Fube

GUIDE

How to automate your recurring invoices step by step



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Updated · 10 November 2026

> Some income repeats identically every period: a monthly fee, a rent, a maintenance contract, a retainer. Invoicing it isn't difficult, it's **tedious**: every month you have to copy the previous invoice, change the date and check that the number follows the correct series. Multiplied by all your recurring fees, that's half a morning and a source of slip-ups — the one you forget, the one that goes out with the wrong date, the one that breaks the numbering. This guide is for anyone who invoices the same thing periodically and wants to set it up **just once** so that each invoice prepares itself.

Before you start

Let's start with what nobody tells you until you go looking for it: **recurring invoices aren't included in the free plan**. They're a module available from the Pro plan upwards, with a quota of templates that increases with the plan. If you're on Starter, **Recurring** does appear in the menu — the option doesn't disappear — but what you find when you open it isn't the list of templates, it's the card offering to activate the module. In other words, the click doesn't give you an error or a strange blank page; it takes you to the subscription screen. You can compare them in plans and pricing, which come with a trial period.

Once the plan is sorted, the rest is having what you're going to invoice to hand:

- The **customer record** for the customer you're going to invoice, already created.
- The **items** (products or services) you'll include, with their tax type and, if you're a professional, their IRPF withholding.
- A decision on **how often** you invoice and in which **series**.
- **Verifactu activation completed.** You don't need it to *create* the template or for Fube to prepare the draft, but you do need it to **issue** it: without it, every month you'll find a draft you can't finalise, and a template that issues automatically won't generate anything and will alert you to the failure. It's a one-off step and it's covered in the guide on how to get started with Verifactu.

With that sorted, setting up the recurring invoice takes a couple of minutes.

Step 1 — Open recurring invoices

Go to **Sales › Invoices › Recurring**. That's where the templates live: each one is a ‘master’ invoice that Fube will use to generate the real invoices when their date comes round. If it's your first time, you'll find the list empty and the button to create the first one. You'll find the details of how this part works on the recurring invoices page.

Step 2 — Create the template

Set the **customer**, the **items** you're going to invoice (with their tax and their IRPF if you're a professional), the **payment methods** and the numbering **series**. It's the same information you'd enter on a normal invoice, but you save it as a template so it's reused every period instead of being redone each time.

There are two fields specific to the template that are worth not rushing through:

- **Name**, which is **required**. It doesn't appear on the invoice: it's what the template is called for you and, above all, **it's the text that appears in notifications** (‘The recurring invoice has been generated: X’). A ‘Recurring 1’ leaves you guessing once you have fifteen; ‘Monthly maintenance fee — Acme S.L.’ can be read at a glance.
- **Days until due date**, which defaults to 15. Each invoice generated will take that number of days from its transaction date to calculate the due date. If you get paid at 30 or 60 days, change it here once and stop correcting it every month.

The series you choose determines the numbering order. If you're not yet sure how to organise your series or why numbering must be consecutive, review how series and numbering work: Fube keeps them consecutive and gap-free for you.

The description fills itself in with the period date

This is the detail that turns a decent template into a good one. In the **Description or project** field you can insert variables that Fube replaces when generating each invoice:

`{mes_operacion}`, `{año_operacion}`, `{fecha_operacion}`, `{mes_vencimiento}`, `{año_vencimiento}` and `{fecha_vencimiento}`.

So `Mantenimiento web — {mes_operacion} {año_operacion}` comes out as 'Mantenimiento web — marzo 2027' in March and as 'Mantenimiento web — abril 2027' in April, without you touching anything. The form shows you a preview with the real dates of the next issue as you type.

Step 3 — Set the frequency and the interval

This is where you decide the pace. Recurrence is **frequency by interval**: you choose one of the four base frequencies — daily, weekly, monthly or yearly — and combine it with an interval to fine-tune it:

- **Quarterly**: monthly frequency, interval 3 (every 3 months).
- **Fortnightly**: weekly frequency, interval 2 (every two weeks).
- **Yearly**: for a licence or a service that renews once a year.

You set the **start date** — if you leave it empty, today's date is used, and if you set it in the future the first invoice is generated on that day — and, if you like, where it stops: the **total number of invoices to generate** (for example, twelve instalments and stop) or an **end date**, the last day on which it can generate one. If you don't limit it, the template will keep preparing invoices for as long as you keep it. When there is less than a month to go until its end date, the form and the list warn you, in case you want to extend it.

As you fill in these three fields, the form shows you below the **upcoming issue dates** that result from the combination. Check them before saving: it's the quickest way to catch a wrongly set interval, and it saves you finding out on the day an extra invoice turns up.

Step 4 — Review the draft Fube prepares

When the scheduled date arrives, Fube creates the invoice as a **draft** and notifies you within the app with a notification that carries the template's name. That draft is your checkpoint: between the calendar preparing the document and it going out with tax effect, you decide.

With one caveat: the draft is the **default** behaviour. The template has the **Issue automatically** switch and, if you turn it on, each invoice is issued on its due day, with its number from the series and its Verifactu record, without going through draft. If you leave it alone, your recurring invoices generate drafts for you to review and issue yourself.

