Fube

GUIDE

How to create a pro forma invoice in Fube (step by step)



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> You have a customer who needs to see the price and terms in writing before making up their mind, or who is going to pay you part of the work in advance, but it is not yet time to issue a real invoice. That is what the **pro forma invoice** is for: a document that looks like an invoice but **has no tax effect**. This guide explains, step by step, how to create a pro forma invoice in Fube, send it and convert it into an invoice the day the customer says yes.



Before you start

Two ideas worth being clear on so you do not confuse the pro forma invoice with an invoice:

- **The pro forma invoice has no tax or accounting effect.** It is not recorded in the accounts, it does not accrue IVA, IGIC or IPSI with the AEAT and it is not sent to Verifactu. It is a commercial offer or commitment, not a valid document for deducting or declaring. What produces tax effects is the **final invoice**, not the pro forma invoice.

- **The pro forma invoice uses its own series.** It has numbering independent from that of your invoices, so issuing pro forma invoices does not affect your tax numbering or leave gaps in it. If you have not set up any series yet, the guide on **how to create a numbering series** will help before you continue.

To create the pro forma invoice, the customer needs to be registered. If they are not yet in your account, you can **create the customer record** first, or add them from the pro forma invoice form itself.

Step 1 — Open the new pro forma invoice form

Go to the **pro forma invoices** list and click to create a new one. Fube opens a form very similar to the invoice form, because the pro forma invoice is filled in the same way: customer, date, line items and taxes. The difference lies in what it does afterwards, not in how it is put together.

If you want to see the full picture of this tool before you start — statuses, conversion and its own series — you will find it on the **pro forma invoices** page.

Step 2 — Select the pro forma invoice series

Choose the **pro forma invoice series**. It is a required field: without a series the document cannot be created. As you select it, the form shows the **next number** that will be assigned in that series, so you know what number the pro forma invoice will have before saving it.

The year in that number comes from the **pro forma invoice date**, not from the day you create it. If you date it in another year — one dated 30 December that you prepare in January, for example — the provisional number automatically switches to that year's numbering.

Remember that this series is **independent from that of your invoices**. You can keep a separate pro forma invoice series (for example, with its own prefix) without affecting the sequential numbering of your invoices.

Step 3 — Choose the customer and add the line items

Select the **customer** the pro forma invoice is addressed to. If they are not registered, you can create them without leaving the form.

Next, add the **detail lines**: each item with its quantity, its price and its corresponding tax. It works just as on an invoice, so the document reflects the exact amount and the terms as they will be. The difference is that here those amounts do not produce tax effects: they let the customer see the real total of the transaction before committing.

If you need a refresher on how to fill in line items, taxes and IRPF in this type of form, the guide on **creating and issuing your first invoice** covers that in detail, step by step.

Step 4 — Complete the date and terms

Enter the **transaction date** and the **due date**. Both are required and start out empty, so do not overlook them: on a pro forma invoice, the due date acts as the **offer validity date**, and the field itself suggests fifteen days from the pro forma invoice date as a guideline. The transaction date can be today or earlier, never later, just as on an invoice: the calendar will not let you pick a day that has not yet arrived.

Setting it is not a formality. If you later convert a pro forma invoice whose due date has already passed, Fube warns you on the conversion screen — 'This pro forma invoice expired on..., its validity ended N days ago. You can invoice it anyway... but first check that the prices and terms still stand'. **It does not block you**: a customer accepting late is normal. But it stops you invoicing a two-year-old offer without realising.

That is also where the small print lives. Fube **does not have separate 'validity' or 'terms' fields**: whatever you want the customer to read — the deposit percentage, the delivery time, how long you will hold the price — goes in the **notes** or the **footer**, which are printed on the PDF.

Step 5 — Save the pro forma invoice

Save the document. The pro forma invoice is recorded with its series number and appears in your list, where you can track it by status. In Fube a pro forma invoice can be **pending**, **accepted** or **rejected**, so you can see at a glance which ones are still awaiting a reply.

Marking it as rejected is not just for information. A rejected pro forma invoice is dead for all practical purposes: the **Convert to…** submenu disappears from its menu and, if you go there via the direct URL, the screen tells you that 'this pro forma invoice has been rejected and cannot be converted into an invoice'. If the customer changes their mind after rejecting it, the way forward is to **duplicate it** and carry on with the copy.

Step 6 — Send it to the customer

From the pro forma invoice's actions menu you can **send it by email** or **generate a link** to share it, as well as **download it as a PDF**. The customer receives a formal, numbered document with clear terms, without you having issued any real invoice yet.

As the pro forma invoice has no tax effect, if there is negotiating to do you can **edit it and resend** the updated version without having to issue any corrective invoice. That flexibility is exactly what sets it apart from an invoice that has already been issued.

Step 7 — Convert it into an invoice when the customer accepts

When the customer says yes, open the pro forma invoice and click **Convert to invoice**. The other destinations are in the **Convert to…** submenu — under **More**, or in its row menu in the list — which offers three: **Convert to invoice**, **Convert to delivery note** and **Convert to quote**, as appropriate. When you convert it into an invoice, Fube immediately creates the invoice **as a draft** and opens it for editing: it inherits the customer, the lines and the amounts from the pro forma invoice, so you do not have to retype anything, and you issue it once you have reviewed it. Only if the draft is missing some information that Fube cannot fill in by itself is nothing created; instead, the conversion screen opens first, with everything filled in, so you can complete it and save.

