Fube

GUIDE

How to set up your product and service catalogue in Fube



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> Invoicing the same thing twice and typing it twice are two different things, and the second isn't necessary. The **catalogue** is the list of what you sell — each item with its price and tax already decided — and its only purpose is that, when you create an invoice, you type three letters and the whole line appears. Setting it up takes half an hour on day one, and in return you avoid the mistake of typing 10% where 21% should have gone.

That's what this guide is about: creating products, organising them, adding them in bulk if you already have them in an Excel file, and knowing what happens the day you stop selling one.

Before you start

There's nothing to activate: the catalogue is available from day one and on every plan, including the free one — which allows up to **50 products**; beyond that, the limit rises with your plan. The only thing worth deciding before you start is **which tax applies to each thing you sell**, because that's the information that carries over to every future invoice.

If you're not yet sure which rate to apply to what — IVA, IGIC or IPSI depending on your customer's territory — read the guide on **taxes on your invoices** first. Here we assume you already know.

Step 1 — Create your first product

There are two ways, and you'll end up using both.

From the module. In the side menu, go to **Inventory › Products** and click **Create product** — or press the `N` key, which does the same. This is the way to go when you sit down to set up the whole catalogue in one go.

From the invoice itself. When you're adding a line and the product doesn't exist yet, the selector offers you **Create product for the catalogue**. You create it right there, without leaving the invoice, and it's available for the next one. This is the natural way: the catalogue ends up filling itself, invoice by invoice.

The same applies to **Inventory › Categories**, which sits in the same menu group alongside delivery notes and orders.

Step 2 — The fields that make a difference

The form has more fields than you need to look at. These four are the ones that change the result; the rest are self-explanatory on screen.

The product type: Goods or Service. It sits between the category and the description, defaults to **Goods** and is the one most people overlook. It isn't a decorative label: it's what allows **intra-community transactions** to be classified correctly, where goods and services aren't taxed the same way. If you sell hours, set it to **Service**.

The price and the tax, which are calculated both ways. You have three boxes — unit price excluding tax, tax and total including tax — and they work **in both directions**: if you type the net amount, Fube calculates the total; if you type the total, Fube works out the net amount. That's more useful than it seems when you sell to consumers and what you've decided on is the shelf price, with tax already included. By default, a new product starts with **IVA 21%** and a price of 0.

The status: active or inactive. An active product appears in the selectors when you create documents; an inactive one disappears from them but **remains on every invoice it's already on**. It's the lever for removing things from day-to-day use without touching your history, and we'll come back to it at the end.

Tax profiles, which are almost always left empty. This is the field for forcing a specific tax regime on this product — for example, a special AEAT regime. If you leave it blank, the product **inherits the customer's profiles and, failing that, your company's**, which is what you want in the vast majority of cases. Only fill it in deliberately: when you do, **it overrides both the customer's and the company's**.

The **reference** (your SKU) is optional, but if you sell physical products, add it from the start: it's what lets you search for them by code rather than by name.

Step 3 — Organise with categories before you have fifty

A category is a name, a description and a colour, and it keeps the list readable as the catalogue grows. You create them in **Inventory › Categories**.

There's no need to invent a taxonomy: group by how you sell, not by what the product is. Professional services, licences, training, maintenance, materials… Whatever lets you filter the list and find something in two seconds.

Categorise **from the start**. Recategorising a hundred and twenty individual products is an afternoon nobody ever sets aside.

Step 4 — Use it when invoicing

With the catalogue set up, creating an invoice is a matter of typing the name on the line and selecting it: the description, price and tax are filled in for you. You can change any of the three on that particular invoice without the catalogue product being affected — the catalogue price is a suggestion, not a life sentence. And if the customer has a price list or their own price for that product, the suggestion is theirs instead of the catalogue's.

And the other way round: **changing a product's price doesn't affect any invoice already issued**. Each line keeps the amount it was issued with, so raising your rates in January doesn't rewrite last year's. The change applies to whatever you do from that moment on.

You'll find the full walkthrough of an invoice, with taxes and IRPF, in the guide on **creating and issuing your first invoice**, and the module details on the **product catalogue** page.

Step 5 — If you already have your catalogue in Excel, upload it in bulk

Don't type it in. The wizard is in **Utilities › Import data** — not in Settings, which is where many people look for it — and it works the same way as with customers: choose **Products**, download the template, fill it in and upload it.

