

How to Submit a Draw Request



Learn how to accurately submit your construction draw request through the Capstone online portal. This guide walks you through uploading documentation, specifying line item details, and confirming the necessary reimbursement requirements to ensure timely funding.

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Navigate to <https://draw-request-capstone.netlify.app/> and fill out loan information

A screenshot of a web form for submitting a draw request. The form is titled 'Loan Number * starts with 2, six digits long' and contains several input fields. The 'Loan Number' field is filled with '230832'. Below this is a section for 'PROPERTY ADDRESS' with a note: 'Enter the address on the Scope of Work — not your personal or mailing address.' The 'Property Street Address *' field is filled with '1620 N 82nd Pl'. The 'Property Unit # optional' field is empty, with a placeholder 'Unit, Suite, Apt #'. The 'Property City *' field is filled with 'Scottsdale' and the 'Property State *' field is filled with 'Arizona'. The 'Property ZIP Code *' field is filled with '85257'. The 'Draw Number *' field is a dropdown menu with 'Draw 1' selected. A 'Continue →' button is at the bottom right of the form.

Loan Number * starts with 2, six digits long

230832

PROPERTY ADDRESS

Enter the address on the Scope of Work — not your personal or mailing address.

Property Street Address *

1620 N 82nd Pl

Property Unit # optional

Unit, Suite, Apt #

Property City *

Scottsdale

Property State *

Arizona

Property ZIP Code *

85257

Draw Number *

Draw 1

Continue →

2 Click this dropdown and select Draw number

PROPERTY ADDRESS
Enter the address on the **Scope of Work** — not your personal or mailing address.

Property Street Address *
1620 N 82nd Pl

Property Unit # optional
Unit, Suite, Apt #

Property City * **Property State ***
Scottsdale Arizona

Property ZIP Code *
85257

Draw Number *
Draw 1

Continue →

3 Click "Continue →"

PROPERTY ADDRESS
Enter the address on the **Scope of Work** — not your personal or mailing address.

Property Street Address *
1620 N 82nd Pl

Property Unit # optional
Unit, Suite, Apt #

Property City * **Property State ***
Scottsdale Arizona

Property ZIP Code *
85257

Draw Number *
Draw 1

Continue →

4 Click this file field and upload scope of work.

Capstone Financial
Draw Request Form

STEP 2 OF 4

Draw Summary

Upload your scope of work and provide the total amount for this draw request.

Upload Updated Scope of Work *

The Scope of Work must be in **Excel format** (.xlsx or .xls) and use the **Capstone Financial Scope of Work template**. Submissions in any other format will be rejected.

Click to upload or drag & drop
Excel file in Capstone format only (.xlsx or .xls)

Column matching draw request number must be updated to match request.

Total Amount Requested for Draw (\$) *

0.00

Full Amount on Scope of Work must be requested.

Notes / Comments optional

Any additional information about this draw request...

5 Click the "0.00" field and enter the total draw amount

Capstone Financial
Draw Request Form

STEP 2 OF 4

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✓ Scope of Work - Template Update (3) (002).xlsx

Total Amount Requested for Draw (\$) *

0.00

Full Amount on Scope of Work must be requested.

Notes / Comments optional

Any additional information about this draw request...

← Back **Continue →**

6 Click "Continue →"

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The Scope of Work must be in **Excel format (.xlsx or .xls)** and use the **Capstone Financial Scope of Work template**. Submissions in any other format will be rejected.

 Click to upload or drag & drop
Excel file in Capstone format only (.xlsx or .xls)

Column matching draw request number must be updated to match request.

✓ Scope of Work - Template Update (3) (002).xlsx

Total Amount Requested for Draw (\$) *

147000

Full Amount on Scope of Work must be requested.

Notes / Comments optional

Any additional information about this draw request...

← Back **Continue →**

7 Click "+ Add Another Line Item" and individually add each item on the scope of work

STEP 3 OF 4

Line Item Details

Add each line item you are requesting reimbursement for. You can add up to 52 items.

Note: Do not include any line item that was already submitted on a previous draw request. Only add items you are requesting reimbursement for on this draw.

Would you like to use ONE general contractor's license for multiple line items? *

If Yes, upload the license here once and you'll be able to apply it to each line item that requires one.

