COMPASS
by Bespoke Metrics

Subcontractor User Guide

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Step 1: COMPASS Registration

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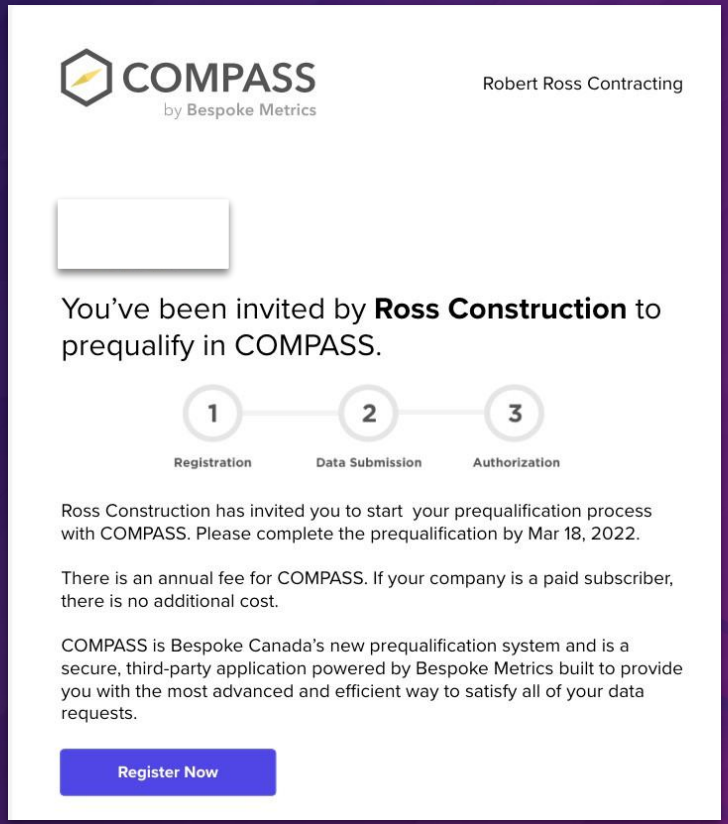
Receiving Your Invitation

1. You will receive an email to register. Click the “Register Now” button

2. To begin Registration enter your email address and press “Next”



COMPASS Registration

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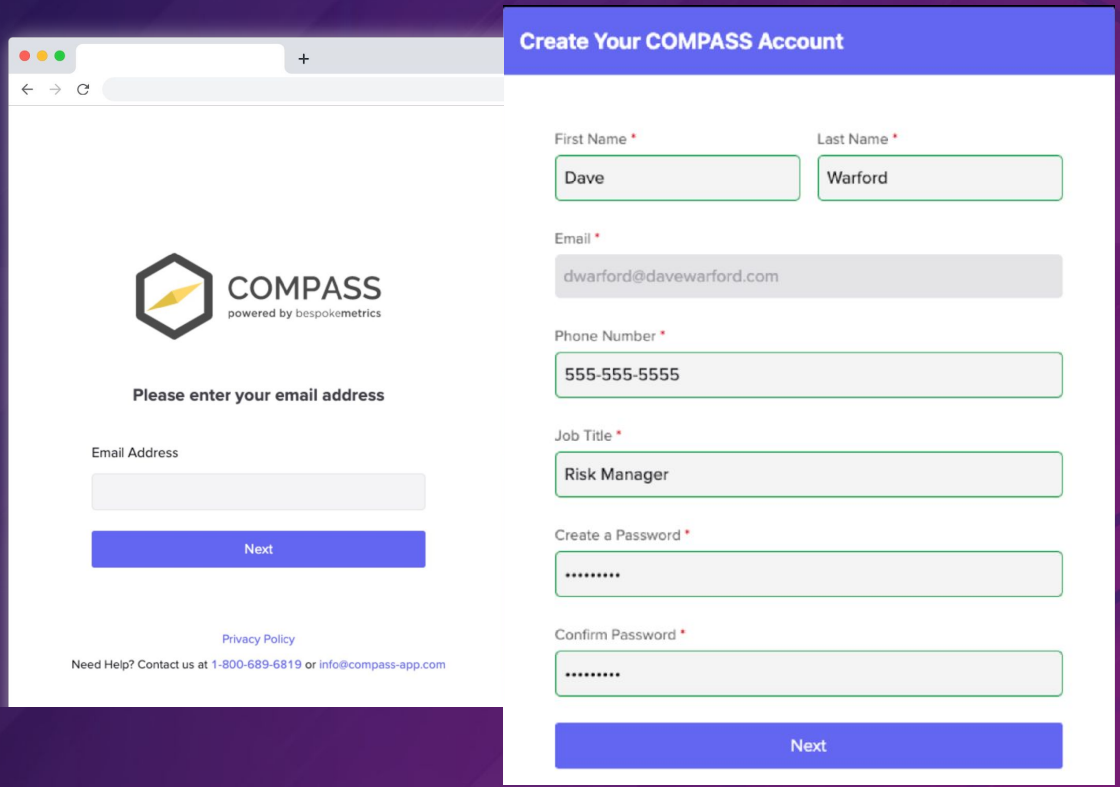
Creating your COMPASS account

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

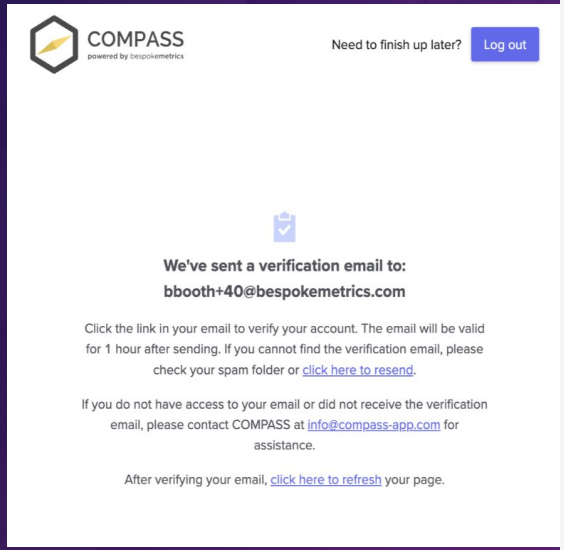
Create your COMPASS account by filling out all the fields and press “Next”.

