Fube

GUIDE

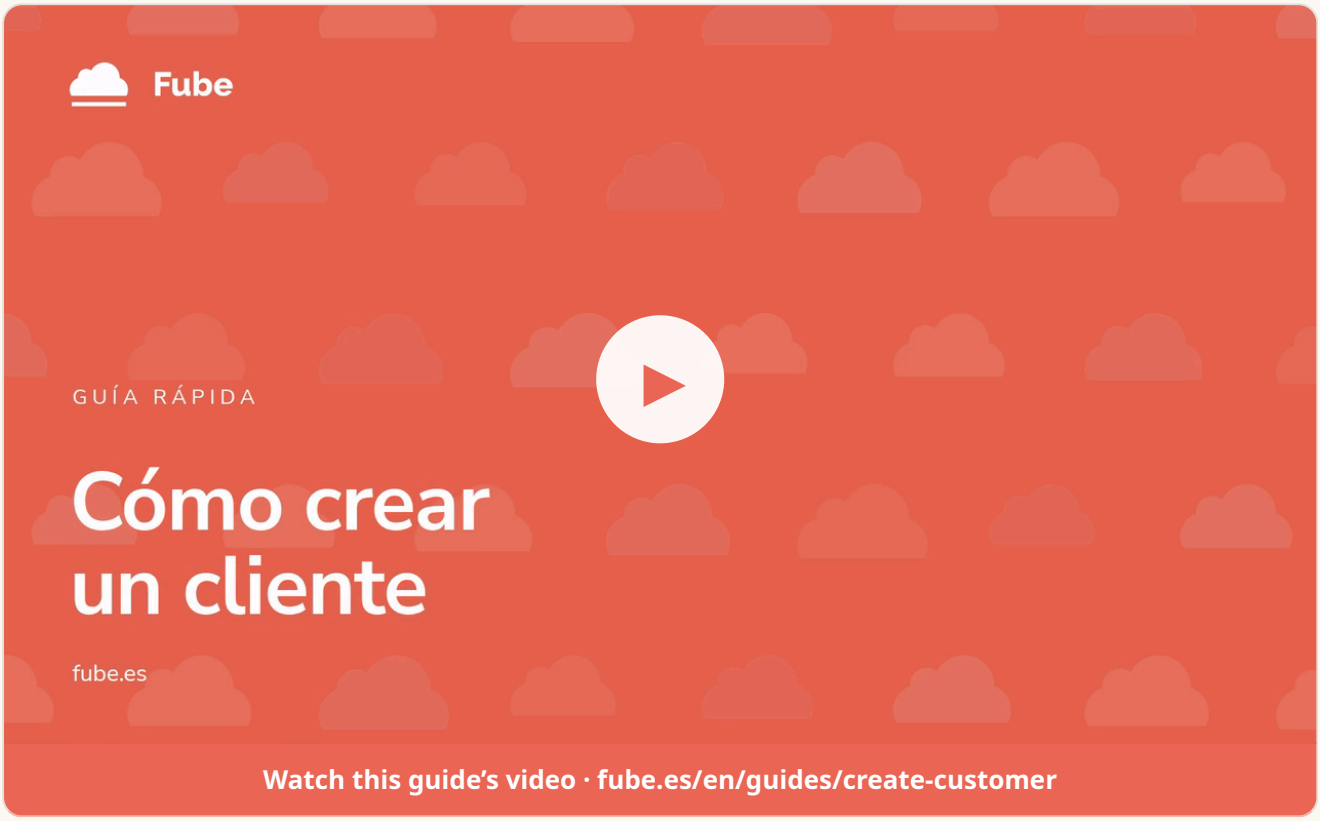
How to create a customer in Fube



fube.es

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> A customer who has been set up properly is half an invoice already done. Their details — the tax identifier, the name, the address — are what will be printed on **every invoice** you issue to them, so whatever you fill in here once, Fube reuses every time you invoice them.



And there is a decision made in the very first field that determines everything else: **the entity type**. It decides whether Fube lets you save with just a couple of details or demands the full tax record. This guide goes through it, and along the way saves you typing half the record if your customer has a CIF.

Where customers are created

Go to **Sales › Customers** and click **Create customer** — or press the `N` key, which does the same. A form opens with the details grouped into sections.

You can also create one **without leaving an invoice**: in the Customer field, type the name; if it doesn't exist, Fube offers to create it right there, carries the name you typed over to the form and, when you save, **leaves it selected on the invoice**. This is the natural route when the new customer turns up with the invoice already started. You can manage your full customer list in the customers section.

Step 1 — The entity type, which decides what you will be asked for

It is the first field and there are three options:

Type	What it is	What Fube requires
Individual	A private individual, someone who does not invoice for a business activity	Only the billing name
Self-employed	Someone who works for themselves: professionals, freelancers	Full tax record
Company	An entity with legal personality: S.L., S.A., cooperative…	Full tax record

'Full tax record' is meant literally, and it is worth knowing this before you start typing. If you choose Company or Self-employed, Fube **will not let you save** without the tax identifier type, the identifier, and the complete address: street, number, postcode, city, province and country. It is not a friendly warning you can put off: the form simply stops.

