Fube

GUIDE

# How to create and issue your first invoice in Fube



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> Your first invoice is the most daunting one: you don't want to get the number, the IVA or the customer's tax details wrong. The good news is that in Fube the system takes care of all that behind the scenes —sequential numbering, taxes, legal record-keeping— leaving you with what really matters: deciding who you're invoicing, which items to include and pressing the **issue** button when everything is in order. This guide takes you from the empty screen to your first issued invoice, with its PDF and its QR code, without you needing to know anything about Verifactu to get started.

## Before you start

You need four things sorted:

- **Verifactu activation completed.** This is the one that catches most people out, because it isn't done from the invoice: until you complete it you can **prepare drafts but not issue them**, and when you press Issue it will tell you so. It's a one-off wizard — reviewing your company details and signing the agreement with your certificate, on your own computer— and it's covered in full in the guide on **how to get started with Verifactu**. It's included in all plans, including the free one, but **included is not the same as activated**.
- **Your full tax address.** Fube won't let you issue invoices if it's missing. If, when you press issue, you see the message ‘Complete your company's tax address before issuing invoices’, go to your company settings, fill it in and come back. The address appears on the invoice itself.
- **The customer you're going to invoice**, whether you already have them or create them on the fly.
- **Knowing what you're charging**: the items (products or services), their price and their tax rate. If you're a professional and apply IRPF withholding, bear that in mind too.

Invoicing is available on **all Fube plans**, including the free one, so you can do this from day one. Each plan has an annual invoice allowance; you'll see it if you get close to the limit.

## Step 1 — Choose or create the customer

Go to **Sales › Invoices** and press the button to create a new invoice. The first thing it asks you for is the **customer**.

- If you've already added them, search for them and select them: Fube retrieves their name, their NIF and their tax address automatically.
- If they're new, create them there and then without leaving the invoice. Be aware of what it will ask for: if the customer is a **company** or a **self-employed** person, the form requires the NIF **and the full billing address** —street, number, postcode, province, city and country— before saving. Only for an **individual** is the name enough. Have those details to hand or the customer setup will be left half-finished with the invoice open.

If you'd rather prepare them beforehand, manage them from their own section —you'll find the details in customer management—. The customer's details are what will be printed, so make sure their NIF and address are correct.

## Step 2 — Add the items (the lines)

An invoice is, at heart, a list of **lines**: each line is an item you charge for. For each one you enter:

- **Description**: what you are selling or what service you are providing.
- **Quantity** and **unit price** (excluding taxes).
- **Tax** for that line. This is the key tax point: tax is chosen **line by line**, not for the whole invoice. By default Fube suggests **IVA 21%**, but you can change it to IVA 10%, 5%, 4% or 0% (the mainland rates), to **IGIC** if you operate in the Canary Islands, to **IPSI** if you are in Ceuta or Melilla, or mark the line as **exempt**. Each item can carry the rate that applies to it.

You can bring in items from your **product catalogue** so you don't have to type them every time — it's covered in the guide on how to set up your catalogue — or type them in manually if it's a one-off. As you add lines, Fube automatically calculates the taxable base, the tax and the total.

## Discounts: there are two kinds

Reducing one line is not the same as reducing the whole invoice, and Fube distinguishes between the two:

- **Product discount**, applied to a specific line. Useful when you reduce the price of one item and the rest are at the standard rate.
- **Discount on the whole document**, applied to the total. This is the classic '10% for prompt payment'.

Both are itemised in the totals panel, so the customer can see where the reduction comes from instead of finding an odd price with no explanation.

## The two dates, and why the due date is set at 15 days

The **transaction date** is the date of the sale or service and defaults to today. The **due date** is the payment deadline, and Fube suggests **15 days from today**: this is a fixed starting value, not something taken from the series or the customer record. If you get paid at 30 or 60 days, change it manually on each invoice.

The document **description** is the title or internal reference you will see in the list and on the PDF. It allows up to 255 characters: it's a headline, not a place to describe the project — that's what the notes are for.

## If you are a self-employed professional: IRPF withholding

If you issue professional invoices subject to **IRPF withholding** (the percentage the customer withholds from you and pays to the tax authorities on your behalf), enable it on the invoice and enter the rate (for example, 15% or 7%). **All lines** follow that rate, and Fube subtracts it from the total so that the amount to be paid comes out right. If a line should not have withholding, or has a different rate, you change it for that line only in its tax details: it's covered in **IRPF withholding line by line**. If withholding doesn't apply, leave it disabled.

## Step 3 — Choose the series

Every invoice belongs to a **series**, which determines its numbering. Choose the series and Fube takes care of the rest: it assigns the **sequential number, with no skips and no gaps** at the moment of issue (not before). The law requires consecutive numbering, and a gap or a duplicate number is exactly the kind of error that causes headaches in an inspection; Fube prevents it by design.

If you work with several series (one per year, per document type or per branch) and want to organise them, take a look at how **series and numbering** work. For your first invoice, the default series works perfectly well.

## Step 4 — Review the draft

While you are filling it in, the invoice exists as a **draft**. In that state you can change everything as many times as you like: add or remove lines, correct amounts, adjust the customer. The draft does not yet have a final number or any tax effect; it's your working space.

Before the next step, review it carefully: the **customer** and their NIF, the **items** and their amounts, the **tax** on each line, the **IRPF** if you apply it and the **series**. Check that the total matches what you expect to be paid; what you see here is exactly what will appear on the PDF.