Two things worth knowing before you open the template:

- **The columns come with the technical field name, in English** (`name`, `reference`, `price`, `tax`, `category`...), not in Spanish. This is the template that Fube generates and the one Fube expects back: do not rename the headers or convert it to another format.
- **Only templates generated by Fube are accepted in the final upload.** If your catalogue is in your own CSV or Excel file, upload it in the get template step so that Fube fits it into its own, and that is the one you import.

Data import **is a paid module**: it is not available on the free plan, and is included from the Pro plan upwards. If you are on the free plan and have twenty products, it is more worthwhile to type them in; if you have four hundred, take a look at the **plans**. The step-by-step of the wizard, with the 'create only' versus 'create or update' mode and the row-by-row error report, is covered in the guide on **importing customers from Excel**: the flow is the same.

For the way back you do not need any module: in the list, select the products you want, open the actions menu and use **Export products**, in XLSX or CSV. It exports what you have selected, not the whole catalogue.

When you stop selling something: deactivate, don't delete

This is the mistake that most often has to be undone.

If you try to **delete** a product that appears in a document, Fube won't let you and tells you exactly where it is used: *'Cannot delete "X" because it is in use in 3 invoices, 1 quote...'*. And it really does count everything: invoices, simplified invoices, corrective invoices, quotes, pro forma invoices, delivery notes, orders, recurring invoices and CRM opportunities.

It is not a nuisance: deleting it would leave all those documents **without the link to what was sold**, keeping the amount but losing the trail, and that cannot be undone.

The way out is the one the message itself suggests: **deactivate it**. It stops appearing when you create new documents and the history stays intact. To reactivate it, edit it and set it back to active.

You can only truly delete a product that **does not appear in any document**: one created by mistake, or a duplicate you never got round to using.

Edge cases and common mistakes

- **A price that changes with every sale.** Leave the price at 0 in the catalogue and enter the amount on each invoice. The product is still useful so you don't have to rewrite the description and the tax.
- **Different prices per customer.** The catalogue stores **one price per product**, the same for everyone. For the installer or the wholesaler who pays a different one, create a **price list** in **Inventory › Price lists** and assign it to them, or give the customer a **custom price** on their record: when you add the catalogue product to their invoice or quote, the line takes that price, and it can be changed. How to set it up is explained in price lists and customer prices.
- **You sell in the Canary Islands, Ceuta or Melilla.** The applicable rate is determined by your **customer's** territory, not yours. If you invoice on both sides, keep separate products or change the tax on the line.
- **You have created a duplicate.** Search by reference or by name before creating one. If there are already two and both have been used, deactivate the one you don't want and carry on with the right one.
- **You need to know what changed and when.** Each product keeps a **version history** accessible from its menu: this is where you can see a price change with its date.
- **You want to know which invoices you sold a product on.** On its record, open **More › View invoices with this product** —it is also in the menu on its row in the list—: the **Invoices** list opens with the **Product** filter applied, which can be combined with the issue date or customer filter and removed with its cross. It shows the invoices that include it on any line, even if it is no longer active; simplified invoices are not included, because they have their own list. The **Product** filter is also available in the invoice list itself, without going through the record.
- **You are looking for the statistics of a single product.** There is no statistics page per product: what there is is an aggregated ranking of the best sellers, the **By product or service** card in **Sales › Overview**, and **only with advanced statistics**, which are not on the free plan. Each row of the ranking opens the invoices for the period that include that product. More in product statistics.

Frequently asked questions

Can I have a product priced at €0?

Yes. It is useful for samples, for items at no cost and for anything quoted to measure: you enter the amount on each invoice.

How do I apply a discount to a product?

On the document line, not on the product record. The discount belongs to that sale, not to the product.

If I change the price, are my invoices recalculated?

No. Issued invoices keep the amount they were issued with. The new price applies to the documents you create from that point on.

Does an inactive product disappear from my old invoices?

No. It is no longer offered when creating new documents, and that is all: where it already was, it stays.

Can I import products on the free plan?

No. Data import is included from the Pro plan upwards. Creating them by hand, on the other hand, has no plan restrictions at all.

Set it up once and forget about it

The catalogue is not a module you need to master: it is thirty seconds per product, done just once, so that every subsequent invoice takes half the time and never has the wrong tax. Start with the five or six items you invoice every week and let the rest fill up from the invoices themselves. **Create your free account** and set up yours, or see everything covered by **Fube invoicing** before you start.

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START TODAY

Put this into practice with Fube

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