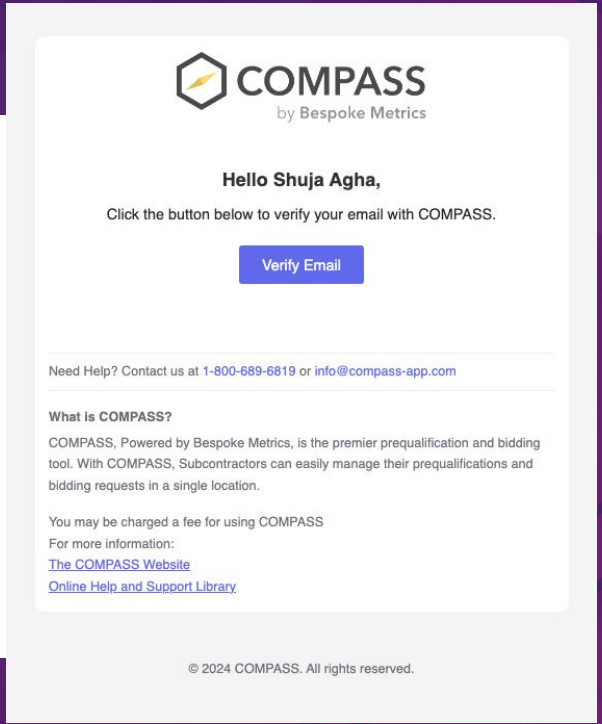


COMPASS Registration

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

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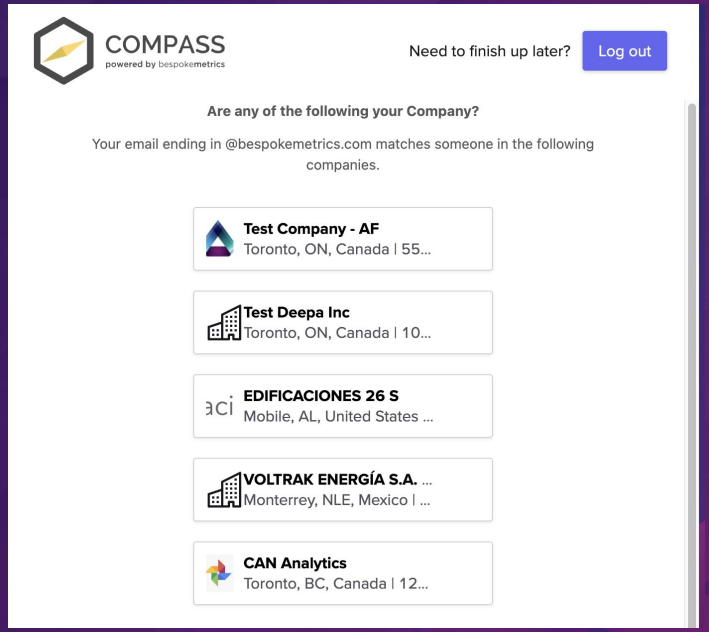
Suggested Companies

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.



COMPASS Registration

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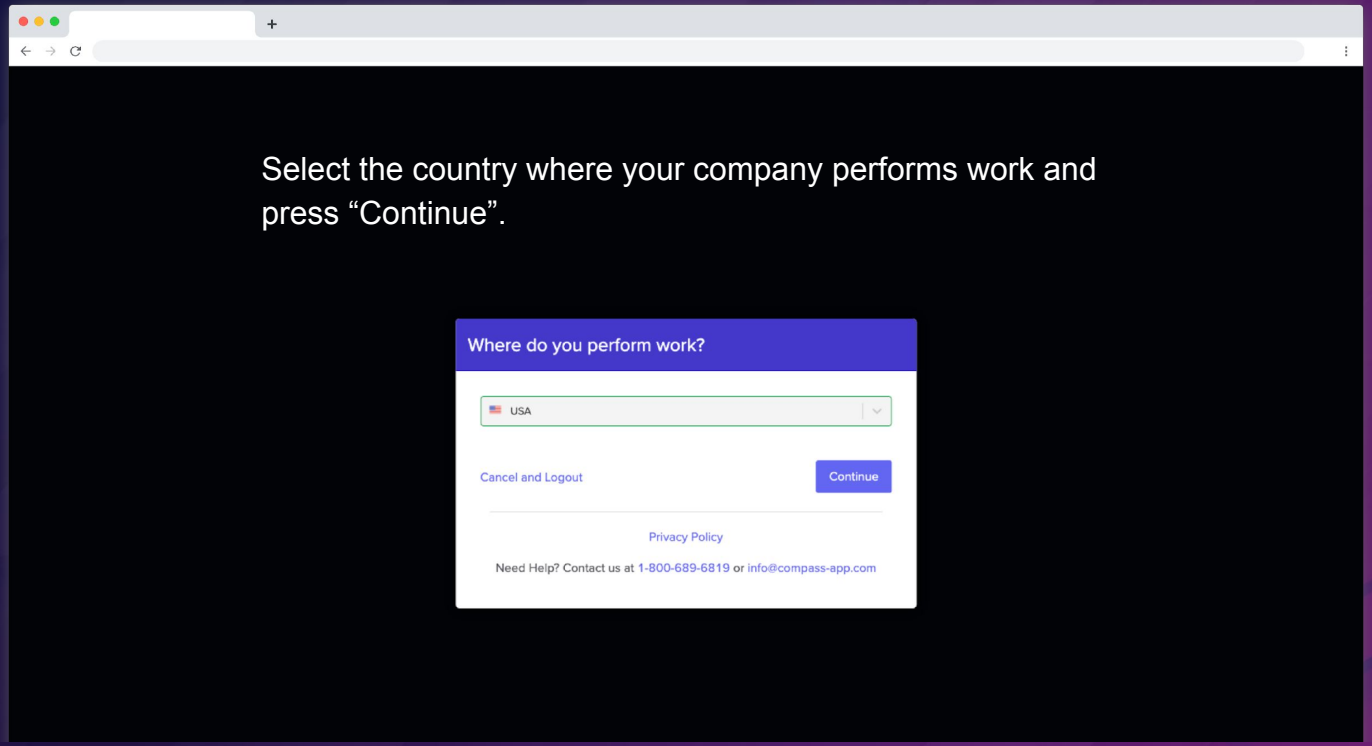
Select Your Country of Operation



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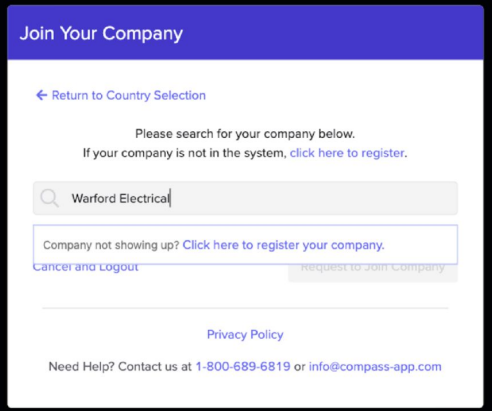
Search for an existing Company Account