With **Individual** the opposite happens: all of that becomes optional and you can save the record with the name and little else, completing it once you have their details.

What if you invoice a public body? There is no 'Public administration' type. Choose **Company**, and a section then appears for the **administrative centres** — the DIR3 codes for the accounting office, managing body and processing unit — that the body has given you, and without which the e-invoice never reaches whoever has to pay it. That route is covered in full in the **B2B e-invoicing** guide.

Step 2 — The tax identifier is two fields, not one

This is where a lot of people get stuck, because it looks as though you have to choose 'CIF' or 'NIE' from a drop-down, and that is not the case.

- **Tax ID type**: this is the drop-down, and it contains **NIF-IVA**, **Passport**, **Official document**, **Certificate of residence** and **Other**. For the vast majority of Spanish and European customers, the answer is **NIF-IVA**. The other options are for foreign customers without a NIF-IVA, who identify themselves with whatever they have.

- **Tax ID**: this is the text field where you enter **the number**: the NIF, the CIF, the NIE or whichever VAT number it is. With the **NIF-IVA** type, Fube **checks the check digit**: if you drop a digit from a Spanish CIF, it warns you before saving with 'The NIF/CIF/NIE/DNI/VAT is not valid'. With the other types there is nothing to check, so there it is up to you to make sure the data is correct.

If the customer is from another European Union country and operates as a business, also switch on **'Registered in the ROI?'** and enter their **Intra-EU VAT number**. With that, an intra-community transaction between businesses with a valid VAT number normally goes **without Spanish IVA**, under the reverse charge mechanism. Once the customer is saved, you can **validate that VAT number against the European register** from their own record, without leaving Fube, and it is best to do so before the first invoice, not when you prepare the modelo 349.

Step 3: If they have a CIF, let Fube fill in the record

This step saves you half the form and hardly anyone knows about it.

Enter the company's **CIF** in **Tax ID**. Half a second after you stop typing, a panel appears below with what Fube has found in the register: name, address, town or city, postcode, province and country. Check that it is the right company and click **Use this data**.

Seven fields are filled in at once: **billing name**, **street**, **number**, **post code**, **town/city**, **province** and **country**. The rest (entity type, email, phone, ROI, reminders) you still enter yourself.

Three things worth knowing:

- **Nothing is written until you click the button.** If the data does not match, close the panel and carry on by hand.
- **It only kicks in with a CIF** (the one that starts with a letter, such as B12345678). With a DNI, an NIE or a VAT number from another country the panel does not appear: you enter that by hand.
- **You may get 'No data found for this CIF'**, or a result with a name but no address. The name comes from the Agencia Tributaria's register and the address from a supplementary source that does not cover every company. It is not an error: fill in whatever is missing and save.

Always check the name before saving. The register returns the full **registered company name** (`ACME SOCIEDAD LIMITADA`), which is rarely the trading name you know the customer by. The invoice must show the registered company name.

It works the same way when creating and when editing a customer.

Step 4: The address: required, but not for the reason you think

For companies and self-employed customers, the billing address is required because **it is what gets printed on the invoice** and what the invoicing regulations require to identify the recipient. That is the reason, and it is enough.

What the address does NOT do is choose the tax. This is a widespread misconception and it is worth clearing up: when issuing, Fube **copies** the customer's address onto the document as it is, but does not read it to decide whether IVA, IGIC or IPSI applies. Entering an address in Las Palmas does not turn your invoice into an IGIC one. That is decided on the invoice, line by line, as explained in the guide on **taxes on your invoices**.

If the customer moves, edit the address here: invoices already issued keep the details they had (they are never rewritten) and new ones will show the new address.

Step 5: The tax profile, which is not the rate either

The **Taxes** section has only one field that matters: **Assigned tax profiles**. And it does not choose the rate that applies; it chooses **how each line of the invoice is classified for tax purposes**: the scheme, the transaction code and, where applicable, the exemption reason. That is exactly what is sent to the Agencia Tributaria with Verifactu and what goes into the Facturae XML.

Fube looks for a profile that accepts each line's tax and does so **in this order**: first the **product's**, then the **customer's** and, if neither fits, **your company's**. That is why the customer's profile is only needed when that customer is the exception: someone you invoice with IGIC, with equivalence surcharge, under the cash accounting scheme or with a specific exemption. For the ordinary Spanish customer, your company's general profile is enough and this field can be left empty.

