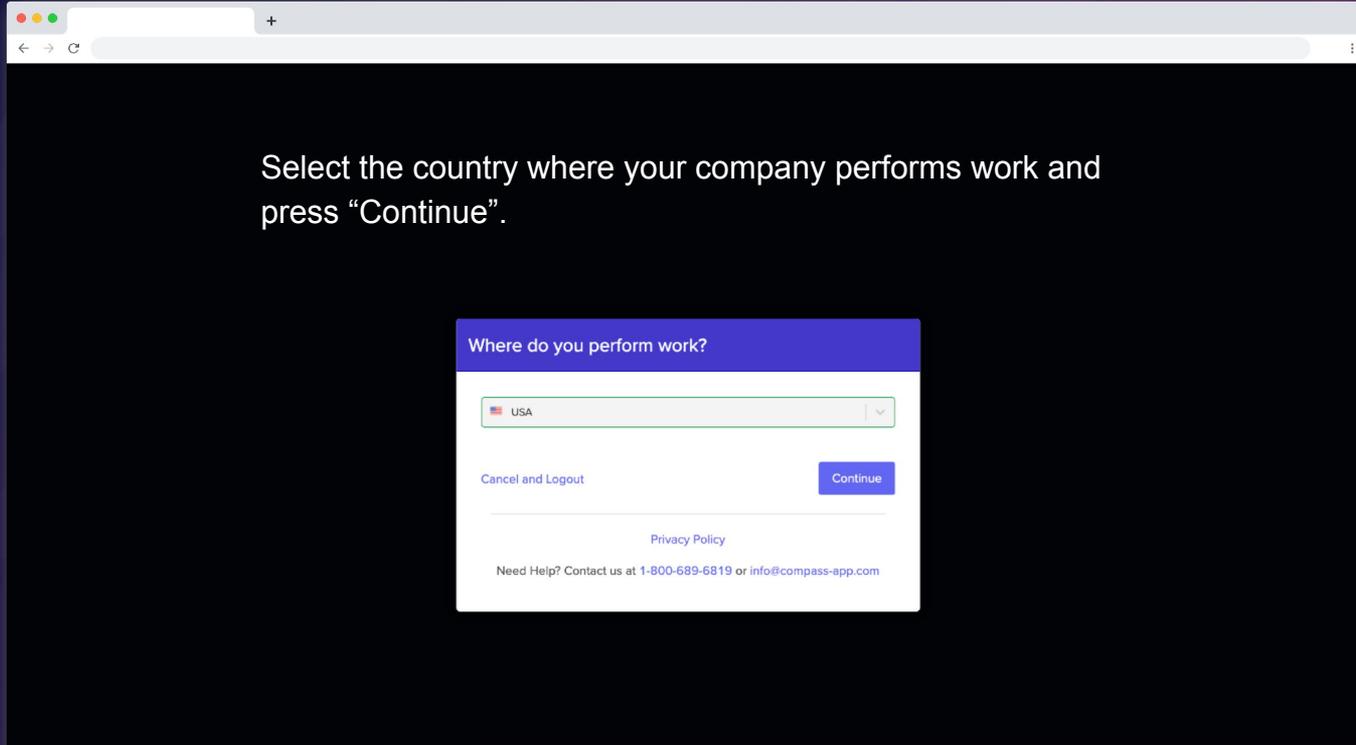


The screenshot shows the COMPASS registration interface. At the top left is the COMPASS logo with the text "powered by bespokemetrics". At the top right, there is a link "Need to finish up later?" and a "Log out" button. The main heading is "Are any of the following your Company?". Below this, a message states: "Your email ending in @bespokemetrics.com matches someone in the following companies." There are five suggested companies listed in a vertical list, each with a small icon, the company name, and a truncated location:

-  **Test Company - AF**  
Toronto, ON, Canada | 55...
-  **Test Deepa Inc**  
Toronto, ON, Canada | 10...
-  **EDIFICACIONES 26 S**  
Mobile, AL, United States ...
-  **VOLTRAK ENERGÍA S.A. ...**  
Monterrey, NLE, Mexico | ...
-  **CAN Analytics**  
Toronto, BC, Canada | 12...

# COMPASS Registration

## Select Your Country of Operation



Select the country where your company performs work and press "Continue".

Where do you perform work?

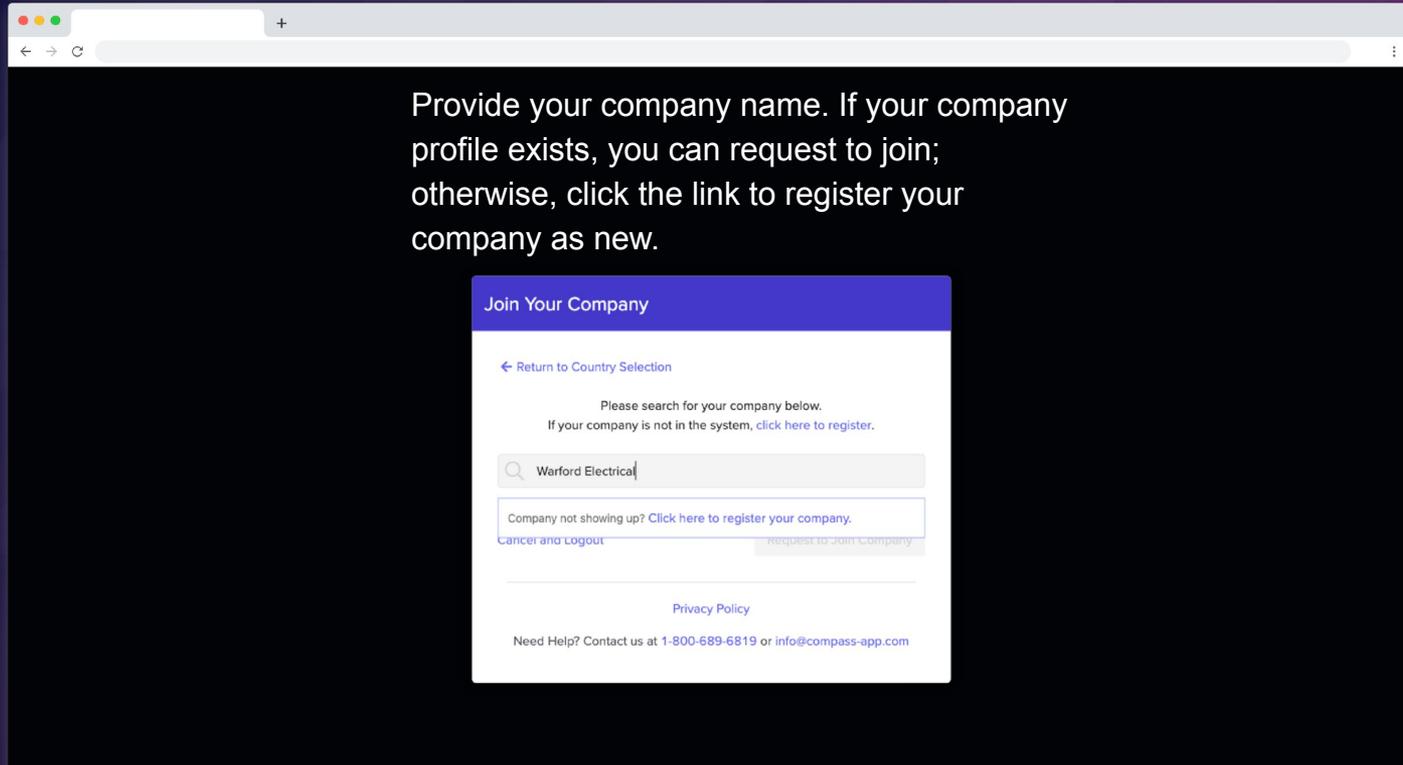
[Cancel and Logout](#) [Continue](#)

