



Finance Ops

Invoicing, accounts receivable and
expense reports — built for how your
company actually bills.

Invoices

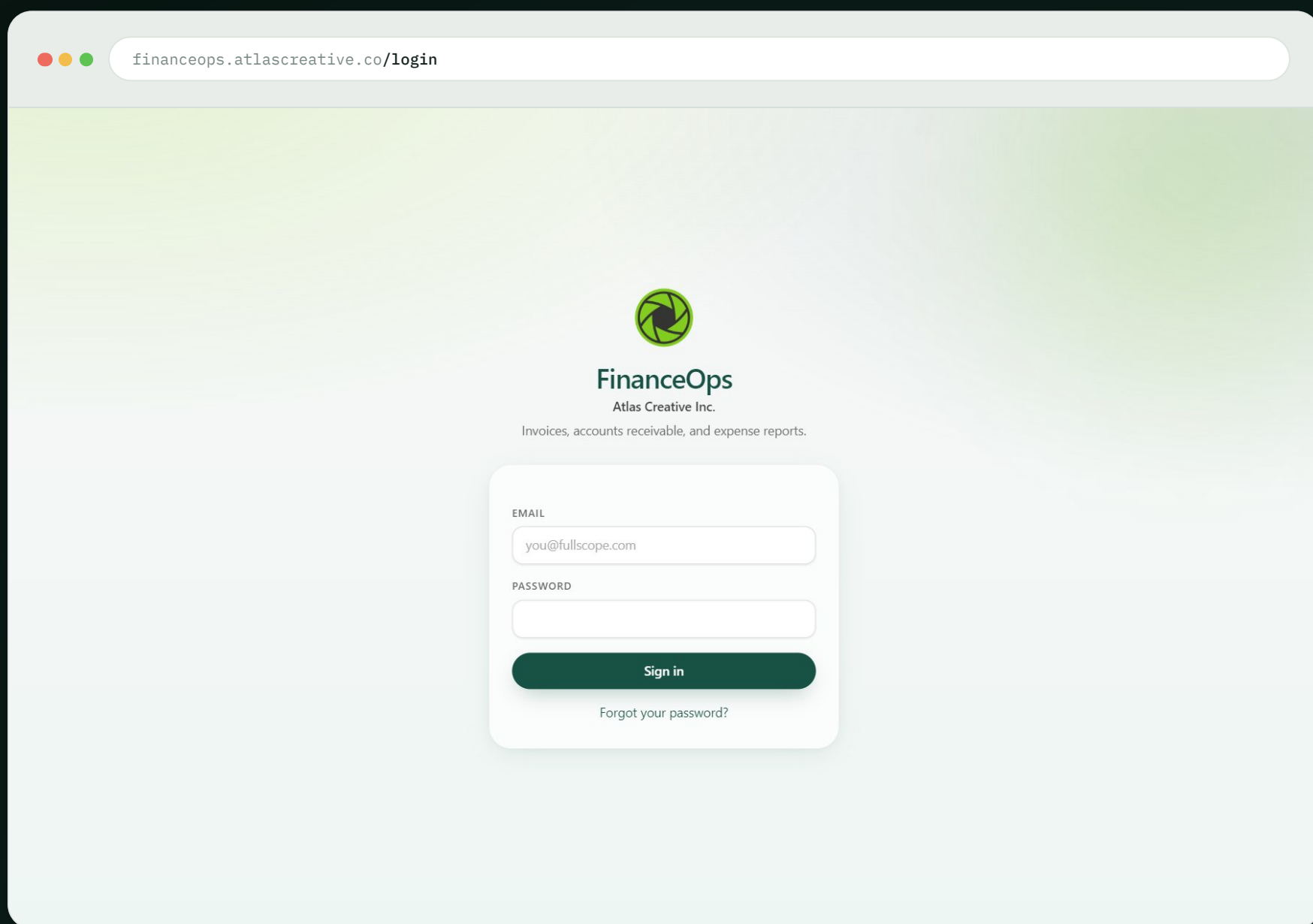
Receivables

Expense reports

 LOCKED BY DEFAULT

Your books, behind a door.

There is no public way in. Every page sits behind a sign-in, and an account only exists because you created it — nobody invites themselves.



A screenshot of a web browser window showing the login page for FinanceOps. The browser's address bar displays the URL `financeops.atlascreative.co/login`. The page has a light green gradient background. In the center, there is a circular logo with a camera shutter design. Below the logo, the text "FinanceOps" is displayed in a bold, dark green font, followed by "Atlas Creative Inc." in a smaller, lighter green font. Underneath, a line of text reads "Invoices, accounts receivable, and expense reports." Below this, there is a white rounded rectangle containing the login form. The form has two input fields: "EMAIL" with the placeholder text "you@fullscope.com" and "PASSWORD". Below the password field is a dark green "Sign in" button. At the bottom of the form, there is a link that says "Forgot your password?".