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



COMPASS Registration

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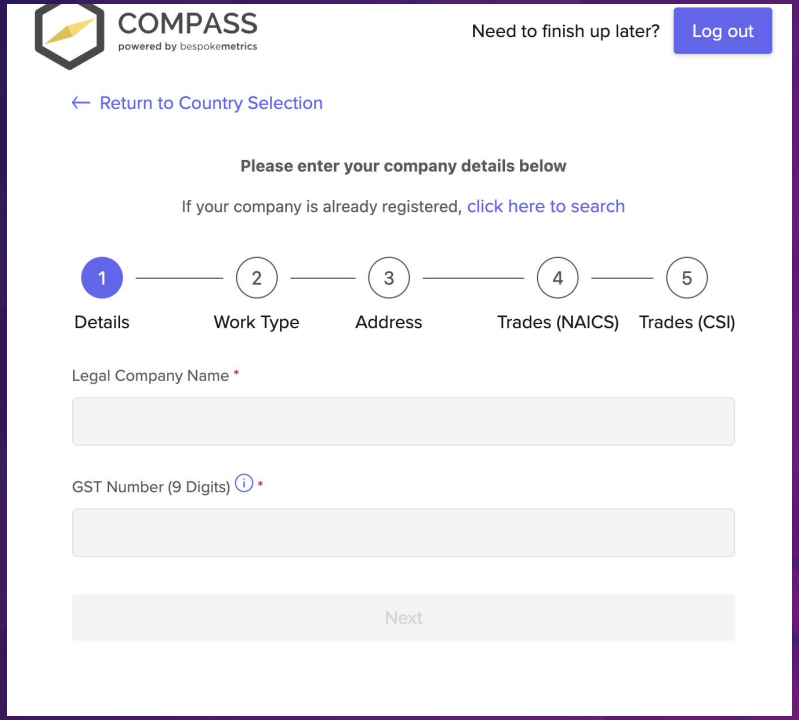
New Company Registration

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.

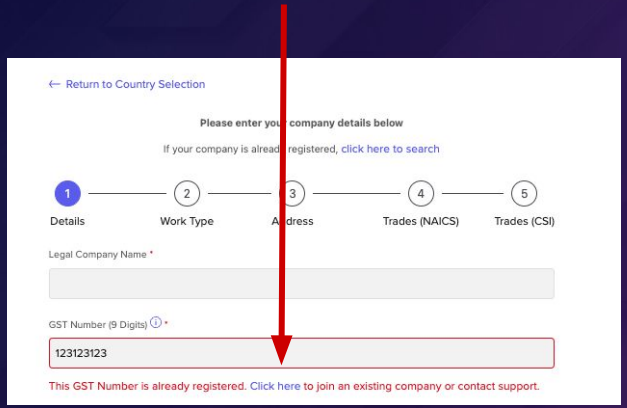
Choose your primary trade (NAICS & CSI Codes) and click “Create My Company”.

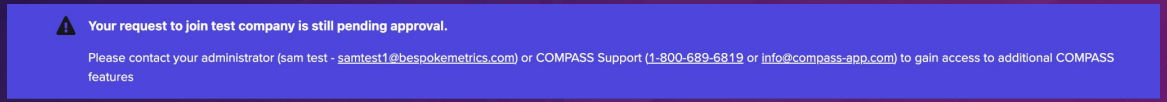


COMPASS Registration

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.





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

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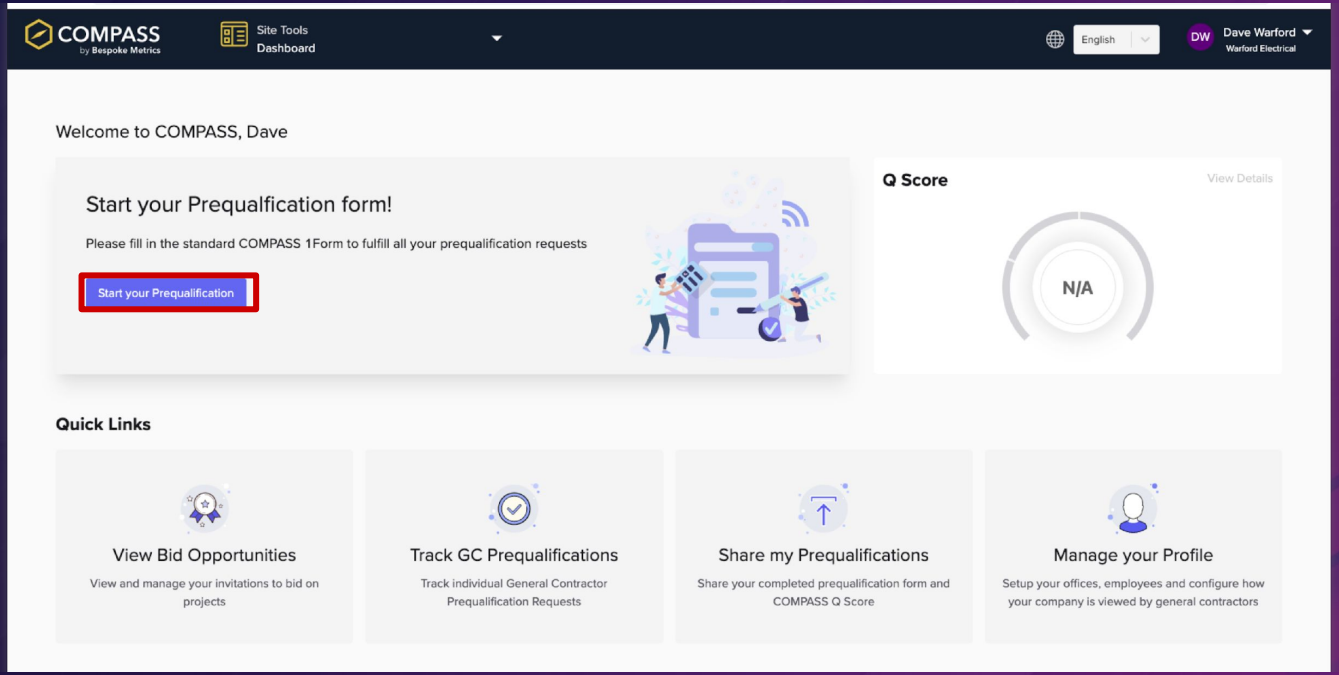
Start Your Prequalification

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.



