



HALLOWEEN PRODUCT UPDATE

ONE FORM.
ENDLESS INSIGHTS.



PRODUCT UPDATE

COMPASS' October Features: No Tricks, All Treats!

Hello from the Other Side of Halloween,

We hope you've had a ghoulishly good Halloween and managed to scare away all the project delays and budget overruns! Now that the ghosts and goblins have retreated, it's time to dig into some wicked new COMPASS features that'll make your life a real treat.

October's been a busy month:

- Launched **Custom Project Forms** for more specific Subcontractor reviews
- Rolled out our highly requested **Annual Company Approval Workflows**
- Introduced a **New Role** for reviewers: "Prequal - Non Finance"
- Revamped **1Form to V3** with incredible UI updates and more
- Made **NAICS codes** mandatory for North American users

1. Launched Custom Project Forms

We've listened to your feedback and are excited to introduce Custom Project Forms. These can be easily crafted using our intuitive interface to accommodate specific Subcontractor reviews that our standardized 1Form might not cover. Rest assured, these custom forms will seamlessly integrate with our existing, industry-leading Project Approval workflows.

1-800-689-6819

info@compass-app.com

<http://compass.bespokemetrics.com>





HALLOWEEN PRODUCT UPDATE

ONE FORM.
ENDLESS INSIGHTS.



2. Annual Company Approval Workflows

Navigating annual reviews can be like walking through a haunted maze, but not anymore! We've implemented Annual Company Approval Workflows that allow Risk Managers to create custom review and approval flows. Multiple levels of reviews, role-specific delegations, and a notification system make this feature a dream come true.



HALLOWEEN PRODUCT UPDATE

ONE FORM.
ENDLESS INSIGHTS.



Create New Flow Cancel Save

Details

Flow Name *
Company Approval Flow

Description
Default Company Approval Flow for All Offices

Office(s) *
[Dropdown]

Company Qualification Flow

Ad Hoc Qualifications during Review (Optional)

Allow Ad Hoc Qualifications during Review
Qualifications can be assigned outside of a Company Qualification Flow while the Subcontractor is being reviewed

Review Stage #1 [Edit] [Trash]

Complete stage when: Any review is complete [Dropdown]

Begin typing to search for a user [Search Bar]

+ Add a reviewer

+ Insert Stage

Final Review Stage [Edit]

The final stage of a Company Qualification Flow only allows a single review

3. New Role for Reviewers

Introducing the "Prequal - Non Finance" role, a new user designation created to enable team members who do not have access to financial information to still participate in non-financial reviews, such as those related to Health and Safety.

4. 1Form V3

We've unleashed 1Form V3 into the wild, and it's roaring to go. With a sleeker UI and accelerated form updates, including international versions, 1Form V3 is the kind of update you want haunting your dashboard.



HALLOWEEN PRODUCT UPDATE

ONE FORM.
ENDLESS INSIGHTS.



Business 60 min
Help us learn about your business and operations to prove you're the best for the job!
[Start Section](#)

Finance 60 min
Time to dive into the numbers! Let's make sure you have the necessary financial capacity to handle larger job sizes.
[Start Section](#)

Health and Safety 40 min
Safety first, always! Ensure everyone plays a role in minimizing safety risks on the job site.

[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](#)

5. NAICS Codes Now Mandatory

We've introduced a new requirement for our North American Subcontractors and Suppliers: NAICS codes must now be provided upon registration. This addition enhances your ability to accurately find and classify Subcontractors. Don't worry, we're still collecting CSI codes for Subcontractors as well!



HALLOWEEN PRODUCT UPDATE

ONE FORM.
ENDLESS INSIGHTS.



Small Feature Highlights: Snack-Size Goodies

- **Company Approval Request History Feed:** Keep track of reviews, qualification flows, and initiation times.
- **Mandatory Zip/Postal Code:** Now required when adding additional office info in Company Settings.
- **Tag Removal:** Tags can be axed from a subcontractor profile. No more tag cobwebs!
- **"Requested On" Column:** Now in Workflow tables for all clients.
- **Prequalification Sharing Defaults:** Default sharing is now "off" for new GCs.
- **1Form for Small Screens:** Improvements to make your mobile experience less scary.

Are we working on the right things?

Your feedback drives our roadmap, and we're all ears, eyes, and any other spooky body parts you can think of. Send a note to product@bespokemetrics.com to let us know your thoughts or schedule a demo.

Until next month,

The COMPASS Product Team

ABOUT BESPOKE METRICS:

Offering multi-language concierge service for both subcontractors and general contractors, COMPASS by Bespoke Metrics is a leading prequalification platform that supports industry-wide

1-800-689-6819

info@compass-app.com

<http://compass.bespokemetrics.com>





HALLOWEEN PRODUCT UPDATE

ONE FORM.
ENDLESS INSIGHTS.



data collection, verification, and analytics. Through the COMPASS 1Form, subcontractor data is collected using a unique standardized approach, while giving subcontractors full control of their data. General contractors benefit from the analytics derived from standardized data, enabling them to effectively manage project and default risks.

To learn more about Bespoke Metrics visit compass.bespokemetrics.com, follow us on [Facebook](#), [LinkedIn](#), and [Instagram](#) or contact us at info@compass-app.com or 1-800-689-6819 to schedule a demo.

1-800-689-6819

info@compass-app.com

<http://compass.bespokemetrics.com>