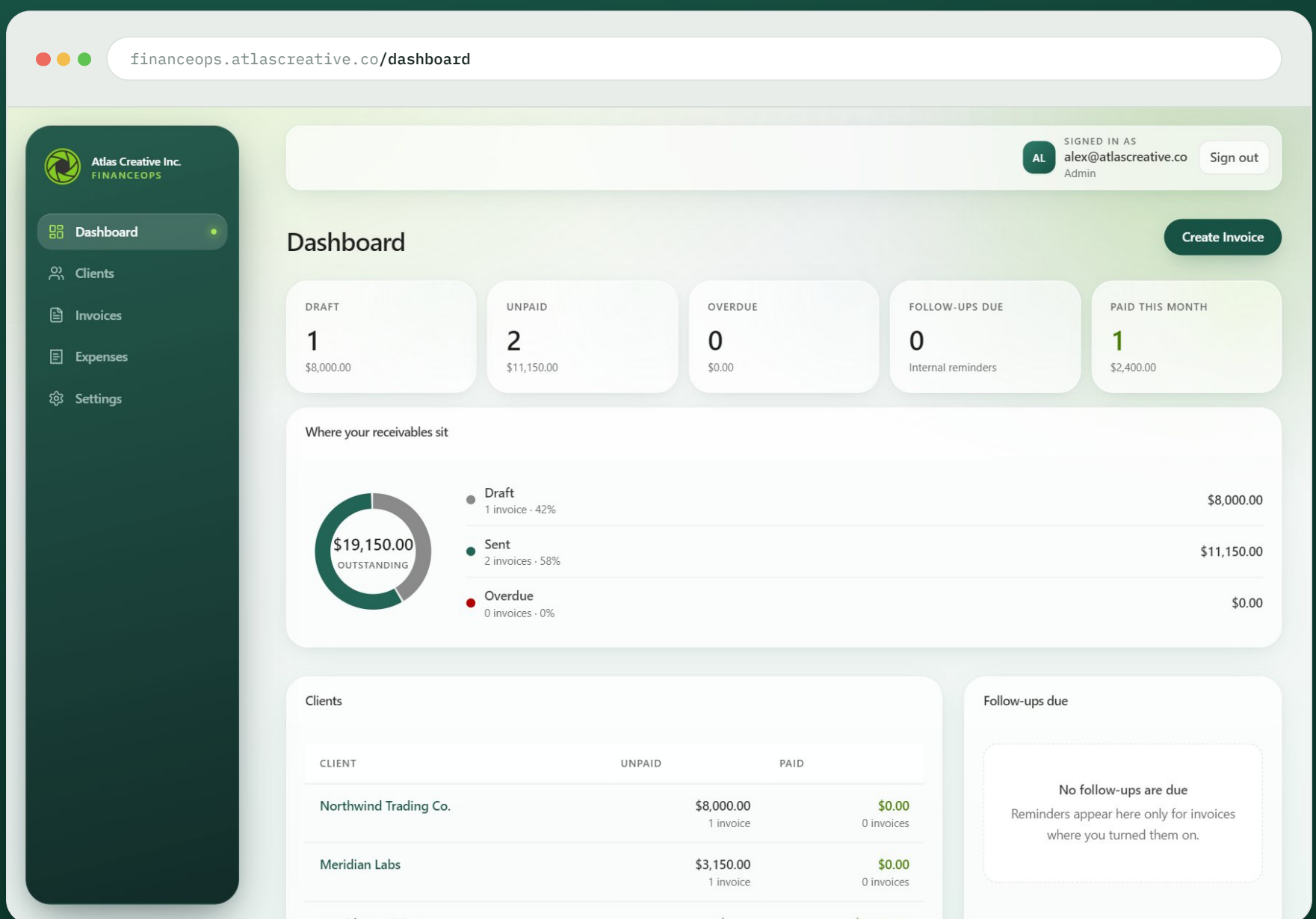


AT A GLANCE

The whole month, on one screen.

2

Draft, unpaid and overdue counted for you, what is outstanding drawn as a shape, and the follow-ups that are due listed beside it. Your own money only.

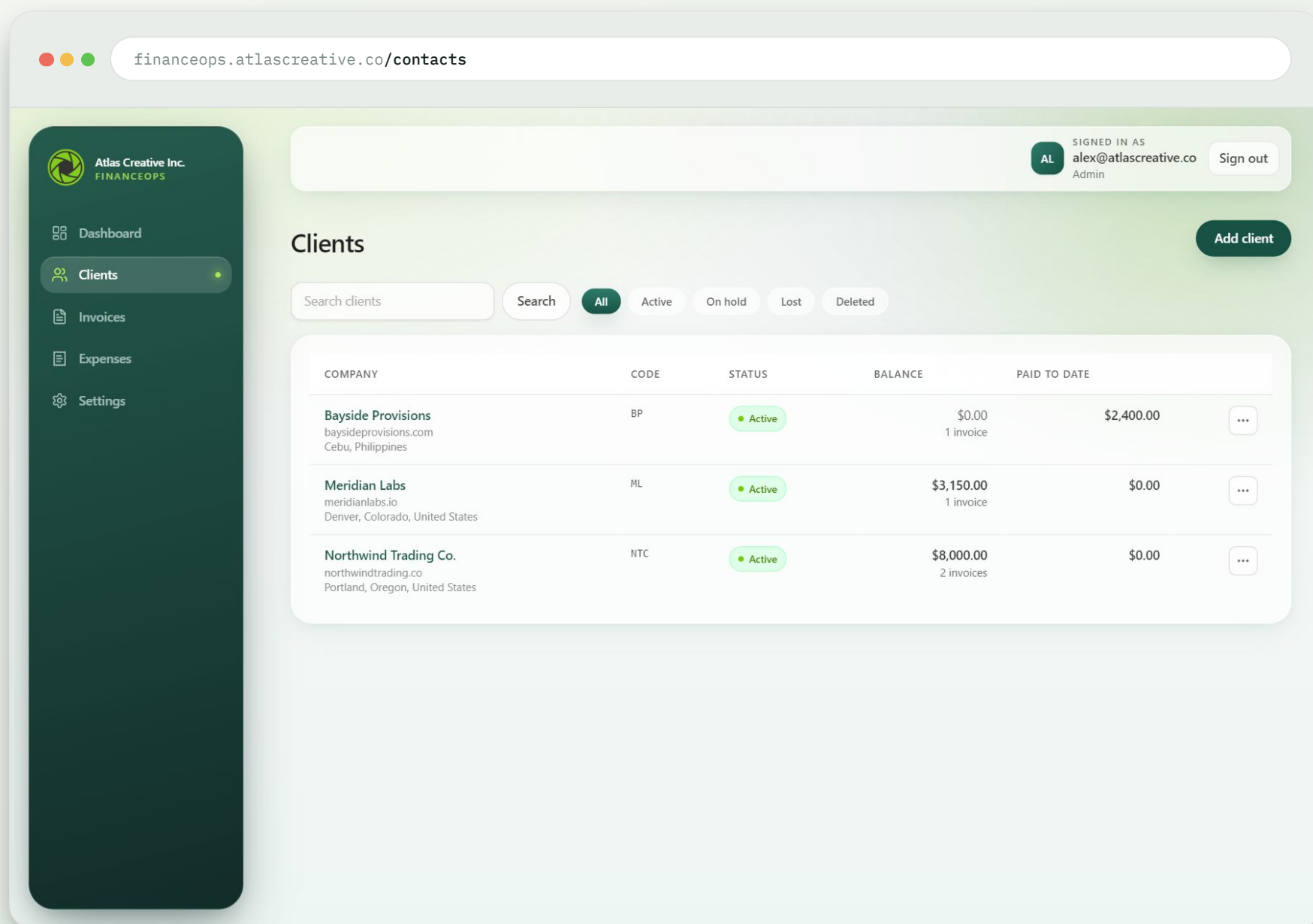


 FIND THEM FAST

Every client, **one list.**

3

Search by name or filter to Active, On hold, Lost — or the Deleted bin, where anything removed by mistake is waiting to be restored. Balance and paid-to-date on every row.