And it can only be converted once. If you try again on a pro forma invoice that has already generated its invoice, Fube refuses with an explicit message: *'This document has already been converted into an invoice. It cannot be converted again.'* This is deliberate — it prevents invoicing the same thing twice — but it is worth knowing before you click: if the resulting invoice has something wrong and **is still a draft**, edit it; if you have already issued it, the way to go is a **corrective invoice**, not converting the pro forma invoice again.

From that moment, tax comes into play: it is the **invoice** — not the pro forma invoice — that takes a number from your invoice series, accrues the applicable tax and enters the Verifactu flow. In Fube, with Verifactu already activated, every invoice **is sent to the AEAT as standard**, without you having to do anything invoice by invoice. If you have not activated it yet, this conversion screen **does not open**: instead you will see the screen that takes you through completing activation, because without it there is no invoice to issue. The guide on **how to get started with Verifactu** explains it in full, and the details of submission are in **submission to the AEAT with Verifactu**.

Pro forma invoice or quote: which one

They are both documents that come before the invoice and they get mixed up every day, because both include a customer, lines and amounts and neither has any tax effect. The difference is not in the format: it is in **what stage of the sale you are at**.

	Pro forma invoice	Quote
At what point	The price is already agreed	You're still selling
What it asks of the customer	To pay, book or process something	To accept a proposal
What it looks like	An invoice	A sales offer
Typical cases	Advance payment, firm booking, dealings with a bank or customs	Proposal open to negotiation, comparing scope and options
Numbering	Its own series, separate from invoices	Its own series, separate from invoices

In short: if what you need is **to get paid or get a booking** with a document that looks like an invoice, it's a pro forma. If what you need is **a yes** to a proposal that can still be discussed, it's a quote — and you'll find it in the guide to **creating and sending a quote** and on the **quotes** page.

Edge cases and common mistakes

- **Treating the pro forma as an invoice.** A pro forma is neither deductible nor declarable and does not give rise to tax with the AEAT. Don't hand it over as tax evidence: that's what the invoice created from it on conversion is for.
- **Thinking the pro forma is sent to Verifactu.** It isn't. Only invoices with tax validity go into that flow. The pro forma stays out of it until you convert it into an invoice.
- **Wanting to change something already sent.** As it has no tax effect, the pro forma can be edited and resent without corrective invoices. However, once you convert it into an invoice and issue it, any changes follow the rules for an invoice.
- **Mixing up the numbering.** The pro forma's number comes from its own series. The final tax number is assigned by the **invoice series** on conversion, so your invoice numbering stays sequential with no gaps.
- **You rejected it and now the customer accepts.** A rejected pro forma can no longer be converted. Duplicate it and work on the copy.
- **'This document has already been converted into an invoice.'** You've already converted it once. Look for the resulting invoice instead of creating another: if it's still a draft, edit it; if it's been issued, correct it with a corrective invoice.
- **The pro forma has expired and you still want to invoice it.** You can: the expiry warning doesn't block it. Just check beforehand that the prices still stand.

Frequently asked questions

Does a pro forma invoice have tax validity? No. It's a commercial commitment with no tax effect: it isn't recorded in the accounts, it isn't deductible and it doesn't replace the invoice. For the transaction to have tax effects you need to issue the corresponding invoice, which is what produces those effects.

Is the pro forma sent to the AEAT or to Verifactu? No. The pro forma stays outside the Verifactu flow. Only when you convert it into an invoice and issue it is that invoice recorded and sent to the AEAT, like any invoice in Fube.

Can I collect an advance payment with a pro forma? You can **request** it with one: the pro forma sets out the amount and terms in writing. But **collecting** it does have a tax effect. The IVA on an advance payment becomes due on the day you receive it, on the amount received (article 75.Dos of the IVA Law), so on that day you issue an **advance payment invoice**, with its IVA and, if the customer is a business or professional, its withholding. On the final invoice you deduct the amount paid in advance with a negative line. For how to do it, see **how to invoice an advance payment**.

If what the customer advances you is to pay fees or expenses **on their behalf**, it isn't an advance payment but money on account, and it follows a different route: **disbursements and money on account**.

Can I convert the same pro forma into an invoice twice? No. A pro forma generates **a single** invoice; a second attempt is rejected with a warning. If you need to invoice the same thing again, duplicate the pro forma or start from the invoice already created.

What is kept when converting the pro forma into an invoice? The invoice inherits the customer, lines and amounts from the pro forma. It takes its final number from your invoice series and its date from the day you issue the invoice. You can review and adjust it before issuing it.

Create your first pro forma with no commitment

The pro forma is the way to put a price and terms in writing without tying yourself to an invoice just yet, and to convert it into an invoice the day the yes arrives without redoing the document. If you want to see it from start to finish, **create your free account** and set up your first pro forma invoice; when the customer accepts, you convert it into an invoice with its details already in place.

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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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