COMPASS 1Form Submission

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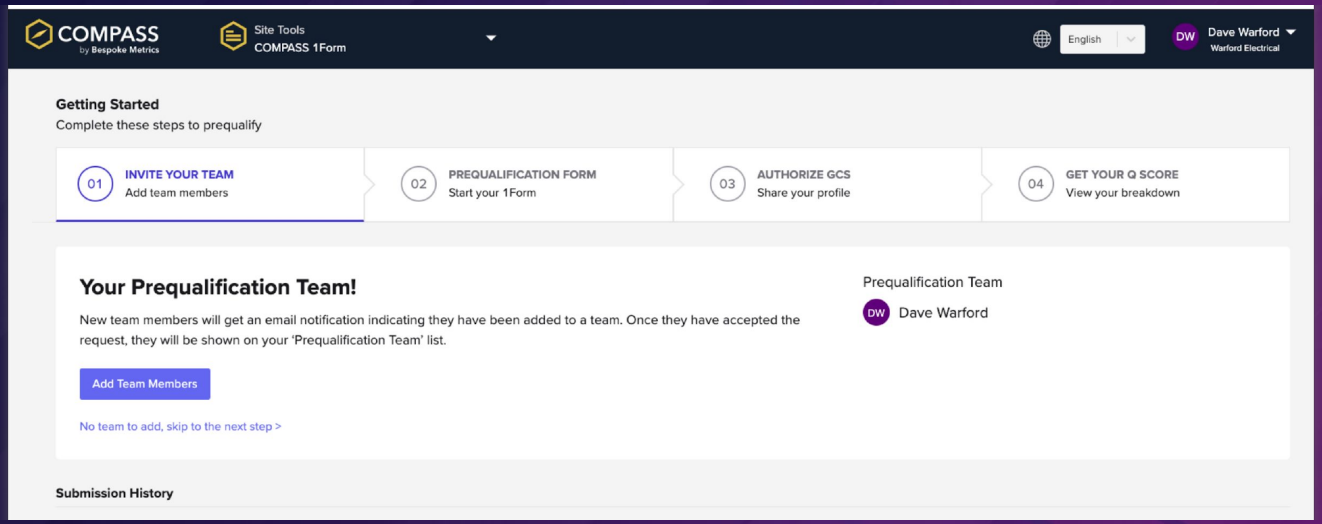
Invite Your Team



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

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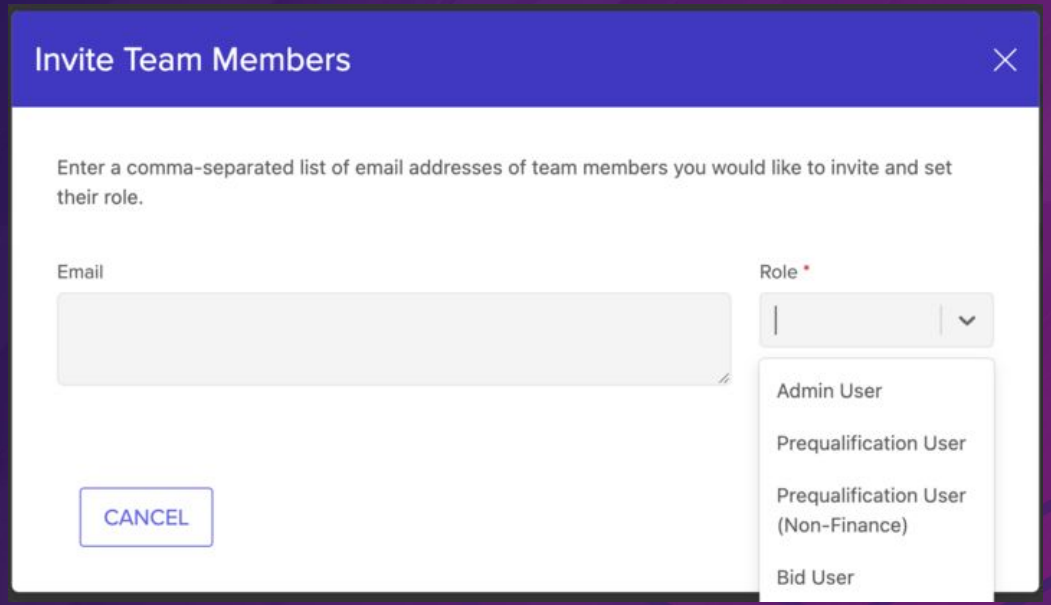
User Roles

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



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

COMPASS 1Form Submission

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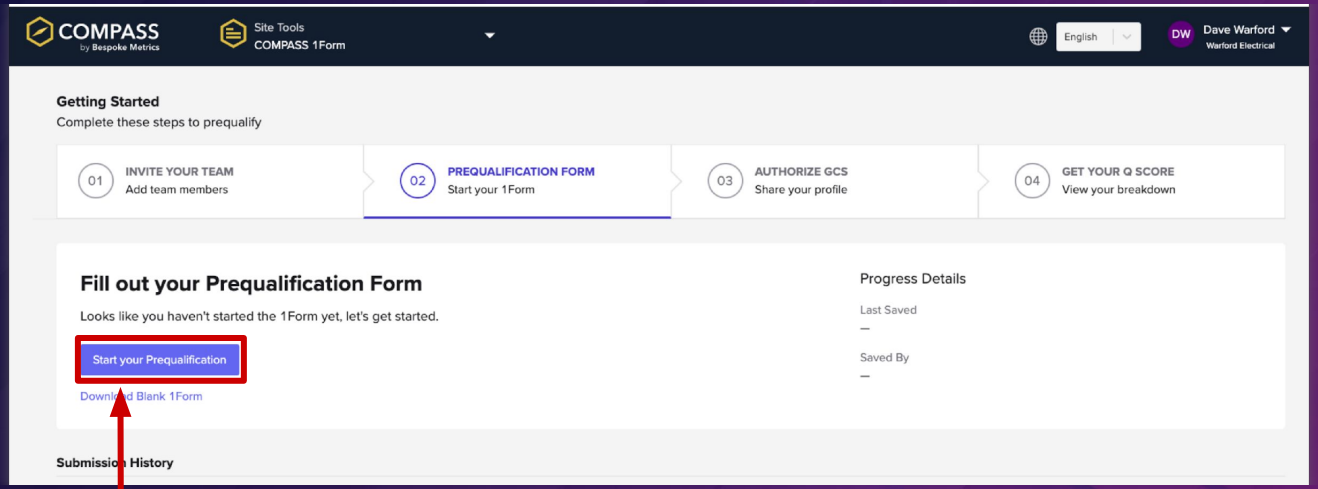
Starting Your 1Form