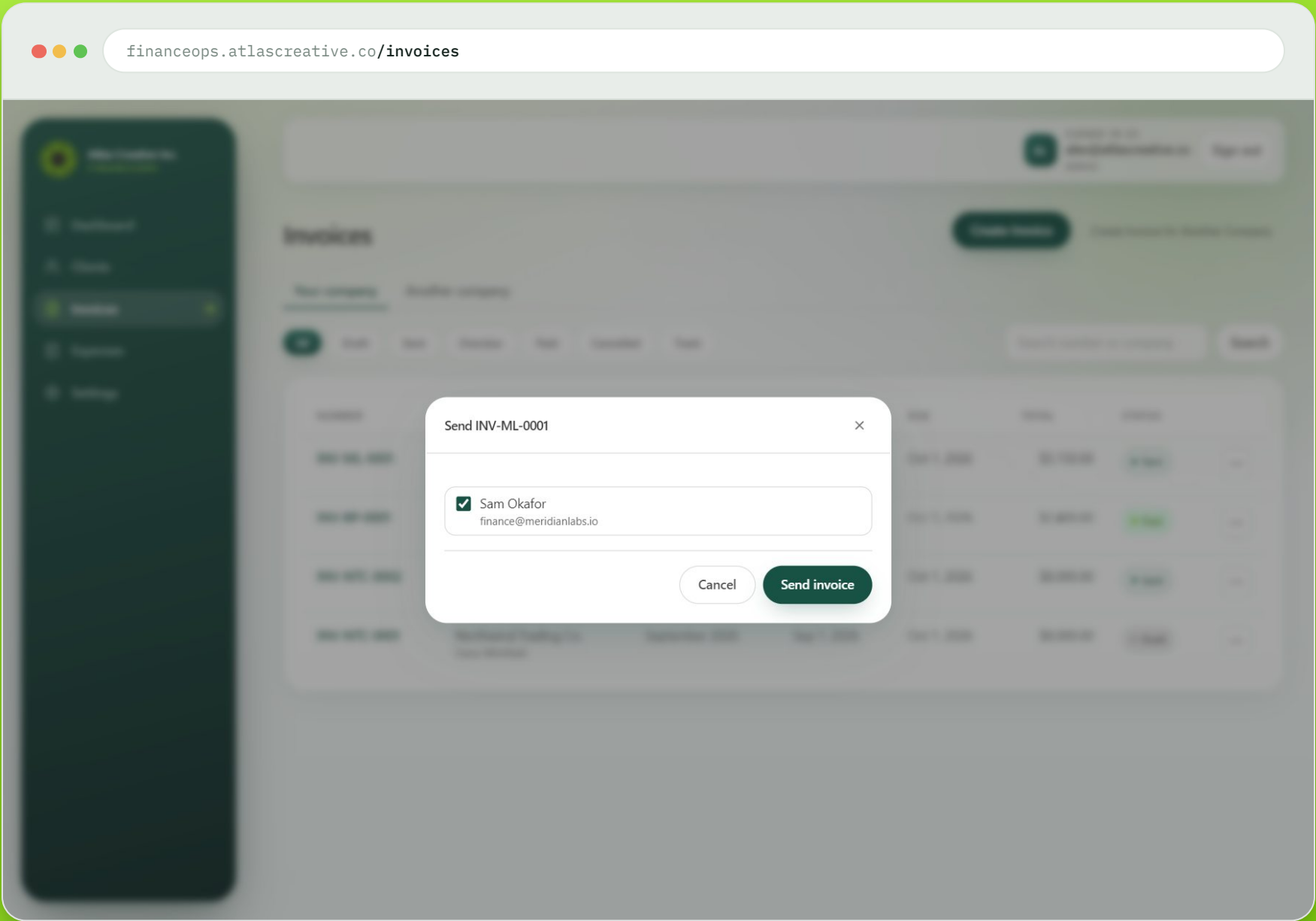


The screenshot displays the FinanceOps web application interface. The browser address bar shows the URL `financeops.atlascreative.co/contacts`. The left sidebar contains navigation links: Dashboard, Clients (selected), Invoices, Expenses, and Settings. The main content area is titled "Clients" and includes a search bar and filter buttons for All, Active, On hold, Lost, and Deleted. A table lists three clients with their details, including company name, code, status, balance, and paid-to-date amount.

COMPANY	CODE	STATUS	BALANCE	PAID TO DATE
Bayside Provisions baysideprovisions.com Cebu, Philippines	BP	Active	\$0.00 1 invoice	\$2,400.00
Meridian Labs meridianlabs.io Denver, Colorado, United States	ML	Active	\$3,150.00 1 invoice	\$0.00
Northwind Trading Co. northwindtrading.co Portland, Oregon, United States	NTC	Active	\$8,000.00 2 invoices	\$0.00

Tick the names. Send.

