Fube

GUIDE

How to convert a quote into an invoice in Fube (step by step)



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> The customer has said yes. You've got the quote put together — with its customer, its lines, its prices and its discounts — and the last thing you want is to retype the whole thing into an invoice. This guide explains, step by step, how to **convert a quote into an invoice** in Fube without losing a single line, and exactly what happens with the numbering and the tax side when you do it.

Before you start

Three things worth being clear about so you don't get any surprises:

- **The quote has no tax effect; the invoice does.** The quote is a commercial offer: you can edit it, resend it and negotiate it freely, and it doesn't count for the tax authorities. The invoice that comes from it, on the other hand, **is a tax document**: it carries its series number and enters the Verifactu-compliant flow as soon as you issue it.
- **Converting doesn't issue the invoice: it leaves a draft.** Converting instantly creates a **new draft invoice** with the quote's details and opens it for editing. You review it and issue it when everything is correct. Converting on its own doesn't send anything or reserve a final number.
- **Verifactu is needed to issue, not to convert.** If your account is subject to Verifactu and you haven't yet completed its setup, converting still creates the draft, and at the top you'll see the notice ‘You can prepare invoices, but not issue them yet’. The requirement comes up again, this time as a block, when you click **Issue**. The only thing that won't even let you convert is a plan that doesn't include the Verifactu module: in that case Fube doesn't create anything and shows you ‘Almost ready to invoice’. This is covered in the guide on **how to get started with Verifactu**.

If what interests you isn't the walkthrough of the screens but **what converting involves** — when IVA becomes chargeable, why the numbering isn't broken and where the delivery note fits in the chain — that is covered in the article **converting a quote into an invoice: from the customer's yes to payment**.

If you've never issued an invoice in Fube, before going any further you may find the guide on **creating and issuing your first invoice** useful, as it covers the invoice form from start to finish. And if you want the full picture of the **quotes** tool, that's where you'll find the details of how they are created, shared and tracked.

Step 1 — Open the quote you want to invoice

Find the quote in your list of quotes and open it. You can convert it whether you have it marked as **accepted** or it is still **pending**. The only exception is a **rejected** quote: it is locked and cannot be converted. If at the time you marked it as rejected and the customer has changed their mind, first set it back to **pending** or **accepted** (or duplicate it) and then you'll be able to convert it.

If your customer accepted it themselves, from their customer portal or from the public link you sent them, you'll have received a notification in the bell and by email, showing who accepted it, when and their note. You can also see it on the quote's page, in the **Acceptance** section of the sidebar, where **From** tells you which of the two it came through. Accepting it doesn't convert it into anything: this step is still yours. And if they rejected it, it is locked just as if you had marked it yourself.

If the quote has already expired, that's fine. When its validity date has passed, Fube still creates the invoice and warns you in the same draft notice — 'This quote expired on …: check that the prices and terms still stand' — but **it doesn't stop you**: a customer who accepts late is a normal case and invoicing them is legitimate. The warning is there so that you don't convert a two-year-old quote without realising; check that the prices and terms still stand before issuing.

Step 2 — Click 'Convert into invoice'

On the quote's page you'll find the **Convert into invoice** button. It's the same as the **Convert to…** option in the actions menu — the one on its row in the list, or **More** on the quote's page — which lists the document types you can turn it into:

- **Convert to invoice** — the case covered in this guide.
- **Convert to pro forma invoice** — if it isn't a closed sale yet and you want to send an interim pro forma invoice.
- **Convert to delivery note** — if what you need is to prove a delivery before invoicing.

Click **Convert into invoice** (or **Convert to invoice** in the menu). The pro forma invoice and the delivery note are also created instantly, with their number — those documents don't have a draft — and they open so you can review them.

The options you see depend on your permissions: each destination (invoice, pro forma invoice, delivery note) requires permission to create that type of document. If one doesn't appear, it's a matter of permissions, not that the quote can't be converted. And if the **Convert to…** submenu doesn't appear at all, check the status: a rejected quote doesn't offer any destination.

Step 3 — Review the draft Fube has just created

When you click, Fube creates the invoice **as a draft** right then and opens it for editing, with the notice ‘Draft created: review it and issue it’. There's no intermediate form to save: the draft already exists, and if you leave without touching anything, it will be waiting for you in your draft invoices. It carries over what was in the quote: **the customer and all the detail lines** (items, quantities, prices and discounts) and their texts. In addition, the invoice is **linked to its source quote**, so that the traceability between the offer and the sale isn't lost.

When a form does open first. If the draft is missing some information that Fube can't fill in on its own, nothing is created: the conversion screen opens with everything filled in and a notice asking you to complete it and save it. You fill in whatever is missing, save, and then the draft is created.

What is **not** carried over is what belongs to the quote and not to the invoice: its number, its status and its quote series don't pass to the invoice. The invoice will take its **number from your invoice series** and its date when you issue it, not before.

