Fube

GUIDE

How to create and send a quote in Fube



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Updated · 16 November 2026

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> Before you invoice, there's almost always a conversation about price: the customer asks for an offer, you prepare it, send it and wait for the ‘yes, go ahead’. That offer is the **quote**, and the usual problem isn't creating it but losing it in your inbox: you can't remember which version you sent, which ones are still open or which ones have been closed.



This guide is for anyone who sells services or products and wants to keep that pipeline in order: you'll learn how to create a quote, send it to the customer and record their response so that you always know what's on the table.

Before you start, it's worth being clear about two things. First: a quote **is not a tax document**. It doesn't generate an accounting entry, it doesn't carry tax numbering and it isn't sent to the AEAT; that only happens when you issue the invoice. That's why you can edit it, resend it and negotiate with complete freedom. Second: you need a **quote series** set up (Fube creates one by default the first time, with the prefix PR and the year in front of the number, along the lines of `PR260001`) and, if you're going to send it by email, the customer's email address must be correct on their record. If you haven't yet added the person the offer is addressed to, you can **create the customer record** on the fly from the form itself.

Step 1. Create the quote

From the side menu, Fube's **quotes** panel brings together all your offers with their status, with tabs to view them by response: All, Accepted, Pending and Rejected. Click **Create quote** (or press the `N` key, which does the same) and fill in the form.

Five things are mandatory, and it's worth knowing them before you sit down to put it together:

Field	Why it will ask you for it
Series	Determines the numbering. While you're editing, Fube shows you the number it will get as provisional; it doesn't reserve it: it's assigned when you save, and if another quote in the same series is saved first, you get the next one
Quote date	The date of the offer. It can be today or earlier, never later, just like an invoice. The year in the number comes from it: a quote dated last year carries last year's numbering
Due date	How long it's valid for. **It isn't optional**: Fube won't let you save without it
Description	The main concept of the document, the one you'll see in the lists
At least one line	A quote with no items can't be saved

The rest is up to you. The **customer is optional** when you create the document (you can put the offer together and assign them later), although it's a good idea to include them because their details are copied into the quote. You add the **detail lines** from the catalogue or by hand, with quantity, price, discounts and the applicable tax rate (IVA, IGIC in the Canary Islands or IPSI in Ceuta and Melilla); the panel calculates the tax base, the taxes and the total. And the **payment methods, notes and footer** are commercial texts that appear on the document and that you can preconfigure as a template.

Making the due date mandatory is a deliberate decision: an offer with no expiry date stays open forever and there's no way to follow it up.

When you've finished, save. The quote is left with the status **Pending** while it awaits the customer's response.

> **Where all this is set up.** The series and the module preferences (default texts, taxes, template) sit within the **quotes module itself**, in **Sales > Quotes > Series** and **Sales > Quotes > Preferences**. There's no global 'Series and numbering' section in Settings: each document type has its own. If you run several lines of business and want separate numbering for each one, that's where you create independent series.

Step 2. Review and download the PDF (optional)

Before sending it, it's worth checking how it will look. From each quote's menu, **Download quote (PDF)** generates the document exactly as the customer will receive it, with your logo and your terms. It's the way to check the format or to attach it yourself to an email you've written by hand.

Step 3. Send it to the customer

Fube offers two ways of sending it, and you can use whichever you prefer depending on the situation.

Send by email

In the quote's menu, **Send quote** opens a panel with the recipient (it takes the email address from the customer record), a subject and a message, both already written with the quote number. Review the text, adjust it if you like and confirm. Fube sends the email with the quote attached.

Share a public link

The **Generate link** option creates a public URL and copies it to the clipboard. The customer opens it **without signing up to Fube** and sees the quote, which they can download as a PDF and, while it's awaiting a response, accept or reject from there (we cover this in step 4). It's handy for sharing via WhatsApp, Telegram or any channel you use.

The link expires, and it comes with a date already set. Fube suggests **90 days** (about three months) from the day you generate it; you can change that date before creating it, but if you don't touch anything, that's the period. When the day comes, the link genuinely stops working: Fube marks expired links every night and the customer can no longer see the document. If they ask you for it again, generate a new one.

Step 4. Record the customer's response

When the customer confirms (through whatever channel), open the quote and change its **acceptance status** to **Accepted** or **Rejected**. That status is visible in the list and feeds your conversion rate, so you can see at a glance how many offers you have on the table and how many have been closed.

Or let them respond themselves, from the link

If you sent them the public link, they don't need to tell you. While the quote is awaiting a response, above the document your customer sees **Does this quote work for you?**, the date by which they can respond if the quote has a validity date, and two buttons: **Accept quote** and **Reject**. Clicking either one opens a confirmation with **their name** and **a note**, both optional, and a line telling them what gets recorded: the date and time, the address they're responding from and whatever they write. When they confirm:

- **The quote's status changes automatically**, to Accepted or Rejected.

- **You get a notification** in the bell and by email (you and anyone on your team who can see quotes), saying that they responded 'from the link you sent them', with the amount and their note.
- **You can see it on the quote record**, in the **Acceptance** section of the sidebar: when they responded, **From**: 'The link you sent them' with the IP, their name if they left it, and their note.

They don't need an account or a portal. **They can only respond once**: if they open the link again, they see whether they accepted or rejected it, when, and their note, and if they change their mind they write to you. **An expired quote can no longer be accepted**: the link tells them it has expired and to ask you for a new one. And **if you've already converted it**, the buttons don't appear: they see the document and nothing else.