[Privacy Policy](#)

Need Help? Contact us at 1-800-689-6819 or [info@compass-app.com](mailto:info@compass-app.com)

# COMPASS Registration

## Search for an existing Company Account



Provide your company name. If your company profile exists, you can request to join; otherwise, click the link to register your company as new.

### Join Your Company

[← Return to Country Selection](#)

Please search for your company below.  
If your company is not in the system, [click here to register](#).

Company not showing up? [Click here to register your company.](#)

[Cancel and Logout](#) [Request to Join Company](#)

---

[Privacy Policy](#)

Need Help? Contact us at 1-800-689-6819 or [info@compass-app.com](mailto:info@compass-app.com)

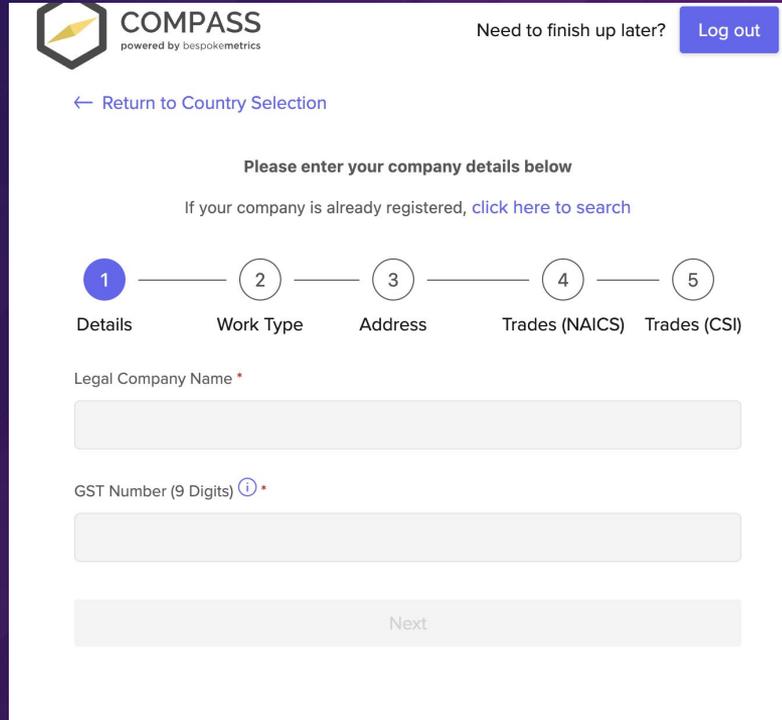
# COMPASS Registration

## New Company Registration

Fill in your company's legal name, work type, address, city, state, zip code, number of employees, and annual revenue.

Provide your Unique GST Number or Tax ID (FEIN).  
If your GST or Tax ID number already exists you will be prompted to join that existing company.

Choose your primary trade (NAICS & CSI Codes) and click "Create My Company".



The screenshot shows the COMPASS registration interface. At the top left is the COMPASS logo with the tagline "powered by bespokemetrics". At the top right, there is a link "Need to finish up later?" and a blue "Log out" button. Below the header is a blue link "Return to Country Selection". The main heading is "Please enter your company details below", followed by a link "If your company is already registered, click here to search". A progress indicator shows five steps: 1 (Details), 2 (Work Type), 3 (Address), 4 (Trades (NAICS)), and 5 (Trades (CSI)). Step 1 is currently active. Below the progress indicator are three input fields: "Legal Company Name" with a red asterisk, "GST Number (9 Digits)" with a help icon and a red asterisk, and a "Next" button.

# COMPASS Registration

## Existing Company Registration

If your company has already registered with COMPASS you will receive an alert to join an existing company. Select “click here” to join.

← Return to Country Selection

Please enter your company details below

If your company is already registered, [click here to search](#)

1 — 2 — 3 — 4 — 5  
Details — Work Type — Address — Trades (NAICS) — Trades (CSI)

Legal Company Name \*

GST Number (9 Digits) ⓘ \*

This GST Number is already registered. [Click here to join an existing company](#) or contact support.

 Your request to join test company is still pending approval.