The customer's tax details come from the quote. When creating the draft, Fube fills in the customer's details exactly as the quote captured them: if the customer changed their address or company name after you sent them the offer, the invoice is created with the details the quote captured at the time, which is what is correct for tax purposes.

If you **change the customer** in the draft, when you save it the invoice takes the tax details of the new customer — name, NIF and address, as they appear on their record — and drops those from the quote. As long as the customer stays the same, the details captured by the quote remain, however many times you save the draft.

There is no partial invoicing. The conversion carries over **all** the lines of the quote. If you only want to invoice part of it, convert anyway and **delete from the draft** the items you aren't going to charge for before issuing: whatever you remove doesn't remain 'pending' on the original quote or generate a second invoice.

Review the draft carefully. You can adjust any line, add or remove items, change the customer or edit the taxes before continuing. It's an editable invoice, not yet issued.

Step 4 — Issue the invoice when it's correct

When the draft reflects what you're going to charge, **issue it** like any other Fube invoice. At that moment — and only at that moment — the invoice takes its series number and its date, and is recorded with a QR code and a chained hash, and is sent to the AEAT within the Verifactu-compliant flow. If the Verifactu setup is still pending, when you click **Issue** Fube tells you — 'You need Verifactu to issue' — and lets you set it up right there; the draft is kept. You'll find the details of that submission on the page about **submission to the AEAT with Verifactu**.

Bear in mind the Verifactu compliance deadlines, always both of them: **1 January 2027** for companies (subject to Corporation Tax) and **1 July 2027** for all other businesses, professionals and self-employed people. If you want to prepare in good time, the guide on **how to get started with Verifactu** explains how to get everything ready.

Edge cases and common errors

- **You think converting already issues the invoice.** It doesn't. Converting leaves an **editable draft**; the invoice isn't a tax document until you issue it. Until then you can correct whatever you like.
- **A quote is converted into an invoice only once.** If you try again on one that already has its invoice, Fube rejects it: 'This document has already been converted into an invoice. It cannot be converted again'. This is deliberate: converting twice would invoice the same transaction twice. If you need another invoice for that customer, duplicate the quote and convert the copy.

- **The quote was rejected.** A rejected quote can't be invoiced: neither the button nor the conversion submenu appears, and if you do manage to request it, Fube creates nothing and warns you: 'This quote is rejected and cannot be invoiced'. To invoice it, first set it back to **pending** or **accepted** (or duplicate it).
- **You get 'Almost ready to invoice' and nothing is created.** It isn't a problem with the quote: your plan doesn't include the Verifactu module. If all that's missing is its configuration, you won't see this screen: the draft is created with the notice 'You can prepare invoices, but not issue them yet'.
- **The source quote doesn't change.** Converting neither modifies nor deletes the quote: it stays there, with its number and its status. A new invoice linked to it is simply created.
- **You want an intermediate step.** If the sale isn't fully closed yet, convert it first to a **pro forma invoice** (or to a **delivery note** if you're going to deliver before getting paid) and leave the invoice for when the time comes. The pro forma invoice can also be converted into an invoice later.
- **The same applies to pro forma invoices and delivery notes.** If you work with pro forma invoices, their **Convert to...** menu lets you turn them into an invoice, a delivery note or back into a quote. The delivery note, for its part, converts into a quote, a pro forma invoice or an invoice. The only difference: if the delivery note already has an invoice, Fube doesn't create anything yet and opens its conversion screen with the notice that it has already been invoiced, so you can decide whether to invoice it again.

Frequently asked questions

Does converting a quote issue the invoice automatically? No. The conversion creates a **draft** invoice with the quote's details. You review it and issue it yourself; until that step, no final number is reserved and nothing is sent.

What is copied from the quote to the invoice? The customer and all the detail lines (descriptions, quantities, prices and discounts), together with the customer's tax details as recorded on the quote. The invoice is also linked to the source quote. The quote's number, status and series are not carried over: the invoice uses your invoice series and takes its date when it is issued.

Can I invoice a quote that I marked as rejected? Not while it remains rejected: a rejected quote is blocked from conversion. If the customer changes their mind, first set it back to **pending** or **accepted** (or duplicate it) and you'll then be able to convert it into an invoice like any other.

Can I combine several quotes into a single invoice? Not directly: quotes are converted one at a time. If you need to group them, the way to do it is to convert them into **delivery notes** first and then group those delivery notes into a single invoice, as explained in the guide **from sales order and delivery note to invoice**.

Can I convert it into something other than an invoice? Yes. From the quote's **Convert to…** menu you can also create a **pro forma invoice** or a **delivery note**. You choose the destination depending on what stage the sale is at.

Invoice your quotes without rewriting anything

Having the quote accepted and turning it into an invoice without rebuilding the document is one of the biggest time-savers when you sell often. In Fube you do it from the quote itself, review the draft and issue it when it's ready, with the source always linked. If you're not using it yet, **create your free account** and put together your first quote to see it from start to finish.

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START TODAY

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