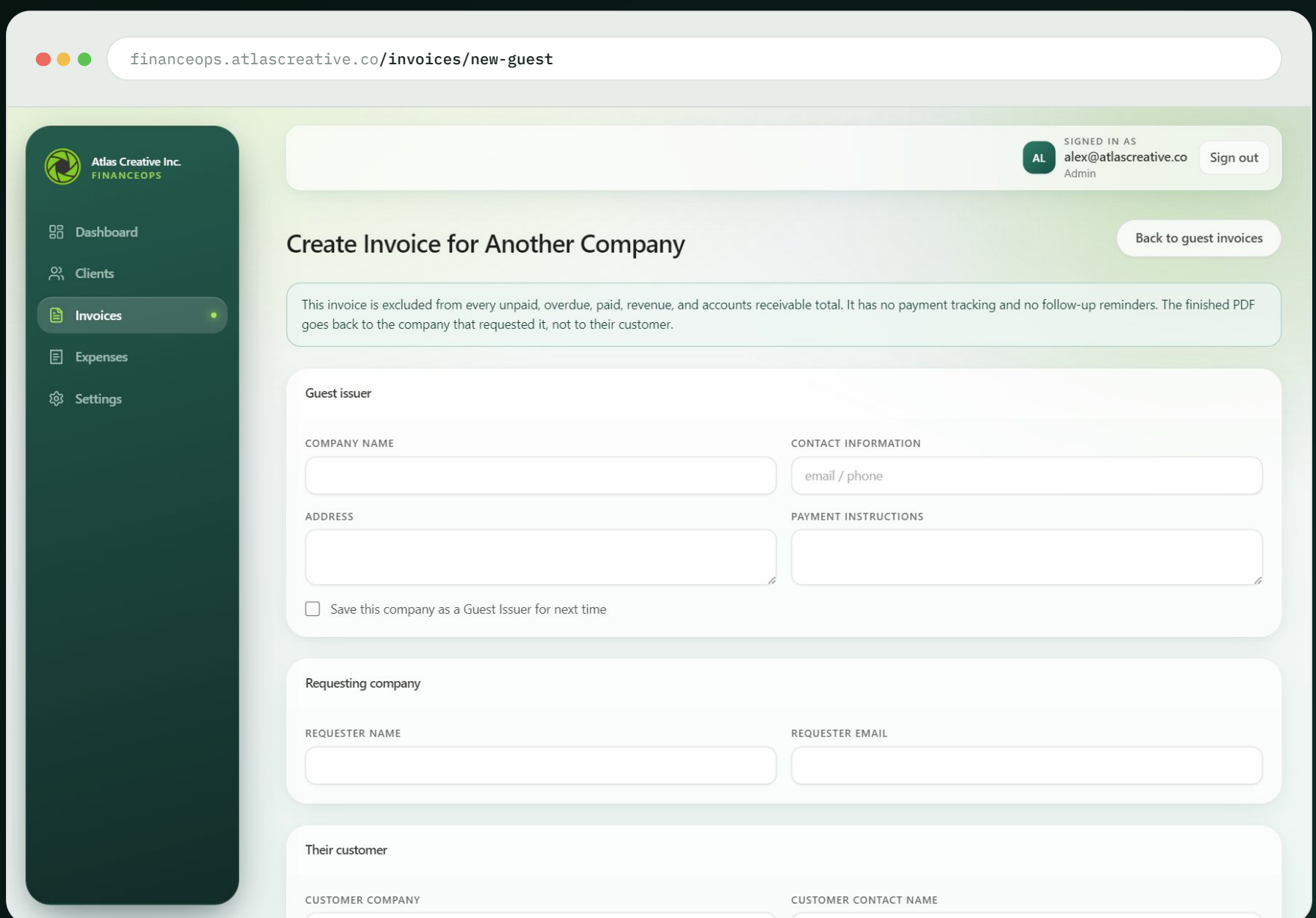
The PDF is attached, the wording comes from your saved template, and the Cc list is already filled in from the client. Nothing to compose.



 YOURS, OR THEIRS

Bill for yourself — or for someone else.

Raise an invoice under your own company, or prepare one on another company's letterhead and hand it back to them. Guest invoices never touch your receivables.



The screenshot shows a web browser window with the URL `financeops.atlascreative.co/invoices/new-guest`. The application interface includes a dark green sidebar on the left with the logo "Atlas Creative Inc. FINANCEOPS" and navigation links for Dashboard, Clients, Invoices (highlighted), Expenses, and Settings. The main content area is titled "Create Invoice for Another Company" and includes a "Back to guest invoices" button. A disclaimer states: "This invoice is excluded from every unpaid, overdue, paid, revenue, and accounts receivable total. It has no payment tracking and no follow-up reminders. The finished PDF goes back to the company that requested it, not to their customer." The form is divided into three sections: "Guest issuer" with fields for Company Name, Address, Contact Information (email/phone), and Payment Instructions; "Requesting company" with fields for Requester Name and Requester Email; and "Their customer" with fields for Customer Company and Customer Contact Name. A checkbox at the bottom of the Guest issuer section allows saving the company as a Guest Issuer for next time. The top right of the interface shows the user is signed in as "alex@atlascreative.co" (Admin) with a "Sign out" button.

financeops.atlascreative.co/invoices/new-guest

Atlas Creative Inc. FINANCEOPS

Dashboard

Clients

Invoices

Expenses

Settings

SIGNED IN AS alex@atlascreative.co Admin Sign out

Create Invoice for Another Company

Back to guest invoices

This invoice is excluded from every unpaid, overdue, paid, revenue, and accounts receivable total. It has no payment tracking and no follow-up reminders. The finished PDF goes back to the company that requested it, not to their customer.

Guest issuer

COMPANY NAME

CONTACT INFORMATION

email / phone

ADDRESS

PAYMENT INSTRUCTIONS

☐ Save this company as a Guest Issuer for next time

Requesting company

REQUESTER NAME

REQUESTER EMAIL

Their customer

CUSTOMER COMPANY

CUSTOMER CONTACT NAME

See the invoice as you write it.

The page builds beside you, line by line. No save-and-check loop — what you are looking at is the PDF the client receives.



Dashboard

Clients

Invoices

Expenses

Settings

Create Invoice

Create Invoice for Another Company

Back to invoices

Bill to

CLIENT COMPANY

Bayside Provisions

Dates and terms

COVERAGE PERIOD

ISSUE DATE

09/03/2026

DUE DATE

09/03/2026

Line items

LINE 1

\$0.00

TYPE

Retainer

ITEM

Preview

Maximise



Atlas Creative Inc.
100 Union Street
Portland, Oregon 97205
United States
billing@atlascreative.co

INVOICE

INVOICE # 200-07-0001
ISSUE DATE Sep 3, 2025
DUE DATE Sep 3, 2026

AMOUNT DUE

\$0.00

BILL TO

Bayside Provisions
600 Highland Street
Lehi, UT 84043
Providence
baysideprovisions.com

POINT OF CONTACT

Jordan Blake
jordan@baysideprovisions.com

ITEM	DESCRIPTION	AMOUNT
Line items appear here as you add them.		
Total		\$0.00

PAYMENT INSTRUCTIONS

Payment instructions have not been set yet. Add them in Settings > Fullscope Invoice

TERMS

Payment is due upon receipt of this invoice.

Notes

financeops.atlascreative.co/invoices/new

SIGNED IN AS alex@atlascreative.co Admin Sign out

 EVERYTHING ON ONE LINE

Tag the line.

Attach the proof.

Mark each line retainer or reimbursement and attach the receipt — it prints straight into the invoice the client receives. Payment instructions and notes arrive pre-filled from Settings.

Atlas Creative Inc.
FINANCEOPS

Dashboard

Clients

Invoices

Expenses

Settings

ISSUE DATE

DUE DATE

SIGNED IN AS

AL alex@atlascreative.co Admin

Sign out

Line items

LINE 1

\$0.00

TYPE

Retainer

ITEM

DESCRIPTION

QUANTITY

1

AMOUNT

0.00

+ Add line

+ Add reimbursement

Supporting documents

ATTACH RECEIPTS OR DOCUMENTS

Choose Files

No file chosen

Any number of files. PDFs and images print after the invoice, from page 2 onward; other formats are listed and sent as email attachments.

Preview

Maximise

Atlas Creative Inc.