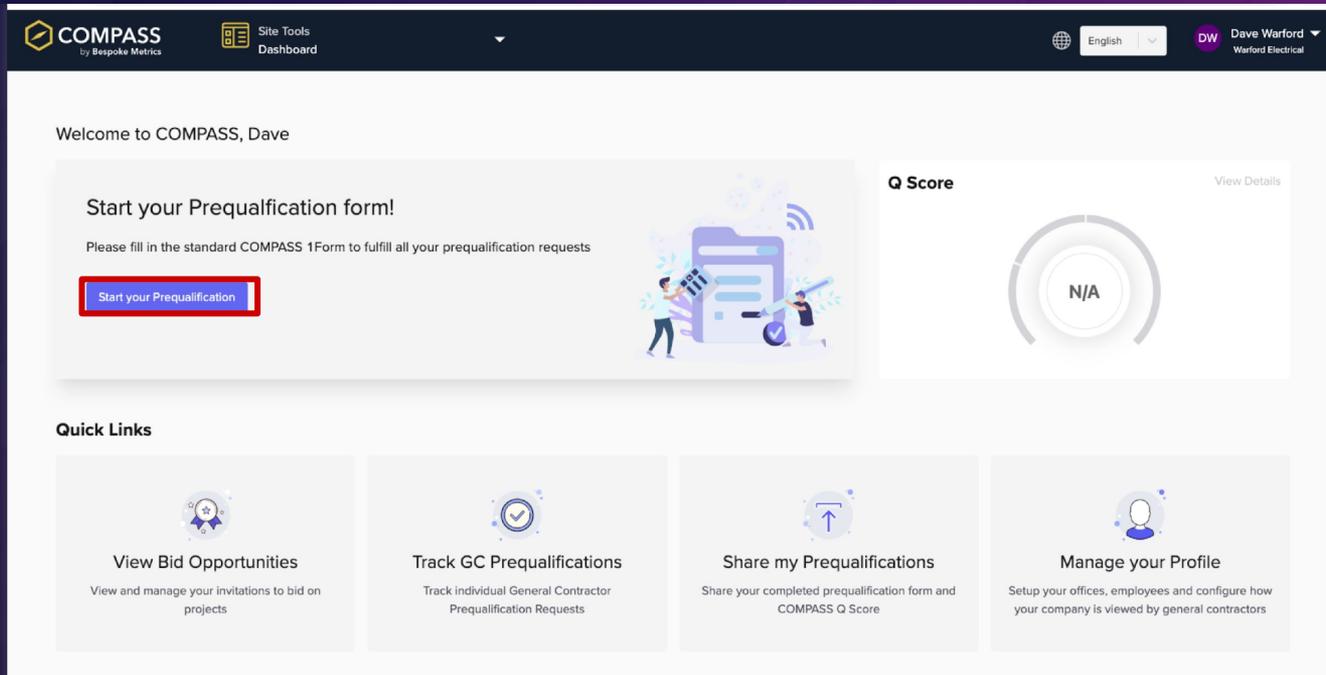
Please contact your administrator (sam test - [samtest1@bespokemetrics.com](mailto:samtest1@bespokemetrics.com)) or COMPASS Support ([1-800-689-6819](tel:1-800-689-6819) or [info@compass-app.com](mailto:info@compass-app.com)) to gain access to additional COMPASS features

Note that your company admin will have to approve your registration in order to gain access to Compass. This can be completed by the admin under the company directory.

# Step 2: COMPASS 1 Form Submission

## Start Your Prequalification

Once signed in, you will be directed to your dashboard where you can access all features on COMPASS. Click the “Start your prequalification” button to begin your 1Form.



The screenshot displays the COMPASS dashboard interface. At the top, the navigation bar includes the COMPASS logo, 'Site Tools Dashboard', a language dropdown set to 'English', and the user profile 'Dave Warford Warford Electrical'. The main content area features a welcome message, a prominent 'Start your Prequalification form!' section with a red-bordered button, and a 'Q Score' gauge showing 'N/A'. Below these are four 'Quick Links' cards for bid opportunities, GC prequalifications, sharing prequalifications, and profile management.

Welcome to COMPASS, Dave

**Start your Prequalification form!**

Please fill in the standard COMPASS 1Form to fulfill all your prequalification requests

[Start your Prequalification](#)

**Q Score** [View Details](#)

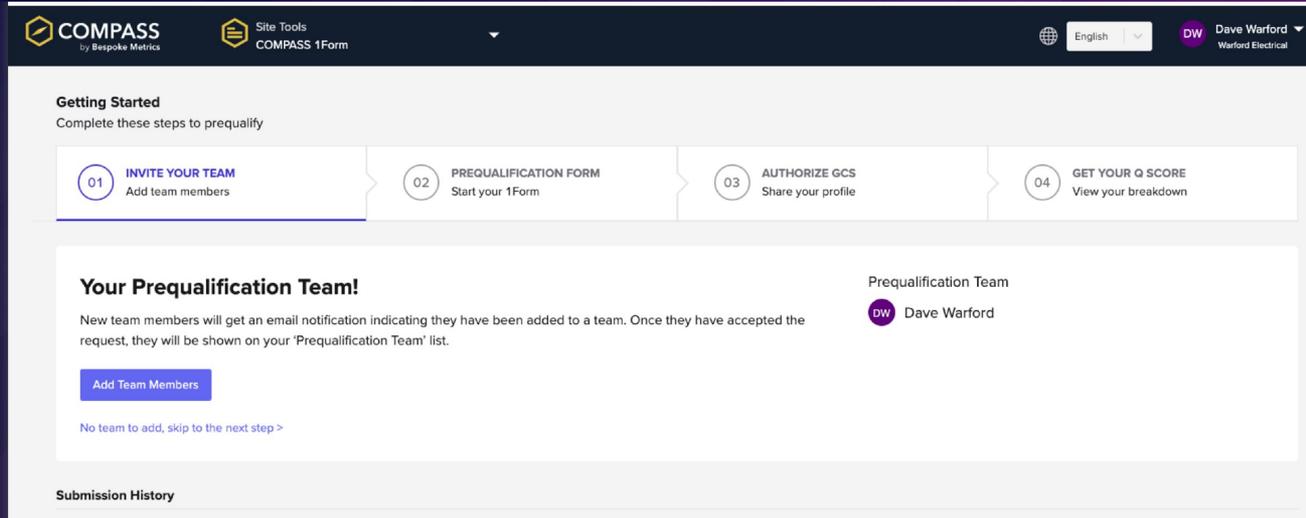
N/A

**Quick Links**

- View Bid Opportunities**  
View and manage your invitations to bid on projects
- Track GC Prequalifications**  
Track individual General Contractor Prequalification Requests
- Share my Prequalifications**  
Share your completed prequalification form and COMPASS Q Score
- Manage your Profile**  
Setup your offices, employees and configure how your company is viewed by general contractors