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

COMPASS 1Form Submission

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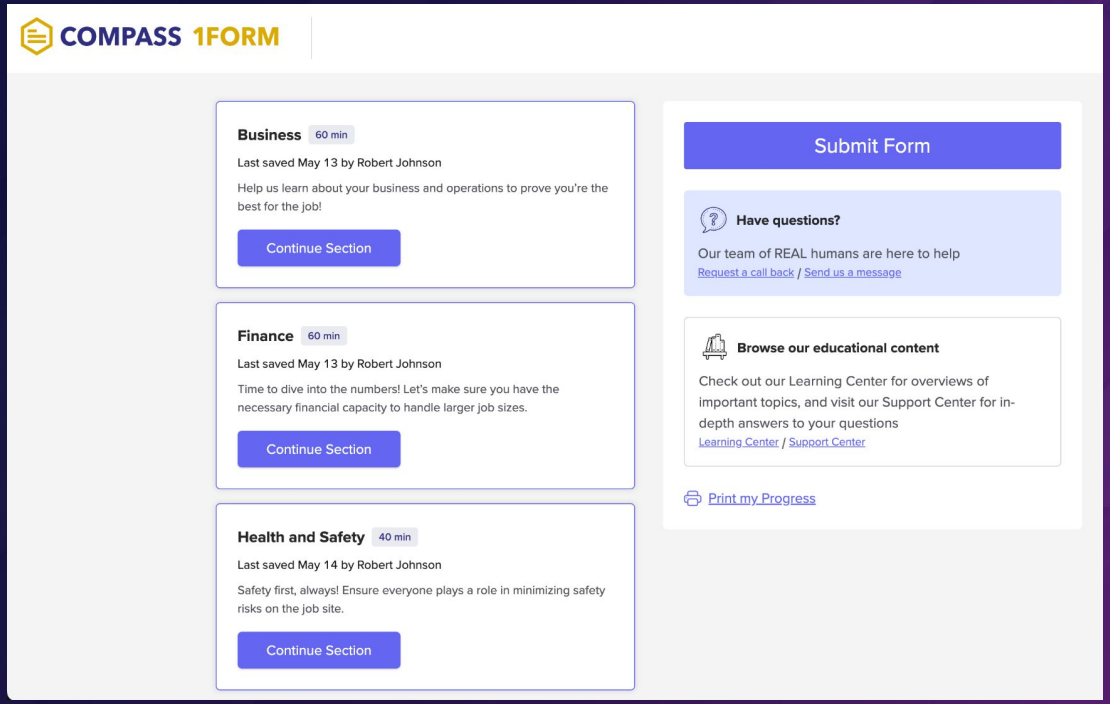
Sections Of The 1Form



- 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

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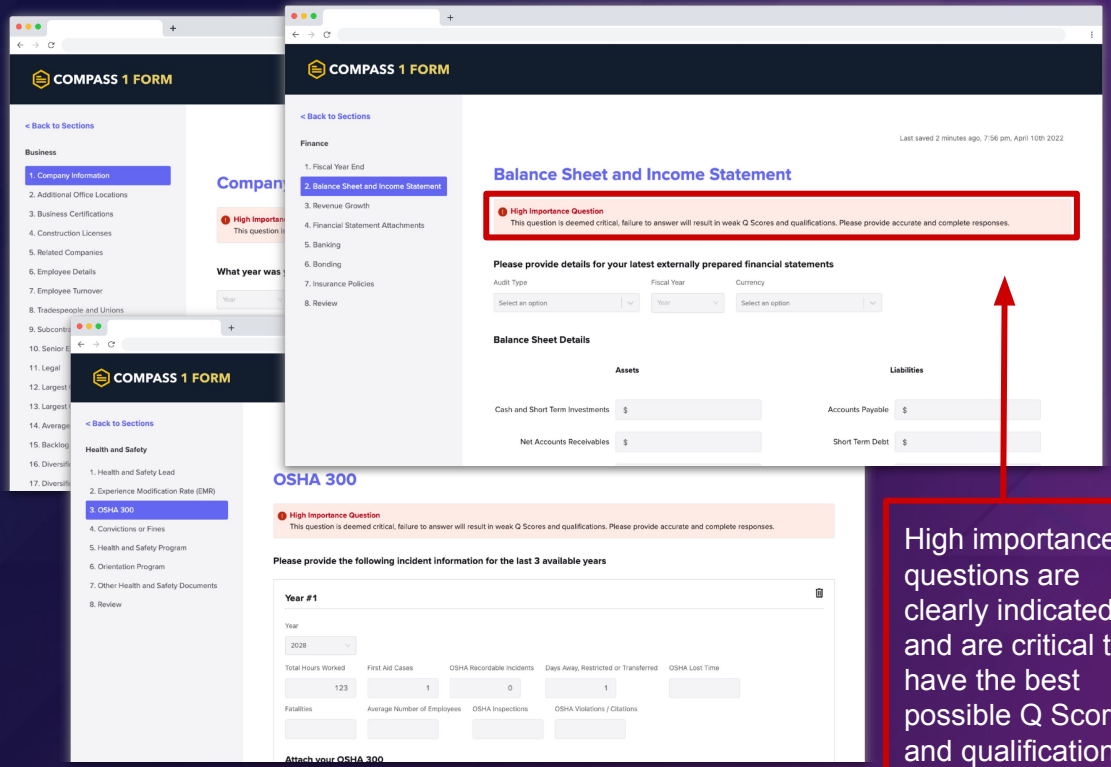
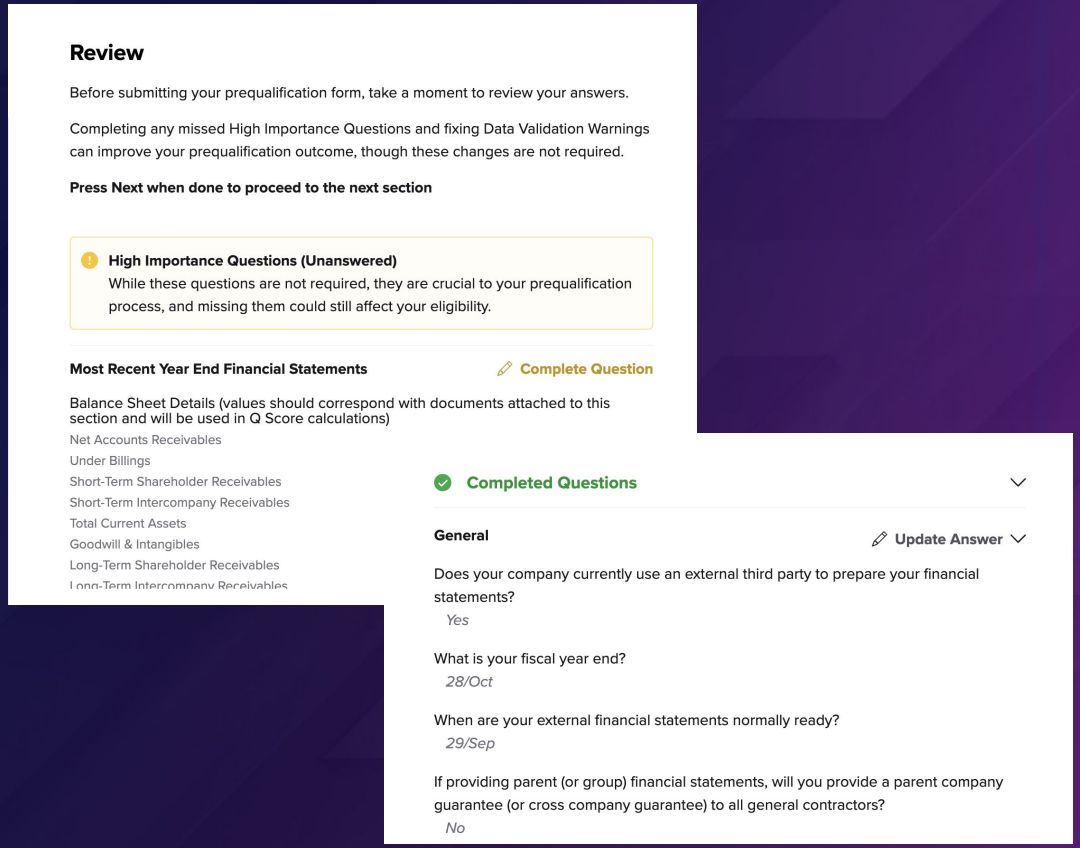