18 Fisher Drive
Portland, Oregon 97205
United States
billing@atlascreative.co

INVOICE #

2023-09-0002

ISSUE DATE

Sep 5, 2023

DUE DATE

Sep 5, 2023

AMOUNT DUE

\$0.00

BILL TO

BySide Provisions

400 Harbor Street
Lark, 97036
Philippines
bysideprovisions.com

POINT OF CONTACT

Jordan Blake

wp@bysideprovisions.com

ITEM

DESCRIPTION

AMOUNT

Total

\$0.00

PAYMENT INSTRUCTIONS

Payment instructions have not been set yet. Add them in Settings > Fullpage Invoice.

TERMS

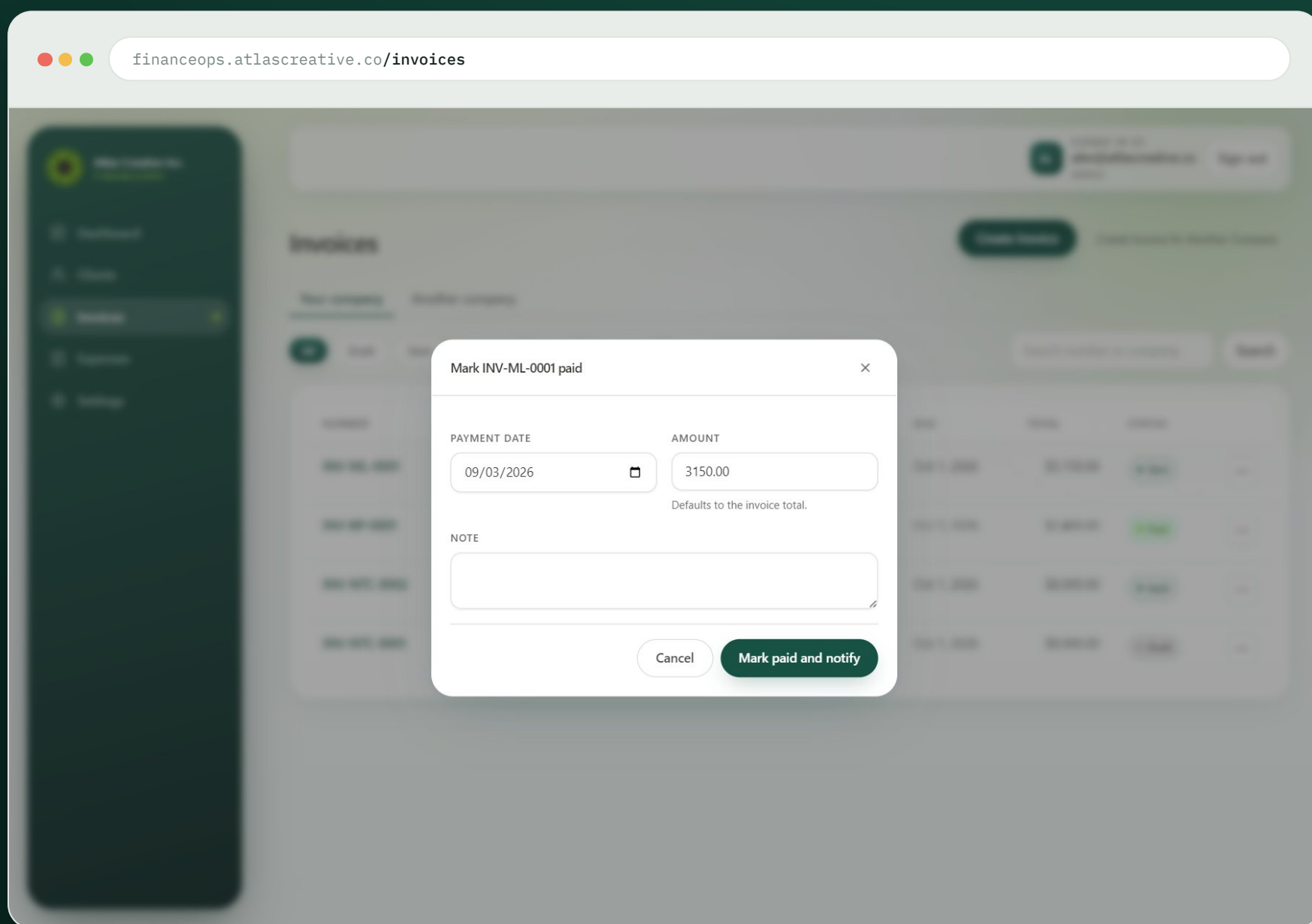
Payment is due upon receipt of this invoice.

Atlas Creative Inc. - Invoice 2023-09-0002 - Page 1 of 1

✓ MARKED PAID

Record it once. Everything else stops.