# COMPASS 1Form Submission

## Invite Your Team



The screenshot shows the COMPASS 1Form submission interface. At the top, there is a dark navigation bar with the COMPASS logo, 'Site Tools COMPASS 1Form', a language dropdown set to 'English', and a user profile for 'Dave Warford' (Warford Electrical). Below the navigation bar, the 'Getting Started' section is visible, with the instruction 'Complete these steps to prequalify'. A progress bar contains four steps: 01 INVITE YOUR TEAM (Add team members), 02 PREQUALIFICATION FORM (Start your 1Form), 03 AUTHORIZE GCS (Share your profile), and 04 GET YOUR Q SCORE (View your breakdown). The 'INVITE YOUR TEAM' step is currently active. Below the progress bar, the 'Your Prequalification Team!' section is displayed. It includes a message: 'New team members will get an email notification indicating they have been added to a team. Once they have accepted the request, they will be shown on your 'Prequalification Team' list.' There is a blue 'Add Team Members' button and a link that says 'No team to add, skip to the next step >'. To the right, under the heading 'Prequalification Team', there is a single team member listed: 'DW Dave Warford'.

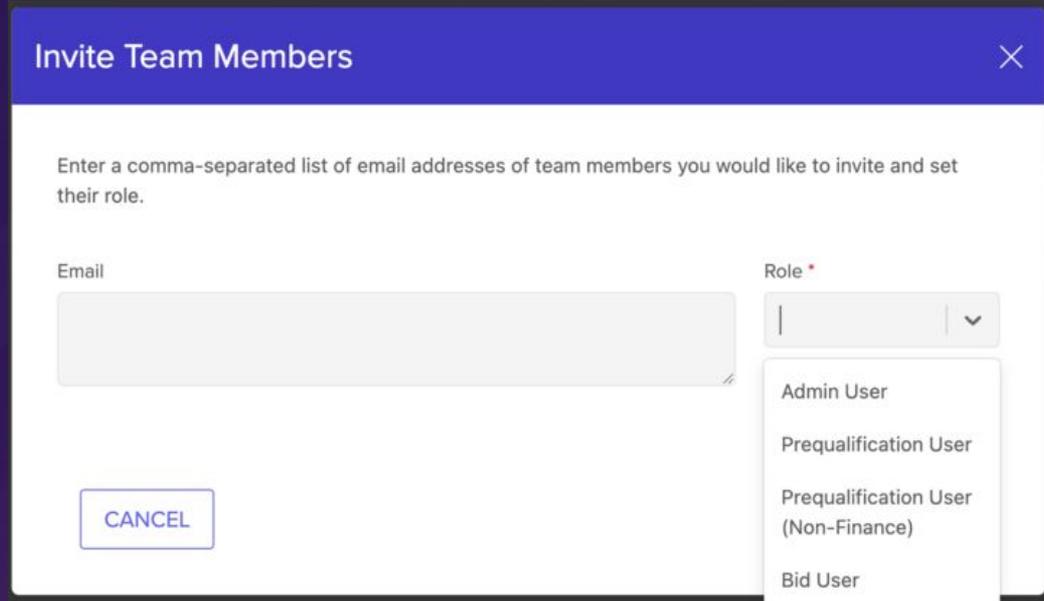
If additional team members require access to the prequalification form, select the “Add Team Members” button and invite them to join the account. They will receive an invitation to create their account to assist with the COMPASS 1Form.

# COMPASS 1Form Submission

## User Roles

### User roles include:

- **Admin User** - Ability to add/edit/invite users, upload and view all information, and submit 1Form.
- **Prequalification User** - Ability to view and upload all information, including financials and submit 1Form.
- **Prequalification User (Non - Finance)** - Identical to Prequalification User, but restricted from viewing company financials.
- **Bid User** - Access only to ITB and no access to 1Form

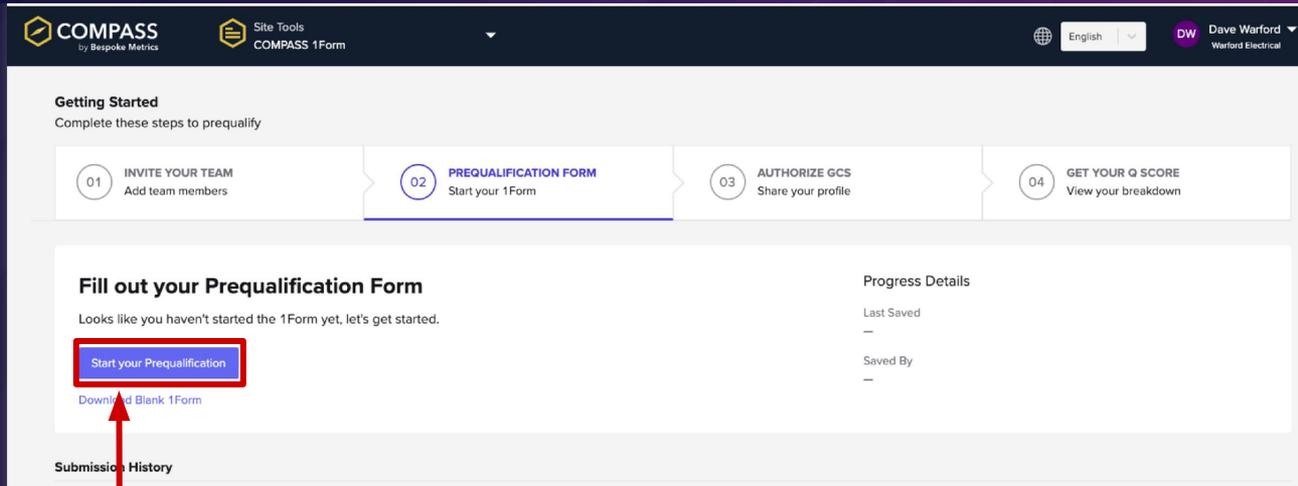


The screenshot shows a dialog box titled "Invite Team Members" with a close button (X) in the top right corner. Below the title bar, there is a text prompt: "Enter a comma-separated list of email addresses of team members you would like to invite and set their role." Below this prompt, there are two input fields: "Email" and "Role \*". The "Email" field is a large text area. The "Role \*" field is a dropdown menu with a downward arrow. The dropdown menu is open, showing four options: "Admin User", "Prequalification User", "Prequalification User (Non-Finance)", and "Bid User". At the bottom left of the dialog box, there is a "CANCEL" button.