Fill in all of the 1Form questions, and upload documents if required.

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



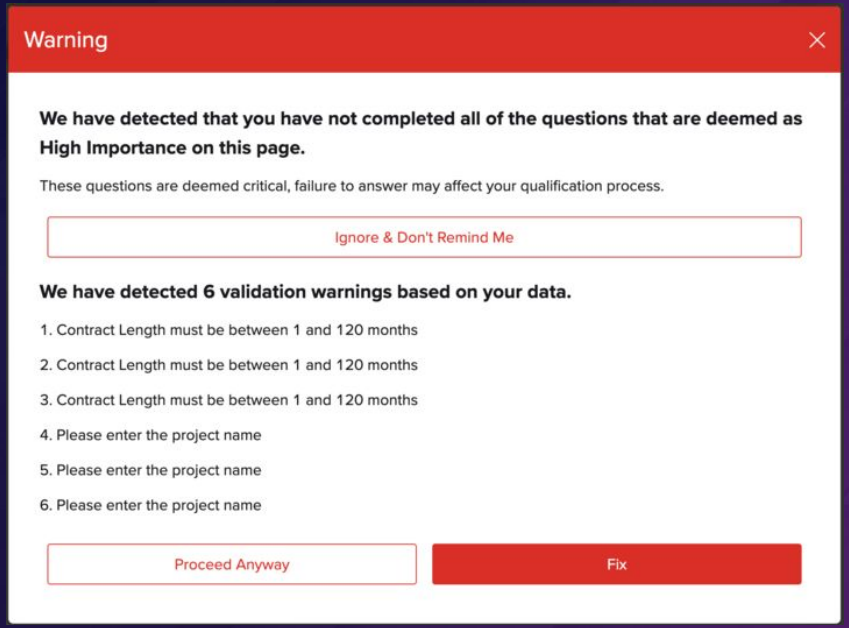
Each section of the 1Form includes a review segment. This feature allows you to check the provided information and identify any incomplete areas, which could negatively impact your prequalification.

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



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

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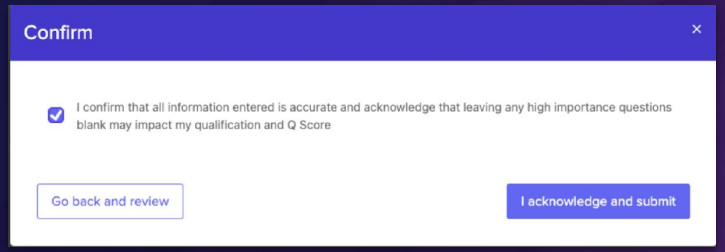
Submitting The 1Form

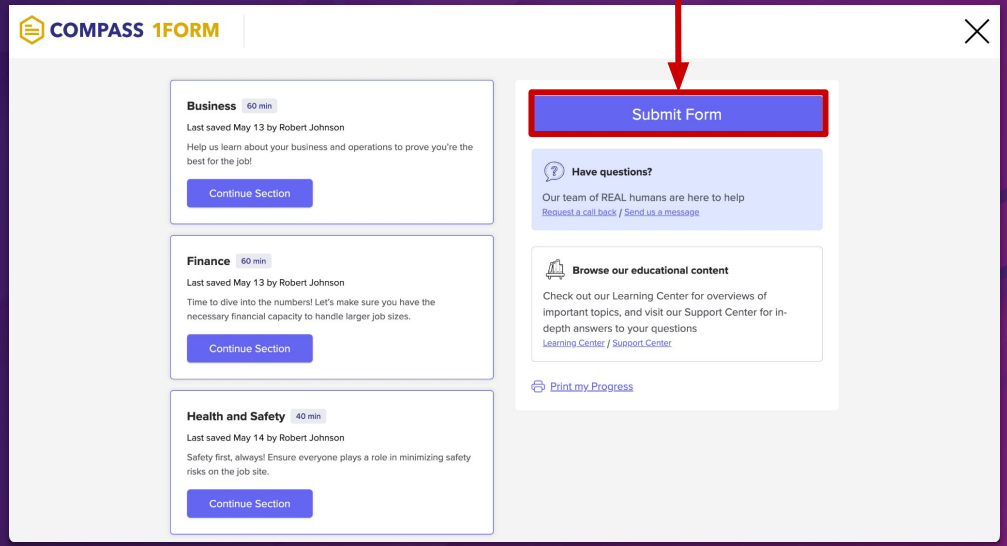
At any time you can exit the 1Form by clicking the Save and Exit button in the top right corner of the page.