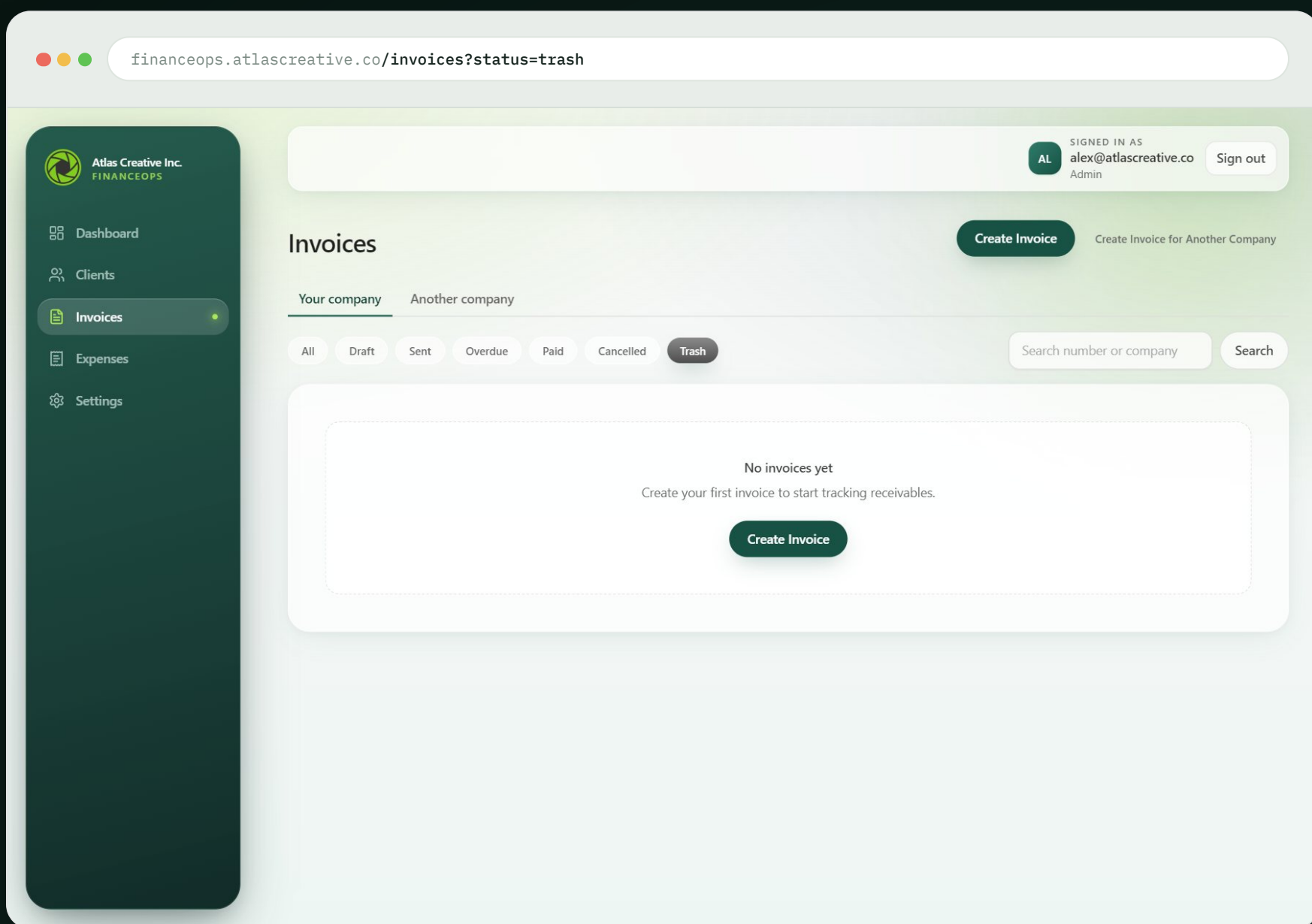
Follow-ups are scheduled the moment an invoice goes out — day 3, 5 and 7 — and each one waits for your nod. Log the payment and the client gets a confirmation while the whole queue clears itself.



🔄 TRASH, NOT GONE

Delete **without** **the held breath.**

Deleted invoices and clients go to a trash with their numbers, lines and history intact. Restore puts one back exactly as it was; only emptying the trash is final.



Drop the file. Fields fill in.

Merchant, date, total and category are read straight off the receipt and put into the form. You check them rather than type them.

financeops.atlascreative.co/expenses/reports/september-2026

New expense

MERCHANT

Cascade Inn

RECEIPT DATE

08/16/2026

CATEGORY

Transportation

TOTAL

189.00

CURRENCY

USD

NOTES

Save expense

Cancel

RECEIPT

Cascade Inn

Receipt

Order #4417-2208 — Thank you for staying with us

Date

Aug 16, 2026

Payment method

Visa ending 4417

Guest

Alex Rivera

Description

Amount

Room, one night — King

\$164.00

City occupancy tax

\$18.20

Parking

\$6.80

Total

\$189.00

Cascade Inn — 220 Harbor Street, Portland, Oregon 97205

Questions? stay@cascaidinn.example — issued electronically

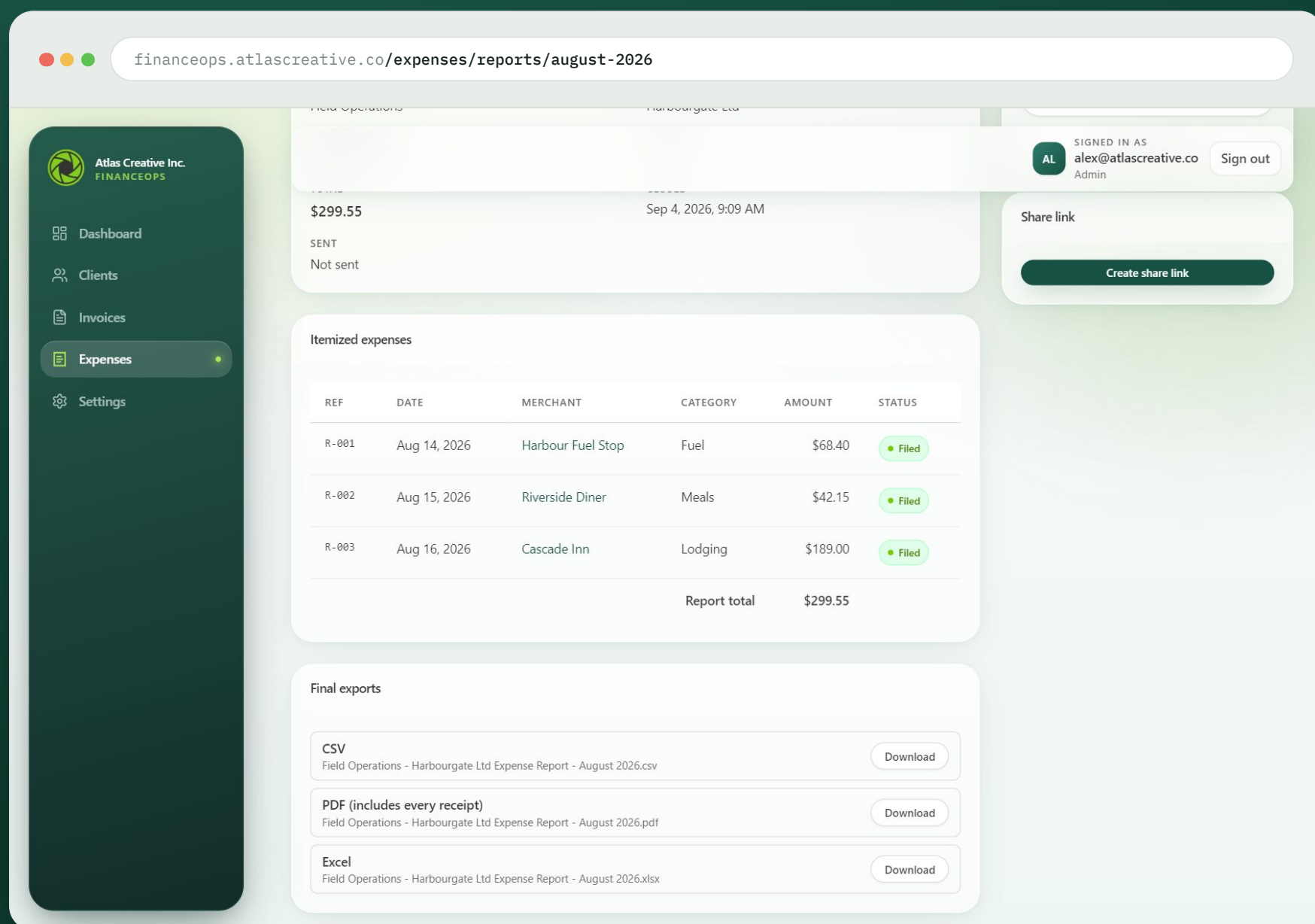
receipt-demo.pdf

Filled merchant, date, total, category from the receipt. Check before saving.