Multiple email addresses can be added, separated by commas. Select the User Role and Send Invite(s)

# COMPASS 1Form Submission

## Starting Your 1Form

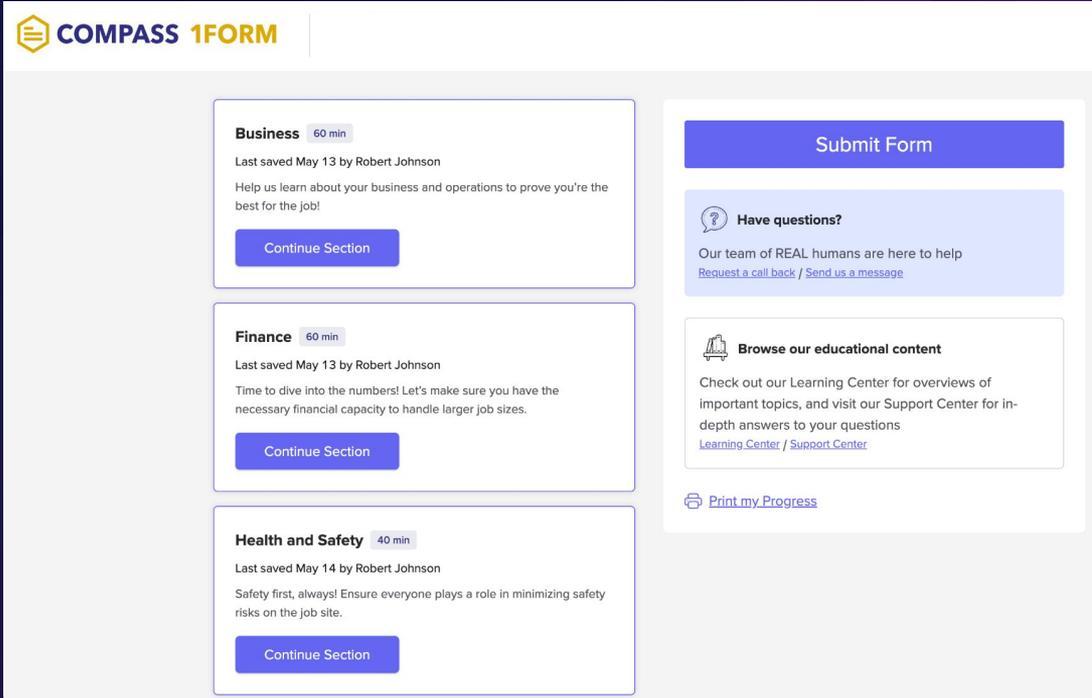


The screenshot shows the COMPASS 1Form submission interface. At the top, there is a navigation bar with the COMPASS logo, 'Site Tools COMPASS 1Form', a language dropdown set to 'English', and a user profile for 'Dave Warford' from 'Warford Electrical'. Below the navigation bar, a 'Getting Started' section contains a progress bar with four steps: 01 INVITE YOUR TEAM (Add team members), 02 PREQUALIFICATION FORM (Start your 1Form), 03 AUTHORIZE GCS (Share your profile), and 04 GET YOUR Q SCORE (View your breakdown). The second step, 'PREQUALIFICATION FORM', is currently active. Below the progress bar, the main content area is titled 'Fill out your Prequalification Form' and includes the text 'Looks like you haven't started the 1Form yet, let's get started.' A blue button labeled 'Start your Prequalification' is highlighted with a red box, and a red arrow points to it from below. Below this button is a link for 'Download Blank 1Form'. To the right of the main content area, there is a 'Progress Details' section with 'Last Saved' and 'Saved By' fields, both currently empty.

Click the “Start your Prequalification”  
button to start or update the COMPASS  
1Form