## Step 5 — Issue the invoice

Once everything has been reviewed, click **Issue**. Fube shows you a confirmation ('Confirm issue') with the invoice number and date and reminds you to make sure the details are correct before continuing. **You always confirm the issue yourself**: Fube never issues an invoice behind your back. That click is the boundary between an editable draft and a legally valid document.

When you confirm, several things happen at that very moment, all automatically:

- The invoice receives its **sequential number** from the series and moves to the **issued** status. From this point on it can no longer be edited.

- It is recorded in line with **Verifactu** with its **chained fingerprint**: a unique signature (a hash) linked to that of the previous invoice, forming a chain that reveals any subsequent tampering. Once you have completed activation, this comes **as standard**: you don't have to touch anything invoice by invoice.
- The **PDF with its QR code** is generated, which allows the invoice to be verified and is the visible mark that the document is compliant.
- The record **is sent to the AEAT** (the Spanish Tax Agency) as part of Verifactu, also as standard.

**The message you'll see doesn't say 'Invoice issued', and it's worth knowing this.** With Verifactu enabled, when you confirm you get **'Invoice registered.'** followed by 'We are sending it to the AEAT. The result will appear on the invoice itself, in the Veri*Factu section'. This is neither a fault nor a half-finished document: the invoice already has its number and can no longer be edited; what remains pending is the Agency's response, which arrives within minutes and may be accepted, accepted with errors or rejected. Only once the AEAT accepts it will you see a plain **'Invoice issued.'**

In the meantime, you already have it: downloadable, ready to send to your customer and with every guarantee. If you want to understand what Verifactu is without the jargon, there's the guide to **getting started with Verifactu** and the details of **sending to the AEAT**; if the AEAT rejects one, the way back is in **resolving Verifactu errors**.

## What you can do with an issued invoice

Issuing is not the end. From the invoice's own actions menu you have, among others:

- **Send invoice** by email to the customer, with the PDF attached.
- **Generate link** so they can view or download it without signing up.
- **Add payment**, in full or in part, to keep track of the payment status.
- **Download invoice (PDF)**, with its QR code.
- **Duplicate invoice**, to reuse it as the basis for the next one: it instantly creates a draft copy, dated today, and opens it for editing.
- **Create corrective invoice**, if you spot an error.
- **Convert to…** delivery note, quote or pro forma invoice, when the same document needs to go out in another format.

- **Void invoice**, which is not the same as correcting it: it generates a **voiding record** that is also sent to the AEAT. Fube won't let you void it if the invoice already has corrective invoices linked to it: the two routes are mutually exclusive.

And **the list has three tabs**, which is where people get lost when looking for an invoice they can't find: **Issued**, **Voided** and **Drafts**. If you have just saved something without issuing it, it's in the third one.

## Edge cases and common errors

- **'Complete your company's tax address before issuing.'** Some of your company's details are missing. Go to settings, fill in the tax address and issue again.
- **You've made a mistake on an invoice that has already been issued.** It can't be deleted or edited — the law doesn't allow it. The correct approach is to issue a **corrective invoice** (a credit note that corrects the original). You'll find the details in corrective invoices.
- **You sell to a private individual for a small amount.** If it's less than €400, a **simplified invoice** (a receipt) may suit you better, as it doesn't need the customer's full tax details. This guide covers the standard invoice; the other types — pro forma invoice, quote, delivery note — are in the invoicing section.
- **You don't want it to take effect yet.** Leave it as a draft: it doesn't use up a series number and isn't recorded until you issue it.

## Frequently asked questions

**Do I need to understand Verifactu to issue my first invoice?** Understand it, no; **activate it, yes**. Activation is a one-off preliminary step and without it you cannot issue invoices —only prepare drafts—. Once that is done, Verifactu (the hash, the QR code, the submission to the AEAT) works behind the scenes: you create the invoice as usual and Fube takes care of compliance. The getting started with Verifactu guide explains both things without jargon.

**How do I apply IRPF if I am a self-employed professional?** Turn on IRPF withholding on the invoice and enter the rate (for example, 15% or 7%). All lines follow it except any line that has its own withholding in its tax details, and Fube deducts it from the total automatically. The tax (IVA, IGIC or IPSI) is chosen on each line.

**Does Fube guarantee that the numbering has no gaps?** Yes. The number is assigned on issue, sequentially and with no gaps within each series. You do not have to keep track yourself. The series and numbering page explains it in depth.

**What does my customer see if the invoice link won't open?** The screen tells them why, and in two of the three cases the link is still valid:

- **'Too many requests from your connection'.** Many documents have been opened in a row from their network, which is normal in an office or an accountant's practice sharing a single connection. It is a temporary limit: they should wait a minute and click **Try again**. There is no need to send them another link.
- **'The document could not be opened'.** PDF generation has failed. This is also temporary: they should try again in a few minutes. If it persists, email them the invoice in the meantime.
- **'Page not found'.** This one is real: the link has expired or is no longer active. Generate a new one from the invoice and send it to them.

**What if I invoice the same thing every month?** For periodic fees and retainers, set them up once as recurring and let Fube prepare each invoice for you (you just review and issue). You will find it in the guide to automating recurring invoices.

## Issue your first invoice

There is no mystery: choose the customer, add what you are charging with its tax, pick a series, review and issue. Legal compliance —numbering, hash, QR code, AEAT— is handled by Fube behind the scenes, and the decision to issue is always yours. Create your free account and have your first invoice issued in a few minutes. When you want to go further, recurring invoices and the rest of Fube invoicing are waiting for you.

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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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