The optional details that save work later

- **Email**: the address Fube sends invoices and payment reminders to. Make it the accounts department's, not your contact person's.
- **Billing phone**, and in the same **Contact** section, fax and website.
- **Document language**: also under **Contact**: the language in which they receive their invoices, quotes and delivery notes, the emails that carry them, the reminders and their portal. Spanish by default, and there are seven to choose from. What is translated and what is not is explained in the guide to **sending your invoices in each customer's language**.
- **Reminders**: switches on automatic payment reminders for this customer, with their grace days and, if you wish, an alternative email for the notices. How to chase and collect payments is covered in **payment management**.
- **Customer status**: Active, Inactive, Prospect or Review. It is **your own label**, to keep yourself organised: marking someone as Inactive **does not hide them** from the selector when invoicing or stop them receiving documents. If what you want is to stop seeing them, filter by status in the list.
- **Alias, colour and logo**: to recognise them at a glance in lists.
- **Ledger account**: in the **Internal use** section: this customer's sub-account in your accountant's books, 6 to 12 digits long. If you leave it empty, Fube assigns the next free one (430…) the first time the customer appears in an export to A3 or Sage 50; if your accountant already has them in their chart of accounts under a different one, enter it here so they match. This is covered in the guide to **exporting to A3 and Sage 50 for your accountant**.
- **Sales details (CRM)**: sector, company size, customer source and annual turnover, if you track sales.

After saving: contacts, bank accounts and follow-up

There are three things that **are not in the form** — neither when you create the customer nor when you edit them — and that you manage from **their record**, the screen that opens when you click the customer in the list. Contact people and bank accounts are in the side column, each section with its **+** to add one, and follow-up is in the **Timeline**. They are among the most useful parts of the record:

Contact people. A company rarely has just one contact. Here you record everyone you deal with, each with their **role**: **Main**, **Billing**, **Technical**, **Sales** or **Other**. Only the name and role are required; surname, email, phone and job title are optional. The trick that saves lost emails: mark someone as **Main** and record the **Billing** person separately, so each thing goes to the right person. Deleting a contact does not affect the customer's invoices: it only removes them from the address book.

Bank accounts. This is where the customer's **IBAN** and **BIC** go, with a name to tell them apart if they have several. It's what you need to collect payment by direct debit; how it works is explained in create a SEPA mandate. If you're coming from an older version of this guide: **the IBAN is no longer stored in the customer form**, but in this section of their record.

Follow-up. Notes are written at the top of the **Timeline** — the customer's history, with what you have issued them and what they have paid you —, where it says 'Write a follow-up note…', and saved with **Save note**. This is the internal history: conversations, calls and agreements, each entry with its date and author, and **never overwritten**. You can **pin** a note so it stays at the very top — 'only accepts invoices as signed PDFs', 'pays at 60 days' — which is exactly what stops a colleague from putting their foot in it. The customer sees none of this, not even from the Customer Portal.

For anything with a date — a call that needs to be made on Tuesday — don't use the follow-up: use a follow-up activity, which has an owner and a reminder.

Edge cases and common errors

- **‘The NIF/CIF/NIE/DNI/VAT is not valid’.** It fails its check digit. Go through it digit by digit; it's a typo 99% of the time. If the identifier has fewer than nine characters, the warning is different and tells you so.
- **It won't let me save and I can't see what's missing.** It's almost always a company or a self-employed customer with the address only half filled in. Check street, number, postcode, city, province and country.
- **‘A customer with this name already exists in the company’.** The billing name is unique in your account. If they really are two different customers with the same company name, tell them apart in the name; if it's a duplicate, keep the correct one.
- **An individual without a NIF for a small amount.** Create them as an individual, and for the sale a **simplified invoice** may suit you, as it doesn't require the customer's full tax details: simplified invoice.
- **The customer changes their NIF.** Create a new record. Don't edit the NIF of a customer with issued invoices: it would affect your books.
- **I want to delete a customer and it won't let me.** Only customers with no invoices or quotes can be deleted. If they have a history, the way to go is to set them as **Inactive**.
- **I've reached my plan's customer limit.** The number of customers is limited by plan. You can see the limits on pricing; if you're running short, the way to go is to upgrade your plan.

Frequently asked questions

Do I have to fill in every field to save a customer?

It depends on the type. An **individual** can be saved with little more than the name. A **company** or a **self-employed** customer need the tax identifier and the full address from the outset: the form won't let you save without them.

Does the customer's address change the IVA on my invoices?

No. It's copied to the invoice, but it doesn't determine the tax. The rate is chosen on the invoice, line by line.

Can I create the customer while I'm making the invoice?

Yes. Type their name in the Customer field and create them from there: when you save, they're selected on the invoice you were working on. You can see this in **create your first invoice**.

Where do I store the IBAN to collect their payments by direct debit?

In the **Bank accounts** section of their record, in the side column. It's not in the form, neither when you create the customer nor when you edit them.

Why isn't this customer's data being autocompleted?

Autocomplete is only triggered by a **company CIF**. With a DNI, a NIE or a VAT number from another country the panel doesn't appear. And even with a correct CIF there may be no data: you fill it in by hand and the customer is saved all the same.

How many contact people can I have per customer?

As many as you need, each with their own role.

Add your first customer

Choose the entity type, enter the identifier — and if it's a CIF, let Fube fill in the rest —, complete the address if it's a company or self-employed, and save. You can add contacts, the IBAN and the follow-up later, when you need them. **Create your free account** and get your customer base ready, or see everything you can do with it in **customer management**.

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