# COMPASS 1Form Submission

## Sections Of The 1Form

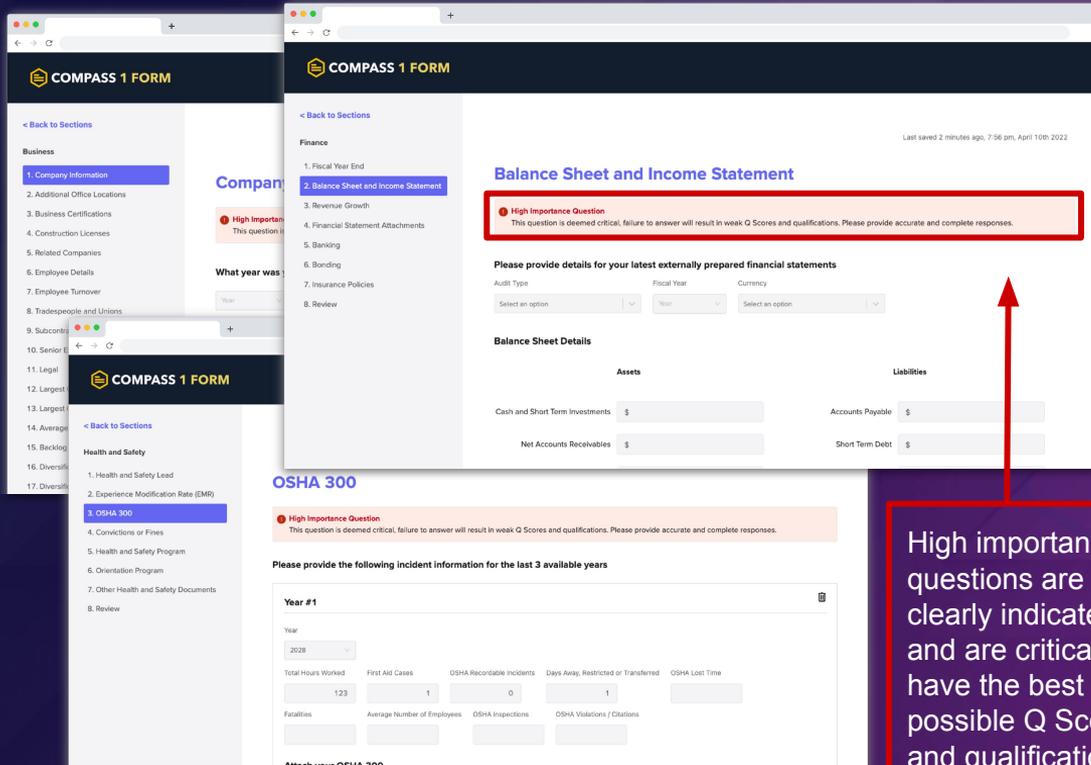


The screenshot shows the COMPASS 1Form submission interface. At the top left is the COMPASS 1FORM logo. The main content area is divided into three vertical sections on the left and a right sidebar. The first section is 'Business' (60 min), last saved May 13 by Robert Johnson, with a 'Continue Section' button. The second is 'Finance' (60 min), last saved May 13 by Robert Johnson, with a 'Continue Section' button. The third is 'Health and Safety' (40 min), last saved May 14 by Robert Johnson, with a 'Continue Section' button. The right sidebar contains a 'Submit Form' button, a 'Have questions?' section with a 'Request a call back / Send us a message' link, and a 'Browse our educational content' section with links to 'Learning Center' and 'Support Center'. At the bottom of the sidebar is a 'Print my Progress' link.

- Each section of the 1Form is separate (Business, Finance and Health & Safety) and must be submitted as a whole after each section is complete.
- The 1Form sections can be completed individually or concurrently by other users.
- Progress is automatically saved.

# COMPASS 1Form Submission

## Filling Out The 1Form



The screenshot displays the COMPASS 1Form submission interface. The left sidebar shows a navigation menu with sections 1 through 17. The main content area is divided into two sections: 'Balance Sheet and Income Statement' and 'OSHA 300'. Both sections feature a 'High Importance Question' warning box, which is highlighted with a red border. A red arrow points from the 'High Importance Question' box in the OSHA 300 section to the corresponding box in the Balance Sheet and Income Statement section.

**Balance Sheet and Income Statement**

**High Importance Question**  
This question is deemed critical, failure to answer will result in weak Q Scores and qualifications. Please provide accurate and complete responses.

Please provide details for your latest externally prepared financial statements

Audit Type:  Fiscal Year:  Currency:   
Select an option  Year  Select an option

**Balance Sheet Details**

Assets		Liabilities	
Cash and Short Term Investments	\$ <input type="text"/>	Accounts Payable	\$ <input type="text"/>
Net Accounts Receivables	\$ <input type="text"/>	Short Term Debt	\$ <input type="text"/>

**OSHA 300**

**High Importance Question**  
This question is deemed critical, failure to answer will result in weak Q Scores and qualifications. Please provide accurate and complete responses.

Please provide the following incident information for the last 3 available years

**Year #1**

Year:

Total Hours Worked:  First Aid Cases:  OSHA Recordable Incidents:  Days Away, Restricted or Transferred:  OSHA Lost Time:

Fatalities:  Average Number of Employees:  OSHA Inspections:  OSHA Violations / Citations:

Attach your OSHA 300

Fill in all of the 1Form questions, and upload documents if required.

High importance questions are clearly indicated, and are critical to have the best possible Q Score and qualification.

# COMPASS 1Form Submission

## End of Section Review

### Review

Before submitting your prequalification form, take a moment to review your answers.

Completing any missed High Importance Questions and fixing Data Validation Warnings can improve your prequalification outcome, though these changes are not required.

**Press Next when done to proceed to the next section**

#### 1 High Importance Questions (Unanswered)

While these questions are not required, they are crucial to your prequalification process, and missing them could still affect your eligibility.

#### Most Recent Year End Financial Statements

 **Complete Question**

Balance Sheet Details (values should correspond with documents attached to this section and will be used in Q Score calculations)

Net Accounts Receivables

Under Billings

Short-Term Shareholder Receivables

Short-Term Intercompany Receivables

Total Current Assets

Goodwill & Intangibles

Long-Term Shareholder Receivables

Long-Term Intercompany Receivables

#### **Completed Questions**

##### **General**

 **Update Answer** 

Does your company currently use an external third party to prepare your financial statements?

Yes

What is your fiscal year end?

28/Oct

When are your external financial statements normally ready?

29/Sep

If providing parent (or group) financial statements, will you provide a parent company guarantee (or cross company guarantee) to all general contractors?

No

Each section of the 1Form includes a review segment. This feature allows you to check the provided information and identify any incomplete areas, which could negatively impact your prequalification.

To add a response to an unanswered question use the “complete question” button.

To update a response to a completed question use the “update answer” button.

# COMPASS 1Form Submission

## High Importance Questions

**Warning** ×

**We have detected that you have not completed all of the questions that are deemed as High Importance on this page.**

These questions are deemed critical, failure to answer may affect your qualification process.

[Ignore & Don't Remind Me](#)

**We have detected 6 validation warnings based on your data.**

1. Contract Length must be between 1 and 120 months
2. Contract Length must be between 1 and 120 months
3. Contract Length must be between 1 and 120 months
4. Please enter the project name
5. Please enter the project name
6. Please enter the project name

[Proceed Anyway](#) [Fix](#)

You will be prompted with a pop up when navigating away from a high importance question that does not appear to be entered correctly. If the information is correct, you can use the ignore & don't remind me button to remove the notification.

# COMPASS 1Form Submission

## Submitting The 1Form

 COMPASS 1Form

[Back to Section Menu](#) | [Save and Exit](#)

At any time you can exit the 1Form by clicking the Save and Exit button in the top right corner of the page.