Or let them respond themselves, from their portal

If your plan includes the customer portal and that customer has access, they don't need to tell you: the quote appears in their portal, under **Documents** and on their Home page as **Quote awaiting response**, and when they open it they have **Accept quote** and **Reject**, with an optional note for you. For it to appear, the quote must have them as the customer.

When they respond:

- **The quote's status changes automatically**, to Accepted or Rejected.
- **The proof is kept**: who responded, with which email address, when, from which IP and their note. You can see it on the quote record, in the **Acceptance** section of the sidebar.
- **You get a notification** in the bell and by email (you and anyone on your team who can see quotes), with the amount, who it was and their note.

Three things worth knowing: **the customer responds once**—if they change their mind, they write to you and you change the status yourself—; **an expired quote can no longer be accepted**, either from the portal or from the link; and **accepting it does not create the invoice**, which you convert yourself in the next step. There is only one response, whichever way it arrives. While the customer has not responded, the **Acceptance** section tells you how long they have to do so and who at that customer has access; if nobody does, it offers you **Give access**. How the portal is set up is explained in the guide to activating the customer portal.

Neither the link nor the portal provides a binding electronic signature: the quote is a commercial offer, not a contract.

Be careful about marking a quote as Rejected lightly. It is not an informational label: a rejected quote is **blocked from conversion**, and the **Convert to…** submenu disappears from its menu. If you are not sure the offer is dead, leave it as Pending.

Step 5. When there is a sale, convert it into an invoice

With the quote accepted (or simply pending), click **Convert to invoice** on its record—or **Convert to…** in its actions menu—: Fube instantly creates a **new draft invoice** with the customer and lines from the quote, links it to the source document and opens it for editing so you can review it and issue it. You can also convert it into a pro forma invoice or a delivery note.

The full process—what is copied and what is not, what happens with numbering, what you need to have configured and why a quote can only be converted once—is in the guide to converting a quote into an invoice.

Edge cases and variants

- **Similar offers for several customers.** Use **Duplicate quote**: Fube creates the copy instantly—already numbered, because quotes have no draft stage—and opens it for editing, where you only change the customer and the quantities. It saves you building the document from scratch every time.
- **The customer asks for changes.** Edit the quote and send it again or share the link again. If you want to keep a record of each version, it is better to duplicate the original and send a new one.
- **Discarding an offer.** If a proposal no longer applies, you can delete it from its menu with **Delete quote**. As it is not an accounting document, deleting it has no tax effect whatsoever.
- **You marked it as Rejected and the customer has changed their mind.** A rejected quote cannot be converted into anything: first return it to **Pending** or **Accepted** (or duplicate it) and then convert it.

- **The validity date has passed.** Nothing happens automatically: the quote does not change status and is not locked. When you go to convert it, Fube warns you that it has expired and how many days ago, but still lets you invoice it—a customer accepting late is normal. Check first that the prices still stand. What does change is what your customer sees: after that date they can no longer accept it from their portal or from the link, and both tell them to ask you for a new one.
- **Your customer accepted it by mistake**, from the portal or from the link. It cannot be undone from there: change the status yourself in Fube. If you return it to **Pending**, they can respond again.

Frequently asked questions

Does a quote have any tax effect?

No. It is a commercial offer with no accounting impact: it does not generate a journal entry, has no tax numbering and is not sent to the AEAT. Only the invoice you generate from it counts for tax purposes.

Does the customer accept the quote from the link?

Yes. While a response is pending, the public link shows them **Accept quote** and **Reject**, without signing up and without access to your portal: the status changes automatically and you receive a notification. They respond once, and an expired or already converted quote cannot be responded to from there. If they confirm through another channel, you change the status yourself in Fube.

What happens when a quote's validity date expires?

Nothing automatic: the status does not change by itself. If the offer is no longer valid, duplicate the quote and send a new one with updated prices and terms.

Do not confuse this with the expiry of the **public link**, which is a separate matter and works independently: Fube sets it to 90 days by default and, after that date, the link stops opening the document even if the quote is still perfectly live.

What if the customer cannot open the link?

Check what the screen tells them. ‘Too many requests from your connection’ is a temporary limit—it happens in offices that share a connection—: they just need to wait a minute and click **Try again**. ‘The document could not be opened’ is an error generating the PDF, also temporary. In both cases, the link is still valid. Only with ‘Page not found’ has it expired or been deactivated, and you need to generate another one. It is the same for all documents you share by link; all three cases are covered in more detail in the frequently asked questions of **creating your first invoice**.

Can I convert a quote I marked as rejected?

Not while it remains rejected. The **Convert to…** submenu disappears from its menu, and if you go in via the conversion URL you will see the warning ‘This quote has been rejected and cannot be converted into an invoice’. Return it to **Pending** or **Accepted** first, or duplicate it.

Does the invoice generated from the quote comply with Verifactu?

Yes: it is an ordinary Fube invoice and follows the same flow as the rest of your invoicing. However, Verifactu **is not enabled by default**: if your account is already subject to it and you have not completed its configuration, you will be able to prepare the draft but not issue it—when you click **Issue**, Fube tells you ‘You need Verifactu to issue’ and lets you configure it right there. Bear in mind the compliance deadlines: **1 January 2027** for companies and **1 July 2027** for all other businesses, professionals and self-employed workers. The guide on **how to get started with Verifactu** walks you through activation.

That covers the journey of an offer: putting it together with the dates set, sending it through whichever channel you use and recording the ‘yes’ or ‘no’ so you do not lose track. You can **start using Fube for free** and send your first quote in minutes; the free plan is available forever.

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.

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