 CLOSE THE MONTH

One click, **three files.**

Closing a report writes a PDF with every receipt appended, plus Excel and CSV carrying the same lines — or share a link that opens the whole thing without an account.



financeops.atlascreative.co/expenses/reports/august-2026

Atlas Creative Inc. FINANCEOPS

- Dashboard
- Clients
- Invoices
- Expenses**
- Settings

\$299.55 Sep 4, 2026, 9:09 AM

SENT
Not sent

SIGNED IN AS **alex@atlascreative.co** Admin [Sign out](#)

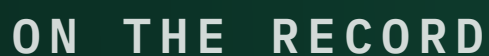
Share link
[Create share link](#)

Itemized expenses

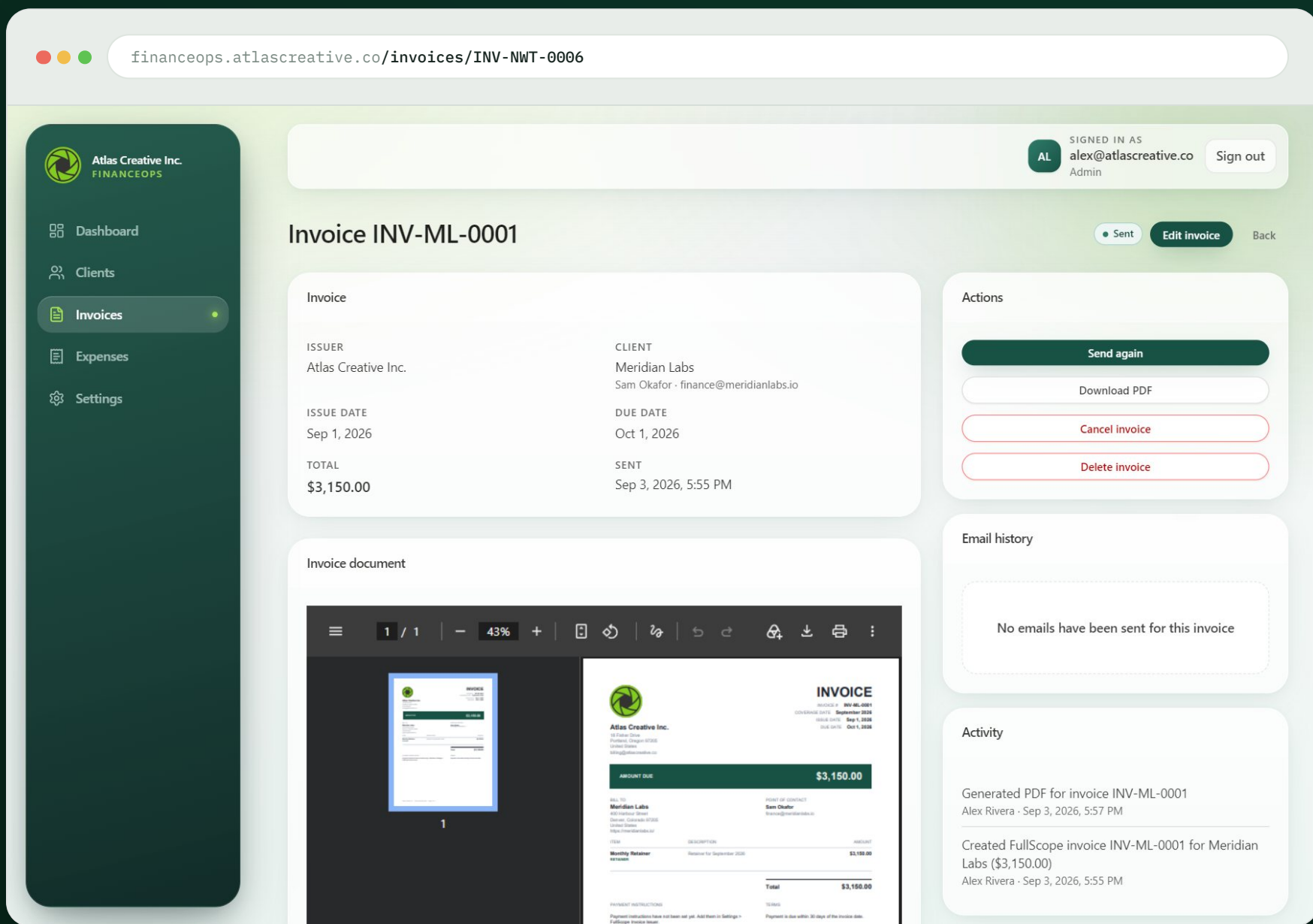
REF	DATE	MERCHANT	CATEGORY	AMOUNT	STATUS
R-001	Aug 14, 2026	Harbour Fuel Stop	Fuel	\$68.40	• Filed
R-002	Aug 15, 2026	Riverside Diner	Meals	\$42.15	• Filed
R-003	Aug 16, 2026	Cascade Inn	Lodging	\$189.00	• Filed
Report total				\$299.55	

Final exports

- CSV**
Field Operations - Harbourgate Ltd Expense Report - August 2026.csv [Download](#)
- PDF (includes every receipt)**
Field Operations - Harbourgate Ltd Expense Report - August 2026.pdf [Download](#)
- Excel**
Field Operations - Harbourgate Ltd Expense Report - August 2026.xlsx [Download](#)



Who it went to, when it was opened, what was paid and every action taken — all on the invoice itself, beside the document the client received.





SET IT, FORGET IT

14

Profiles, entities, categories — yours to shape.

