Fube

GUIDE

How to convert a lead into a customer in Fube



fube.es

Updated · 14 October 2026

How to convert a lead into a customer in Fube

> A **lead** is a sales contact: someone who is interested but whom you haven't invoiced yet. While you negotiate, that prospect lives in your CRM with their name, company, phone number and the status of the conversation. The key moment comes when they say yes: at that point they stop being an opportunity and become a **real customer**, with their own record and ready for you to issue invoices to. This guide takes you, step by step, through converting a lead into a customer in Fube, so you don't have to retype details you already had.

Before you start, one detail is worth being clear about: in Fube, leads are added **by hand**. The sources you can tag (web form, social media, referral, trade fair...) are exactly that, **source tags** that you choose when creating the lead so you know where it came from. There is no automatic capture from your website or social media: you or your sales team create the lead when the opportunity arises.

Prerequisites

To convert a lead you need:

- **The CRM module**, which is **not included in either the free plan or Pro**. Leads live in CRM and on those two plans that section doesn't take you to the list: it takes you to a screen that explains the module and offers you an upgrade. From **Business** upwards you get it in full; what each plan includes is on the pricing page.
- **A lead already created** in the CRM, with at least their first name and surname.
- The lead must be in a **convertible status**: qualified, proposal sent or in negotiation. A newly captured or not yet contacted lead can't be converted yet; nor can one marked as lost (we look at this in detail below).
- **Permission** to manage leads. Even if your plan includes the CRM, access is assigned by role: if your account has it and you still can't see the section, ask whoever administers the account. How access works is explained on the roles and permissions page.

You don't need the prospect's NIF or tax address to convert them: these are optional details that you can provide at the time or leave for later.

Step 1: open the lead you want to convert

Go to **CRM › Leads** and find the prospect in the list. You can search by name, company or email, or filter by status to see only those that are well advanced in the conversation. When you open their record, Fube shows their contact details, their current status and the activity logged.

Fube

START TODAY

Put this into practice with Fube

Create your free account and issue your first Verifactu-compliant invoice in minutes. No card, nothing to install.

fube.es

Invoicing and business management for freelancers and SMEs in Spain