

Fourge Portal Finance Summary

Role cheat sheet, finance lanes, and data flow for team, client, and subcontractor users.

1. Executive Summary

The finance area is split into three separate role lanes. Team gets the full finance hub, clients get invoice viewing only, and subcontractors get invoice submission plus purchase-order review.

TEAM

Main route: /invoices
Handles client invoices, expenses, subcontractor invoices, and POs.

CLIENT

Main route: /my-invoices
Can view invoices, filter by company, and download PDFs.

SUBCONTRACTOR

Main routes:
/my-invoices-sub and /my-purchase-orders
Can submit invoices to Fourge and approve POs.

2. Role-by-Role Cheat Sheet

ROLE	MAIN ROUTES	CAN DO	CANNOT DO
Team	/invoices	Client invoices, expenses, POs, subcontractor invoices, paid status, PDFs, email sends	No major finance restrictions in UI
Client	/my-invoices	View invoices, filter by company, download invoice PDFs	No expenses, no edits, no POs, no subcontractor finance tools
Subcontractor	/my-invoices-sub /my-purchase-orders	Submit invoices, view status, download receipt after paid, approve POs	No team finance overview, no client billing control

3. Core Data Models

- invoices + invoice_items: Fourge bills clients.
- expenses: Fourge internal finance records.
- subcontractor_invoices + subcontractor_invoice_items: subcontractors bill Fourge.
- subcontractor_payments + subcontractor_po_items: Fourge sends purchase orders to subcontractors.
- tasks and submissions connect work records to invoice line items.

4. System Flow

CLIENT BILLING FLOW

Approved work reaches tasks.status = client_approved.
Team finance loads uninvoiced tasks and revisions and builds invoice line items.
Invoice is saved, PDF is generated, and email is sent to the client.
Later team marks the invoice paid.



EXPENSE FLOW

Team logs internal expenses and can attach receipt files.
Expenses feed overview charts, yearly finance summaries, and profit calculations.



SUBCONTRACTOR INVOICE FLOW

Subcontractor creates an invoice from completed approved tasks assigned to them.
Fourge reviews the invoice, marks it paid, and can send a receipt PDF back.



PURCHASE ORDER FLOW

Team creates a PO for a subcontractor, optionally linked to project tasks.
Subcontractor reviews and approves the PO from their own portal view.



5. Status Logic

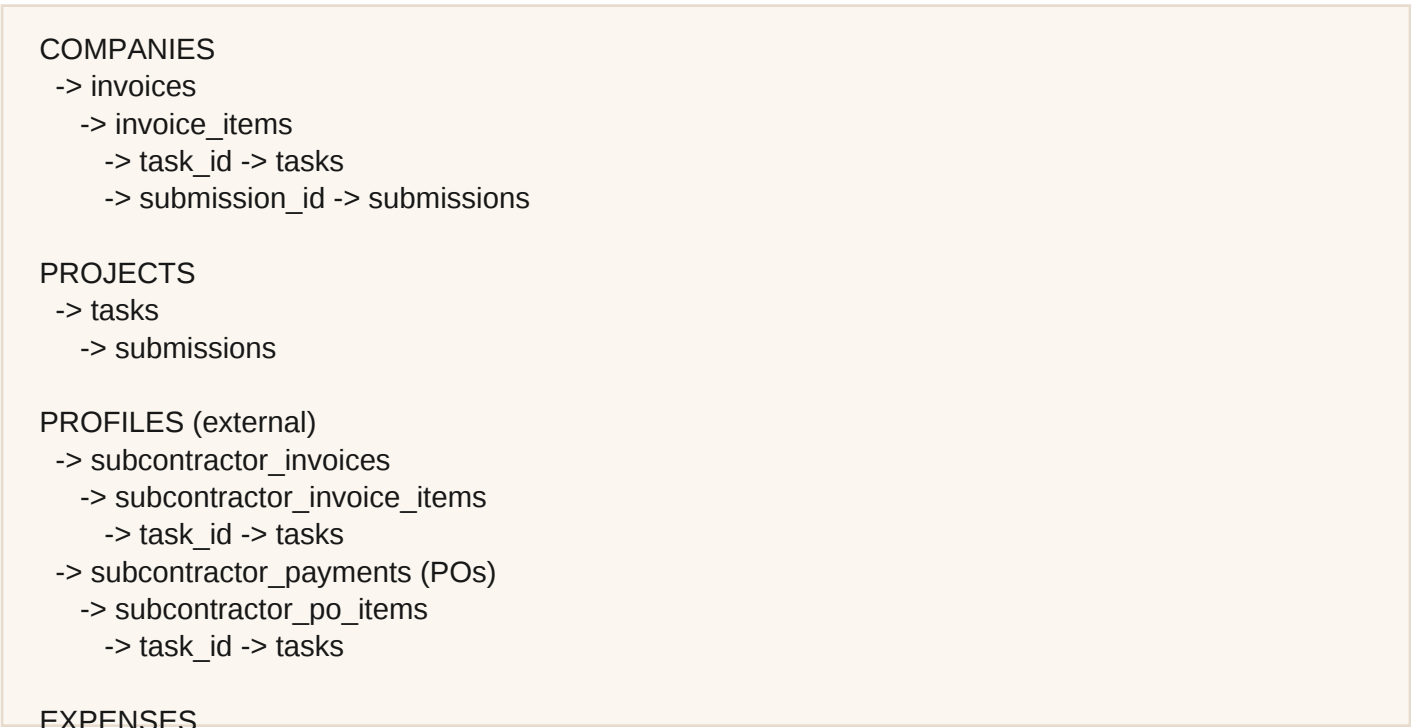
- Client invoice: draft -> sent -> paid
- Subcontractor invoice: draft -> submitted -> paid
- Purchase order: draft -> sent -> approved -> ready_to_pay -> paid
- Cancelled is the exit state for a PO.

6. Key Business Rules

- Client invoices only pull approved, uninvoiced work.
- Tasks and revisions are marked invoiced after invoice creation.
- Deleting a team invoice rolls linked invoice flags back.
- Team invoice status changes also push task status changes.
- Revision billing rule: R00 = new work, R01 = free, R02+ = billable increments.
- Subcontractor invoices are created by the external user and then reviewed/paid by team.
- POs are created by team and approved by the subcontractor.

7. Database Relationship Chart

Simple relationship map:



8. Quick Route Map

SURFACE	ROUTE	USER
Finance Hub	/invoices	Team
Client Invoices	/my-invoices	Client
Subcontractor Invoices	/my-invoices-sub	External
Create Subcontractor Invoice	/my-invoices-sub/new	External
Purchase Orders	/my-purchase-orders	External

Generated from the current portal codebase summary on June 3, 2026.