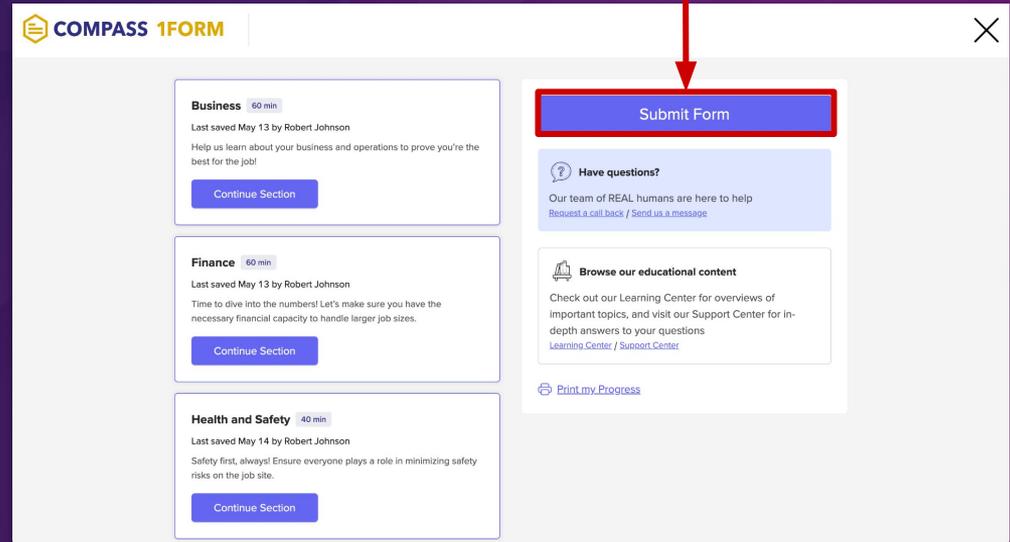
Use the Back to Section Menu to return to the 1Form homepage where you can submit.

Ensure you submit the 1Form after completing all 3 sections.

**Confirm** ✕

I confirm that all information entered is accurate and acknowledge that leaving any high importance questions blank may impact my qualification and Q Score

[Go back and review](#) [I acknowledge and submit](#)



**COMPASS 1FORM** ✕

**Business** 60 min  
Last saved May 13 by Robert Johnson  
Help us learn about your business and operations to prove you're the best for the job!  
[Continue Section](#)

**Finance** 60 min  
Last saved May 13 by Robert Johnson  
Time to dive into the numbers! Let's make sure you have the necessary financial capacity to handle larger job sizes.  
[Continue Section](#)

**Health and Safety** 40 min  
Last saved May 14 by Robert Johnson  
Safety first, always! Ensure everyone plays a role in minimizing safety risks on the job site.  
[Continue Section](#)

**Submit Form**

**Have questions?**  
Our team of REAL humans are here to help  
[Request a call back](#) / [Send us a message](#)

**Browse our educational content**  
Check out our Learning Center for overviews of important topics, and visit our Support Center for in-depth answers to your questions  
[Learning Center](#) / [Support Center](#)

[Print my Progress](#)

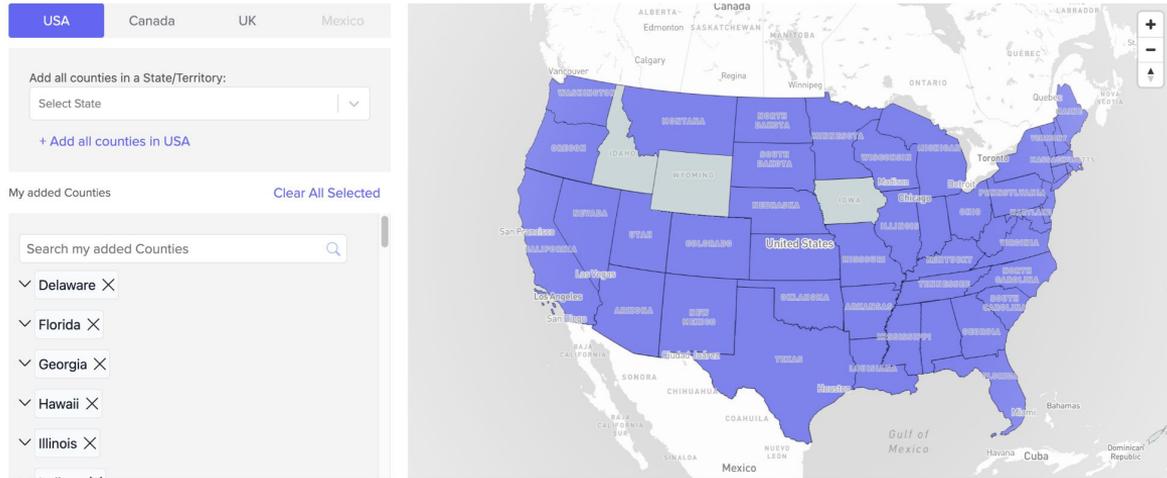
Select the checkbox and click “I acknowledge and submit”.

# Step 3: Regions of Work

## Which States/Territories do you work in/are open to working in?

Click regions in the map to add regions of work, or select entire states using the left menu. Click Save Changes when you're done to save changes made to your maps!

Save Changes



Regions of Work help subcontractors connect with general contractors. [Click here to learn how you can add your regions of work.](#)

Next, you will be prompted to select the regions that your company operates in.

Regions can be selected at a Country, state/province and county/division level and can be removed from the left hand side under “My added Counties”.

This tool is designed to connect subcontractors with the relevant General Contractors who operate in their regions of work.