Who the spending belongs to, which entity it is billed under, and how it is categorised are all lists you keep. Add, rename or remove one and every report after it follows.

financeops.atlascreative.co/settings?tab=categories

Atlas Creative Inc.
FINANCEOPS

Dashboard

Clients

Invoices

Expenses

Settings

SIGNED IN AS
alex@atlascreative.co
Admin

Sign out

Settings

Your CompanyOther CompaniesExpense ProfilesExpense EntitiesExpense CategoriesEmail TemplatesViewers

Add a category

CATEGORY NAME

Add category

Categories

NAME		STATUS	ORDER	ACTIONS
Meals	Rename	Active	↑ ↓	Retire Delete
Entertainment	Rename	Active	↑ ↓	Retire Delete
Transportation	Rename	Active	↑ ↓	Retire Delete
Travel	Rename	Active	↑ ↓	Retire Delete
Lodging	Rename	Active	↑ ↓	Retire Delete

✉ WRITE IT ONCE

Say it your way, every time.

Invoice, follow-up, payment confirmation, expense report — each has wording you set once. The number, the amount and the client's first name drop in on their own.

The screenshot shows a web browser window with the URL `financeops.atlascreative.co/settings?tab=templates`. The page is titled "Settings" and has a sidebar with navigation links: Dashboard, Clients, Invoices, Expenses, and Settings (which is highlighted). The main content area is for "Email Templates" and includes a "Save template" button. The "Invoice email" section shows placeholders for invoice details and a pre-filled subject and body. The "Guest invoice delivery email" section is partially visible at the bottom.

financeops.atlascreative.co/settings?tab=templates

SIGNED IN AS alex@atlascreative.co Admin Sign out

Settings

Your Company Other Companies Expense Profiles Expense Entities Expense Categories **Email Templates** Viewers

Templates only pre-fill the compose form. You still review and send every message by hand.

Invoice email

Placeholders: {{invoice_number}} {{client_name}} {{contact_name}} {{contact_full_name}} {{amount}} {{issue_date}} {{due_date}} {{issuer_name}} {{payment_instructions}} {{notes}}

SUBJECT

Invoice {{invoice_number}} from {{issuer_name}}

BODY

Hi {{contact_name}},

Please find attached invoice {{invoice_number}} for {{amount}}, issued {{issue_date}} and due {{due_date}}.

{{payment_instructions}}

Thank you,
{{issuer_name}}

Save template

Guest invoice delivery email

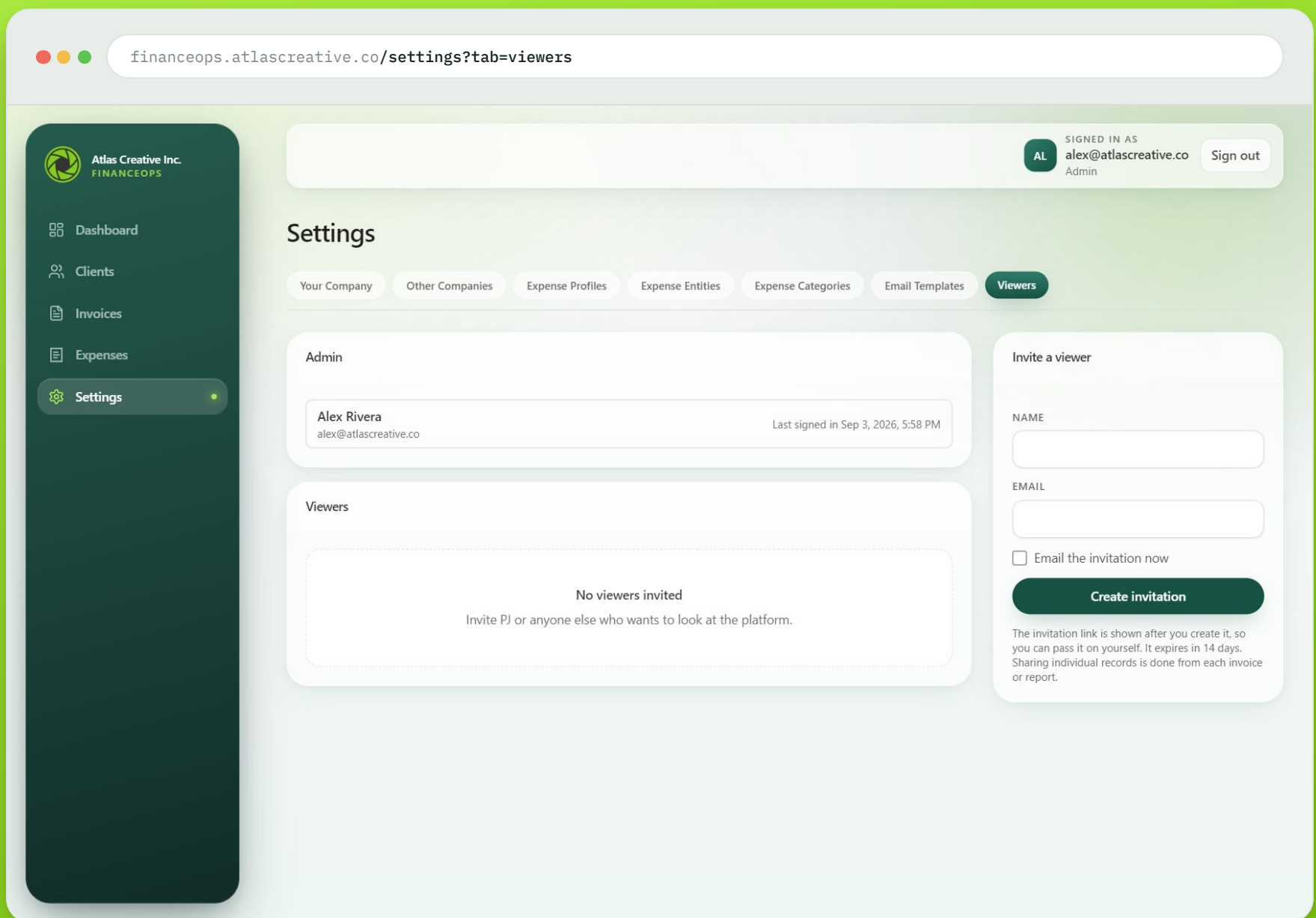
Placeholders: {{invoice_number}} {{customer_name}} {{requester_name}} {{requester_full_name}} {{amount}} {{due_date}} {{issuer_name}}

SUBJECT

Let someone look. Nothing more.

Invite a viewer by email and they see only what you have shared — no editing, no invoicing, no settings. Revoke the account and their way in closes with it.

16





YOURS TO KEEP

Your logo. Your address. Your invoices.

Everything on the invoice comes from Settings — the mark, the company details, the payment instructions. Change it there and every invoice after it follows.

Payment instructions

I. TO PAY BY ACH

Bank Name: your bank

Routing and account numbers

Terms

Payment is due upon receipt of this invoice.