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



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

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



Step 3: Regions of Work

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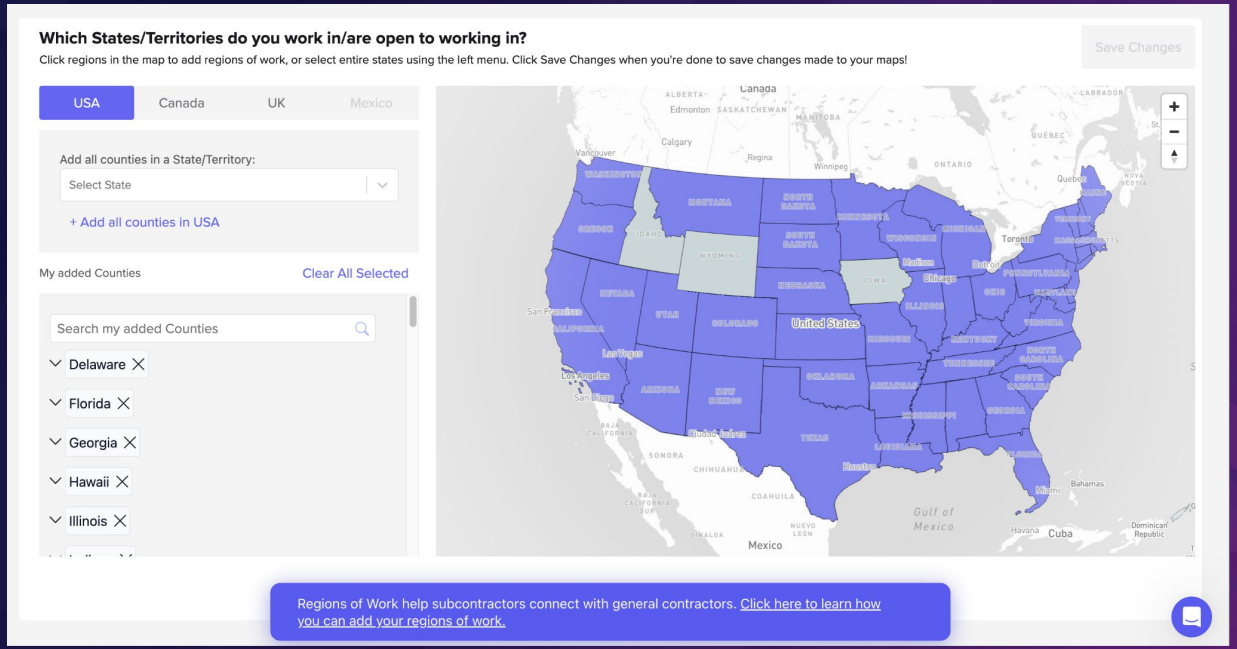

Next, you will be prompted to select the regions that your company operates in.

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

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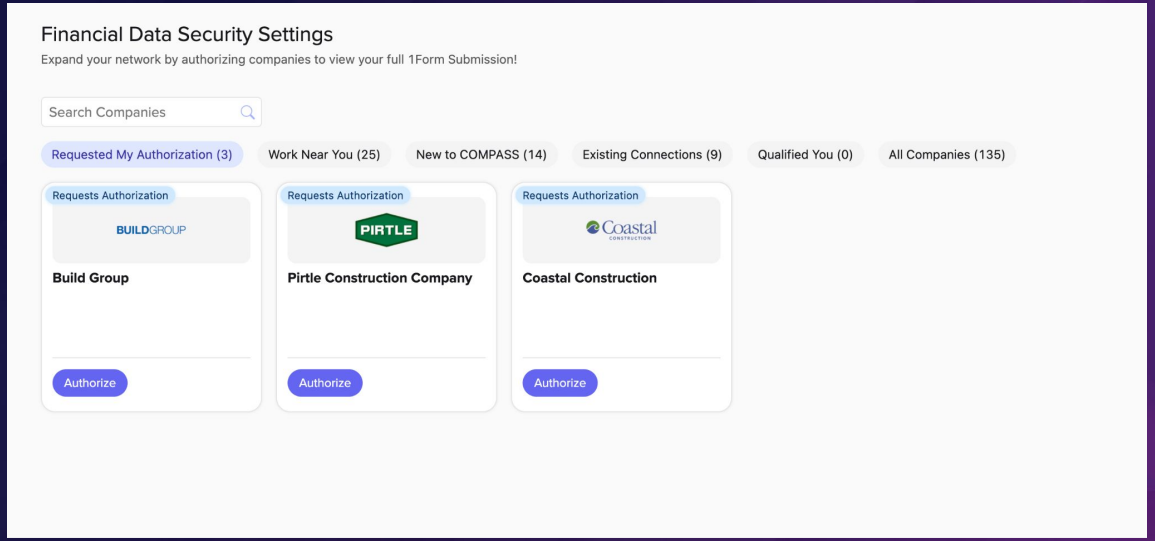

After submission, you will be prompted to select the General Contractors you would like to access your financial information on COMPASS.

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.