# Step 3: Financial Authorization

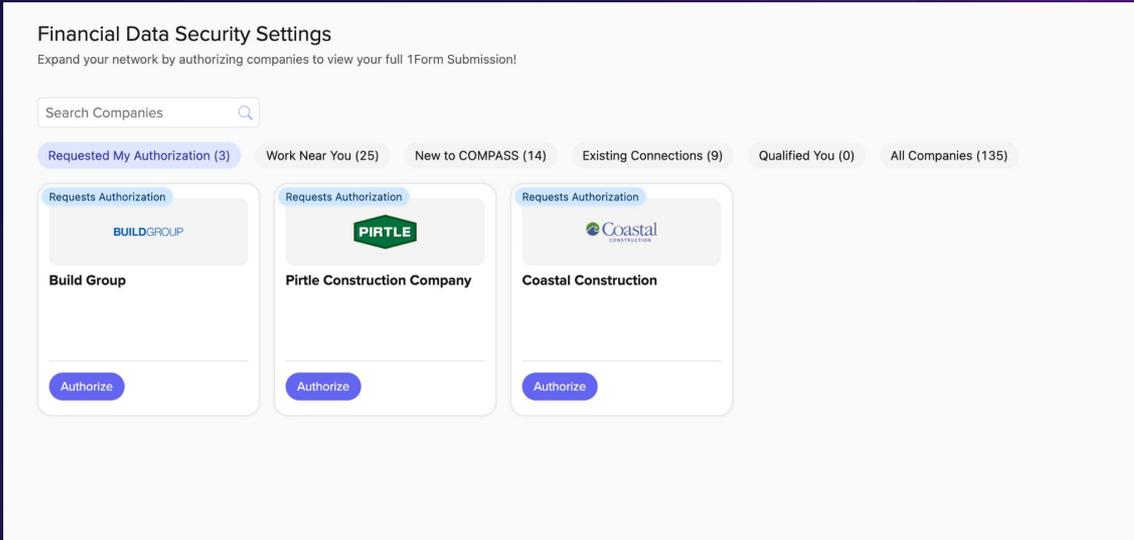
After submission, you will be prompted to select the General Contractors you would like to access your financial information on COMPASS.

No General Contractor has access to your financial statements unless authorized by your company.

To grant access to a General Contractor click the Authorize button below their name.

Granting access to financial data is optional but is highly recommended.

Your selections can be managed from the existing connections tab.



The screenshot shows the 'Financial Data Security Settings' page. At the top, it says 'Expand your network by authorizing companies to view your full 1Form Submission!'. Below this is a search bar labeled 'Search Companies'. There are several tabs: 'Requested My Authorization (3)', 'Work Near You (25)', 'New to COMPASS (14)', 'Existing Connections (9)', 'Qualified You (0)', and 'All Companies (135)'. The 'Requested My Authorization (3)' tab is active, showing three cards for companies: 'Build Group', 'Pirtle Construction Company', and 'Coastal Construction'. Each card has an 'Authorize' button at the bottom.

# Step 4: Q Score and Analytics

After submitting the 1Form, your submission will be reviewed by the COMPASS team and a Q Score will be assigned and available for download.

You will receive an email with your Q Score and submission feedback.

You can access your QScore and Factors affecting your Q Score from your Dashboard.

General Contractors use your Q Score as a crucial factor in determining your prequalification status.

### COMPASS Q Score

Based on Submission dated —

[Print / Download for offline sharing](#)



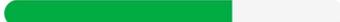
## Your Q Score is **Strong!**

The Q Score is COMPASS' assessment of Subcontractor Risk based on key Business, Finance, and Health & Safety variables. General Contractors use the Q Score as a determining factor during your prequalification. Providing information that is out of date and/or failing to complete the 1Form in full will impact your Q Score negatively. Once your 1Form is completed, your Q Score could take up to 2-3 business days to generate.

**Overview** Factors Affecting Your Score

#### What are my strengths and weaknesses?

View detailed breakdowns of where your data is strong as well as areas to improve on.

Finance	Business	Health and Safety
		
		
		

# Step 5: Support Options



## Have questions?

Our team of REAL humans are here to help  
[Request a call back](#) / [Send us a message](#)



## Browse our educational content

Check out our Learning Center for overviews of important topics, and visit our Support Center for in-depth answers to your questions  
[Learning Center](#) / [Support Center](#)

If you have questions or need support you can send a message or request a phone call. [info@compass-app.com](mailto:info@compass-app.com) or 1.800.689.6819.

The COMPASS Team will get in contact with you as soon as possible.

You can also refer to our Learning Center and Support Center for assistance and step-by-step instructions.

For live support, there is a chat bubble on every page where you can get real-time assistance from our client services team.



# Additional Features

## COMPASS Select List

Subcontractors who receive a Green Q Score (1.0-3.9) will make the COMPASS Select List.

This list is COMPASS' list of Top Subcontractors for the year who show excellence in Business, Finance and Health and Safety metrics.

The Select List is available publicly on the Bespoke Metrics [website](#) and quarterly updates with new Select List members is shared with the COMPASS General Contractor Network.

You will receive an email with a link to marketing and promotional material for you to share with your network.

Pair your select list badge with your Q Score breakdown to use as analytical justification on why you should be hired on more projects!

Q Scale	
Q-1	Strongest Execution Ability
Q-2	Very Strong Execution Ability
Q-3	Strong Execution Ability



# Additional Features

## COMPASS Data Control

COMPASS is designed to be used as a centralized prequalification platform to address all prequalification requests.

Our industry standard COMPASS 1Form can be used to prequalify with any General Contractor.

With COMPASS Data Control, securely share your COMPASS 1Form with General Contractors outside of the COMPASS network to save yourself time and effort on completing more prequal forms.

Type in the recipient details and add a personalized note. You can also choose to exclude the financial portion of your 1Form if you choose to keep your data private.

Contact [asantiaguel@bespokemetrics.com](mailto:asantiaguel@bespokemetrics.com) if you would like to take advantage of this feature.



Menu  
COMPASS Data Control

Share my 1Form

### Share my 1Form

<b>RECIPIENT INFO</b>	<b>1FORM SUBMISSION TO SHARE</b>
Email *	Submitted By Hank Mills
<input type="text" value="austin@bespokemetrics.com"/>	Submitted On July 18th 2024
Recipient Name *	<input checked="" type="checkbox"/> Include Financial Information
<input type="text" value="Austin S"/>	COMPASS takes the security of your data seriously. Please ensure you are sending to the correct contact. Note that you can always remove access at any time.
Company Name *	
<input type="text" value="Bespoke Metrics"/>	
Note to Recipient	
<input type="text" value="Please accept my COMPASS 1Form to be used to prequalify for the BESPOKE POOL RENOVATION Project."/>	
CANCEL	SHARE



**COMPASS**

by Bespoke Metrics