☐ Yes ☐ No

+ Add Another Line Item

← Back **Review & Submit →**

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Under each line item click the "0.00" field and enter the amount of each line item according to scope of work

The screenshot shows the 'Capstone Financial Draw Request Form'. At the top, there are radio buttons for 'Yes' and 'No'. Below this is 'Line Item 1'. A dropdown menu for 'Select Line Item' is set to '1. Excavation / Demo / Sitework'. The 'Line Item Amount (\$)' field contains '0.00' and is highlighted with an orange circle. Below the amount field is a warning: 'Enter dollar amount you are requesting below. Line Item must be fully complete to request amount. No partial payments will be granted.' The 'Proof of Payment Method' section has a yellow box stating 'Must be paid in full'. Below this are checkboxes for 'Invoice', 'Receipt', 'Check', and 'Zelle'. At the bottom is an 'Upload Permit for Item' section with a dashed box and a document icon.

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Click whichever form to show proof of payment for selected line item

This screenshot shows the same form as above, but with the 'Receipt' checkbox under 'Proof of Payment Method' highlighted with an orange circle. The 'Line Item Amount (\$)' field now contains '9000'. The 'Upload Permit for Item' section now includes the text 'Upload Permit PDF or Image' below the document icon. At the bottom of the form is a blue button labeled '+ Add Another Line Item'.

10 Upload pdf or image of proof of payment selected

Draw Request Form

payment method selected

Proof of Payment Method *

⚠ Must be paid in full

Select all that apply

☐ Invoice ☒ Receipt ☐ Check ☐ Zelle

Receipt – Proof of Payment *

⚠ Must show paid in full

Upload Receipt
PDF or image - Multiple files allowed

Upload Permit for Item *

Upload Permit
PDF or image

+ Add Another Line Item

11 Some line items will require a permit uploaded

Select all that apply

☐ Invoice ☒ Receipt ☐ Check ☐ Zelle

Receipt – Proof of Payment *

⚠ Must show paid in full

Upload Receipt
PDF or image - Multiple files allowed

✓ Payment Confirmation \$8,358.10.pdf

Upload Permit for Item *

Upload Permit
PDF or image

+ Add Another Line Item

← Back Review & Submit →

- 12 Add another line item for each item on scope of work requiring reimbursement

- 13 Click "Review & Submit" once all line items and proof of payment have been added

The screenshot displays a web form for reimbursement. At the top, there are four tabs: 'Invoice', 'Receipt' (which is selected and highlighted in blue), 'Check', and 'Zelle'. Below the tabs, the section 'Receipt – Proof of Payment *' is visible, with a warning icon and text 'Must show paid in full'. This section contains a dashed box for 'Upload Receipt' with a document icon and the text 'PDF or image - Multiple files allowed'. Below this, a green checkmark and text confirm 'Payment Confirmation \$8,358.10.pdf'. The next section is 'Upload Permit for Item *', also with a dashed box for 'Upload Permit' (PDF or image) and a green checkmark confirming 'Payment Confirmation \$8,358.10.pdf'. A blue button labeled '+ Add Another Line Item' is positioned below these sections. At the bottom right, a dark blue button labeled 'Review & Submit' with a right-pointing arrow is circled in orange, indicating the next step. A 'Back' button is also present to the left of the 'Review & Submit' button.

14 Click each of the boxes to agree to terms of the draw

☒ I have read the reimbursement guidelines and understand how the draw process is outlined.
✓ I UNDERSTAND

☒ The appropriate draw column number on the Scope of Work must be updated with the item detail I am requesting for my draw in order for my draw to be processed.
✓ I UNDERSTAND

☒ Draws take 7–10 business days once all required documentation is provided. A delay in receiving the required documents outlined in the guidelines will delay the funding of my draw.
✓ I UNDERSTAND

☒ Reimbursement amount approved is based on work found to be completed at inspection, not necessarily amount requested.
✓ I UNDERSTAND

☒ The amount I request per line item may not exceed the amount on the approved Scope of Work. If my Scope of Work budget has changed, I will email finance@capstonefi.com before submitting. Any amount requested above what was approved will be reduced to the approved amount; excess should be allocated to contingency if applicable.
✓ I UNDERSTAND

☐ My property taxes and insurance are paid current. I understand both will be verified, and if either is unpaid my draw funding will be delayed.
✓ I UNDERSTAND

⚠ By submitting you confirm all information is accurate. Proof of payment must show paid in full. No partial payments will be granted.

15 Click "Submit Draw Request"

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← Back

Submit Draw Request ✓

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You will receive an email confirmation and Capstone Financial will reach out to you