Step 4: Q Score and Analytics

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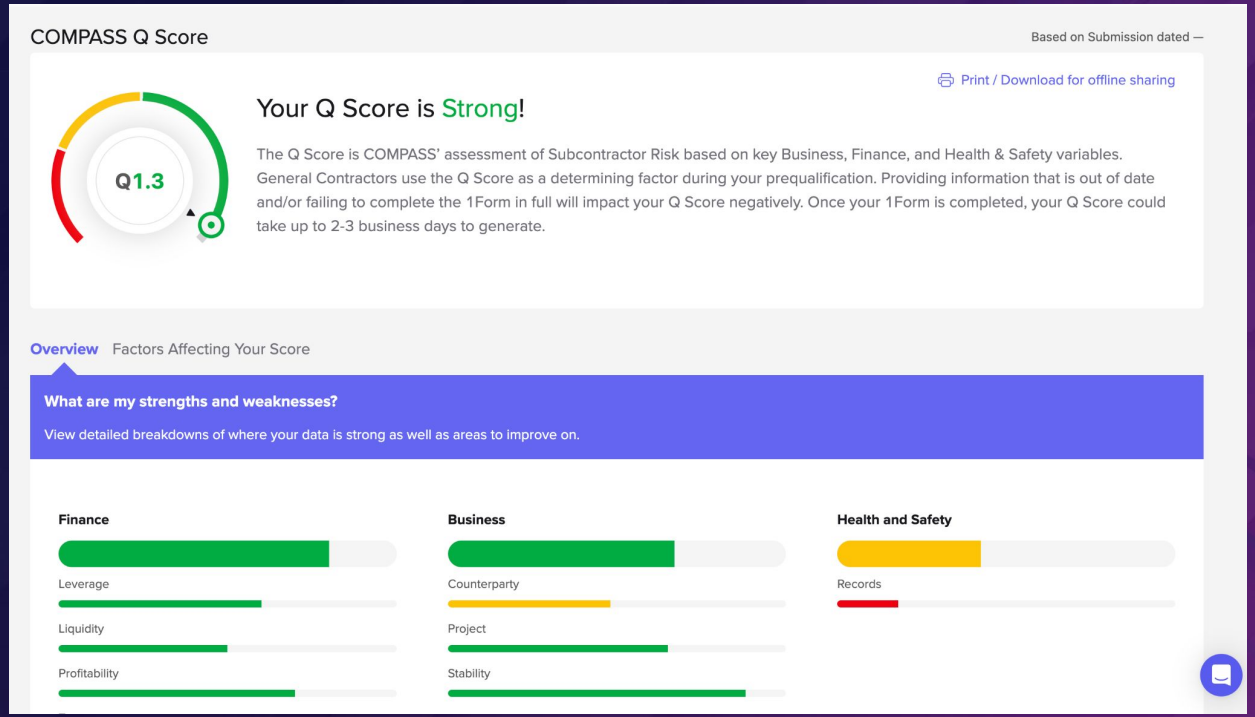


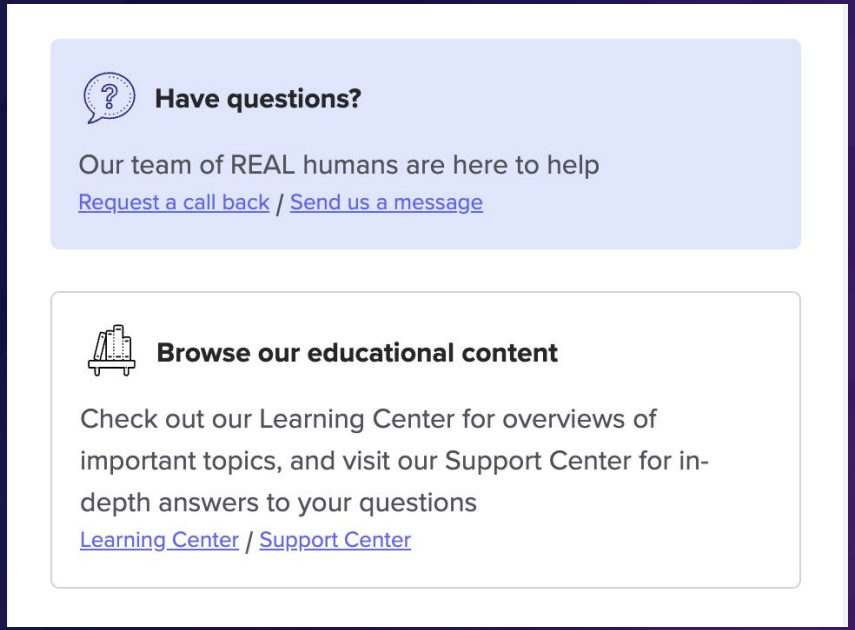
After submitting the 1Form, your submission will be reviewed by the COMPASS team and a Q Score will be assigned and available for download.

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.

Step 5: Support Options



If you have questions or need support you can send a message or request a phone call. 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

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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!

Additional Features

COMPASS Data Control

COMPASS by Bespoke Metrics

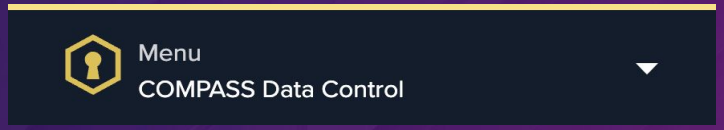
COMPASS is designed to be used as a centralized prequalification platform to address all prequalification requests.

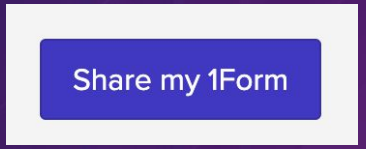
Our industry standard COMPASS 1Form can be used to prequalify with any General Contractor.

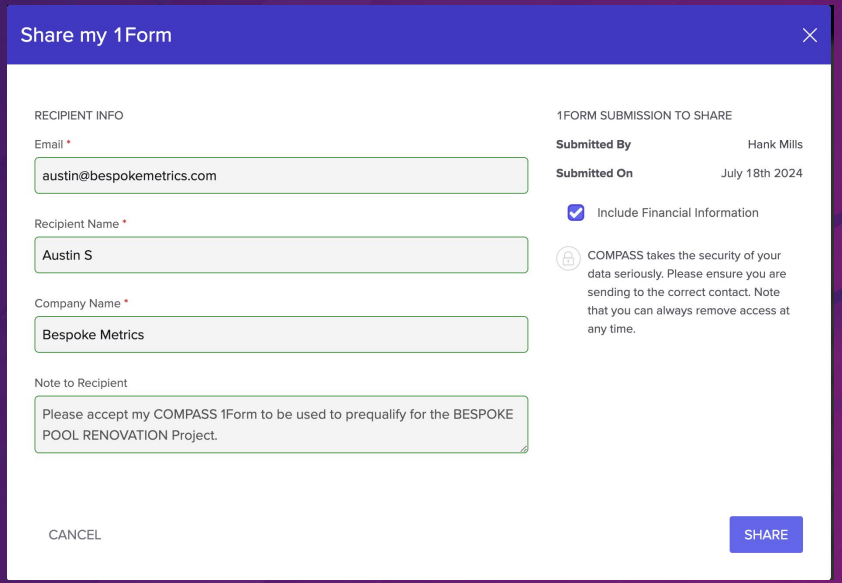
With COMPASS Data Control, securely share your COMPASS 1Form with General Contractors outside of the COMPASS network to save yourself time and effort on completing more prequal forms.

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 if you would like to take advantage of this feature.







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