The notification goes to team members who have permission to view recurring invoices, not to everyone.

Step 5 — Issue the invoice

Open the draft, check that everything is in order (amount, line items, dates) and **issue it**. You always confirm the issue yourself.

Once issued, the recurring invoice is treated like any other: Fube records it with its **chained hash** and its **QR code** and **sends it to the AEAT**, just as if you had created it by hand. The series and numbering come out in order.

Bear in mind: to issue, you need Verifactu enabled. It's the condition most worth checking in the first month, and what happens without it depends on the template:

- **If it generates drafts** (the default), the drafts arrive on time, but they can't be issued: when you try, you'll see 'The invoice cannot be issued because Verifactu is not active'. Complete the **Verifactu activation** and issue them afterwards: they're still there.
- **If it has 'Issue automatically'**, on the night it's due Fube tries to issue it, can't, and leaves nothing: neither invoice nor draft. You receive the notification 'The recurring invoice "X" could not be generated on its scheduled date'; that invoice isn't lost and Fube tries again every night, with its notice, until you enable Verifactu.

How to manage a recurring invoice already set up

Each template has a **status**, which you see in the list: **Active** (generates its invoices), **Paused**, **Finished** (it reached its end date or its total number of invoices; Fube sets it) or **Cancelled**. From each template's menu you have what you need day to day:

- **Edit recurrence rule**, to change amounts, frequency, repetitions or customer. The changes affect **future invoices**; those already generated are left untouched.
- **Duplicate recurrence rule**, which is what you'll use to set up a customer's second instalment without redoing it from scratch. The copy is created instantly and opens for you to adjust, with two deliberate changes: it **starts tomorrow** and **doesn't issue automatically**, even if the original did, so that what it generates are drafts while you review it. If you want it to issue automatically, turn on **Issue automatically** in the copy.

- **Pause** and **Resume**, to stop generating for a while — a customer who pauses the service in August — without losing the template. When resumed, it continues from its **next date**: it doesn't recover the invoices from while it was paused. A finished one can also be resumed, if you first extend its end date or its total number of invoices.
- **Cancel rule**, to stop it completely. A cancelled one can't be reactivated: if you need it again, duplicate it. The invoices it has already generated don't change.
- **Delete recurrence rule**, if you don't even want to see it in the list. Invoices already generated **are kept**: you delete the template, not the history.

And if what you want is for it to stop on its own, don't cancel it: set an **end date** or a **total number of invoices** and it will stop when it gets there.

Already have the invoice done? Don't write it out again as a template: in the invoice menu, **Convert to… › Make recurring** creates the rule with its customer, its line items and its texts — the invoice description becomes that of each invoice it generates —, starting tomorrow and without issuing automatically, so you can review it. The same works from a simplified invoice.

Edge cases and common errors

A few situations worth being clear about in advance:

- **You raise the price of a subscription fee**: edit the template and the new amount will apply to invoices generated **from that point onwards**; those already issued do not change. It does not update by itself, so it is a good idea to review your recurring invoices from time to time so that amounts and terms remain current.
- **You need to invoice a past period**: automatic generation only works **going forward**. For a previous month, create that invoice manually from the invoice list.
- **Several fees for the same customer**: you can have as many templates as your plan allows, and that means hundreds. It is common to have one per item — for example hosting, maintenance and support — each with its own frequency.
- **You collect payment by SEPA direct debit**: schedule generation a few days before the charge, so you have time to review and send each invoice along with its debit.

- **A generation fails** (a deleted customer, a series without a valid account or, if the template issues automatically, Verifactu not activated): Fube alerts you, but **the notification does not tell you why**. Its text is always the same: 'The recurring invoice "X" could not be generated on its scheduled date. Review it to fix the problem'. So you will need to open the template and check what is missing — usually it is the customer or the series. The good news is that the recurring invoice **remains active** and **does not use up that occurrence**: if you fix it, it tries again on the next run.

Frequently asked questions

Is the invoice issued automatically or do I review it first? By default, you review it: Fube prepares each invoice as a draft and alerts you. If you prefer it to go out automatically, the template has the **Issue automatically** switch: each invoice is issued on the day it is due, with its number from the series and its Verifactu record, without going through draft.

How often can I invoice? You combine frequency (daily, weekly, monthly or yearly) with an interval, so you cover everything from 'every day' to 'once a year', including quarterly or fortnightly.

Do recurring invoices comply with Verifactu? Yes. Once you issue the draft, the invoice is treated like any other: it is recorded with its hash and QR code and sent to the AEAT. However, **to be able to issue you must have activated Verifactu beforehand**: otherwise, the draft is still generated but cannot be finalised, and a template that issues automatically generates nothing and alerts you. Remember that using an invoicing system compliant with Verifactu is mandatory for companies from **1 January 2027** and for all other business owners, professionals and self-employed workers from **1 July 2027**. If you want a practical step-by-step guide, see **how to get started with Verifactu in Fube**.

Does the price update by itself if it changes? No. You edit the template and the new amount applies to future invoices; those already generated remain unchanged.

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