Fube

GUIDE

How to set the default values for your invoices and documents in Fube



fube.es

Updated · 5 September 2026

How to set the default values for your invoices and documents in Fube

> If you choose the same IVA on every invoice, type the same payment terms and select the same series, you are doing by hand a job that Fube can have sorted out in advance. That is what **preferences** are: the values every new document starts with. You define them once per document type and from then on the form opens already filled in.

This guide goes through what you can set, what changes depending on the document type, and the two automations that really save time.

Before you start

You need to have created at least one **numbering series** for the document type you are going to configure, because the default series is a required field. If you don't have one yet, start with the guide to **creating a series**.

Where they are: one screen per document type

There is no single preferences screen. Each document type has its own, inside its own module:

Document	Where
Invoices and corrective invoices	**Sales › Invoices › Settings**, with one section for invoices and another for corrective invoices
Simplified invoices and their corrective invoices	**Sales › Simplified invoices › Settings**
Quotes	**Sales › Quotes › Settings**
Pro forma invoices	**Sales › Pro forma invoices › Settings**
Delivery notes	**Inventory › Delivery notes › Settings**

Each one is a single page, with its series and, below them, taxes and withholdings, the document texts and automatic sending.

It is a change of mindset from what you might expect: you don't go to Settings, you go to the document's module. The advantage is that each type can have its own tone and its own values, which is exactly what you need.

The settings they all have

Default series

The series that appears preselected when you create the document. You can still change it on each one, but this is the one suggested. If you almost always work with one, set it here and stop choosing it.

Default tax and its rate

The tax and the percentage applied to each new line item. Choose the one you use ninety per cent of the time — for most people, IVA at 21% — and correct the rest on the document itself.

If you operate in the Canary Islands, Ceuta or Melilla, this is where you choose IGIC or IPSI instead of IVA. You'll find the full picture in the guide to **taxes on your invoices**.

IRPF withholding

A switch to turn it on and a percentage — the general 15%, or the 7% for newly self-employed people. **It is available on every document type**, not just invoices: if you issue quotes with withholding, turn it on there too and the amount will add up from the very first draft.

Notes and footer

Two texts that are copied into the new document as a starting point. They support **rich text** — bold, italics, lists — and have a limit of **1,000 characters** each.

The difference between the two is where they appear: the **notes** go in the body of the document and the **footer** at the end. They are the natural place for what you always repeat:

- On **invoices**, the payment terms.
- On **quotes**, how long the offer is valid and whether prices include taxes.

- On **delivery notes**, the acceptance line and the space for the recipient's signature.

They are a template, not a requirement. You can rewrite them on each individual document.

The two automations

Both are available from the paid plans upwards; on the free plan you will see the switch with a label that takes you to upgrade your plan.

Automatic sending

With it turned on, **when you issue the document it is emailed to the customer automatically**. And it is not just a switch: you can prepare the whole email.

- **Recipient email** — leave it blank and the email of each document's customer is used, which is the usual approach. Fill it in only if you want everything always to go to the same inbox.
- **Subject and message** — with six variables that are replaced automatically: `{numero_documento}`, `{nombre_cliente}`, `{email_cliente}`, `{importe_total}`, `{fecha_emision}` and `{fecha_vencimiento}`.
- **CC emails** — up to **three addresses**. Useful for your accountant or for your own invoicing inbox.

A tip: turn it on once your invoicing routine is well established. With automatic sending, issuing and sending are the same action, and there is no moment in between to realise you had made a mistake.

Automatic payment

It only exists on **invoices and simplified invoices**, and it does what it says: **when you issue, a payment for the total amount is recorded automatically**, with the payment method and description you configure.

It is what you want if you are always paid in cash or before issuing. If you are paid at thirty days, don't turn it on: it would mark as paid what you are still owed. And even if you have it turned on, you can turn it off for a specific invoice from its own form.

The two settings only one type has

There are two things that aren't on the other documents and are worth knowing about.

On delivery notes: show prices or not. A switch decides whether the delivery note shows prices. Turn it off if the delivery note is signed by whoever receives the goods at the warehouse and you don't want them to see the amounts.

On simplified invoices: the format. You choose between **Ticket** — the narrow receipt format — and **Invoice** — the full single-page format.

And that setting has a surprising consequence: **simplified invoices in Ticket format do not use the design you have configured in the document appearance**. The ticket has its own layout and its own theme, and the theme, colours and logo you chose are ignored for them. If you want your simplified invoices to come out with your design, set them to **Invoice** format. The guide to customising the appearance of your documents also explains this.

Save and check

Click **Save**. The values apply to documents you create **from that point on**: those that already exist, including drafts, keep what they copied when they were created.

The best check is to open a new document and see the form already filled in. If something does not appear, either you have saved it in the wrong section (the corrective invoices one instead of the invoices one, for example), or you are looking at a different type of document.

Edge cases and common mistakes

- **'I have changed the default IVA and an old draft still has the other one.'** That is right: the draft copied the value when it was created. Change it manually in that document.
- **'I can't find the preferences in Settings.'** They are not in the account's general Settings. They are inside each document's module, in its own **Settings**.

- **‘I turned on automatic sending and an invoice I wanted to review has been sent.’** Sending is tied to issuing. Turn off the option in that specific document before issuing it, or switch off the automation until you have got the hang of it.
- **‘Automatic payment is inflating my cash flow.’** That is the sign that you do not get paid on the spot. Turn it off and record payments when they actually come in; the guide on payment management explains how.
- **‘My simplified invoice does not have my design.’** It is in Receipt format. Change it to Invoice format if you want your style and your colours.
- **‘I want different text for each customer.’** Preferences are per document type, not per customer. The default text is the starting point; edit it in the document when needed.

Frequently asked questions

Can I have different values per series?

Taxes and texts are per document type. What is defined per series is the **payment accounts**: the bank account and the digital payment account for documents in that series. And in a specific document you can choose a different one, in its payment section.

Do the changes affect documents already issued?

No. Only new ones.

Can I edit the notes and footer in a specific document?

Yes. They are templates: in each document you can rewrite them completely.

Does automatic sending use my email design?

Yes, it goes out with the look you have set up; if you have customised your emails, it uses that. The guide on branded emails explains it.

Can I copy my accountant in on all invoices?

Yes, with the CC emails field in automatic sending. It accepts up to three addresses.

Set it up once and invoice faster

Ten minutes per document type and you stop repeating the same IVA, the same text and the same series on every invoice. You will find the full details of the feature on the **document preferences** page, and if you do not use Fube yet you can **create your free account** and have it ready before your first invoice.

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.

fube.es

Invoicing and business management for freelancers and SMEs in Spain