Fube

GUIDE

How to enable and set up the customer portal in Fube



> ‘Could you send me the March invoice again?’ is one of those requests that seem to take two minutes and keep coming back, customer after customer, month after month, scattered across email and WhatsApp. The customer portal turns this around: instead of pushing documents out one by one, you open a space where each customer comes in and helps themselves. This guide explains how to set it up, give it your branding, decide what each customer can see and give them access with their email address.

Before you start

Three things:

- **A plan that includes the portal.** It isn't included in every plan — not even in every paid one — and without it the whole section takes you to the upgrade plan screen. You can check which plans include it on the **pricing** page.
- **The customer you're going to give access to, already set up**, ideally with their billing email address on their record: it's the one Fube suggests for the invitation. If they aren't set up yet, follow the guide to **create a customer**.
- **Your logo to hand**, if you want to customise the look.

There's nothing technical to set up or install: the portal lives inside Fube, under **Sales** → **Customer portal**. Note, however, that it's marked as **beta** in the app. It works, but it's worth knowing.

What the customer portal is (and isn't)

The customer portal is a dedicated website for each of your customers. There, each customer views and downloads **their own** documents — invoices, quotes, pro forma invoices, delivery notes —, accepts or rejects your quotes, completes their onboarding — accepts terms, uploads documents and signs whatever they need to sign —, signs the documents you send them, places orders from your catalogue if you enable it and, if you manage their projects in Fube, sees how the ones you share with them are going and downloads their monthly reports. Each person signs in **with their email address, with no password or account**, and only sees what belongs to their company. The website carries your logo and your colour, not Fube's.

There are three limits worth being clear about:

- **It doesn't include a payment gateway.** Your customer views documents, downloads them, signs their onboarding and places orders, but **doesn't pay online** within the portal: there's no card terminal or built-in card payment. You still manage payments yourself from Fube.
- **An order from the portal isn't a closed sale.** It reaches Fube as a draft sales order and you decide what to do with it; nothing is invoiced automatically.
- **Neither is an accepted quote.** You receive a notification and you convert it yourself into an invoice, pro forma invoice or delivery note, as usual.

How your customers sign in, in three ideas

Before the steps, it's worth understanding access, because it's what raises the most questions:

1. **You give access to one or more email addresses for a customer.** Each person receives an invitation with a **Go to the portal** button. That button is valid for **7 days and can only be used once**.
2. **Once in, they stay in.** The session lasts **30 days from the last time they sign in** on that browser: as long as they keep using it, they don't need to identify themselves again.
3. **When the session expires**, they go to your portal's address, enter their email address and receive a new button, valid for **15 minutes and only once**.

The portal address **contains nothing secret**: you can copy it whenever you like, put it on your website or in your email signature. What opens the door is the button sent to each person's email, not the address.

Step 1 · Set up the portal and choose its address

In the Fube app, go to **Sales → Customer portal**. Until you've opened the portal for the first time, that page **is the setup**: three blocks — **The address**, **Your branding** and **What your customers see** — with a preview alongside, **How a customer will see it**. Whatever you change **is saved automatically**, with no save button.

The first block is **the address**: the final part of your portal's public address, the part that comes after `/portal/` (for example, `/portal/estudio-nadal`). It only accepts lowercase letters, numbers and hyphens, with a minimum of three characters, and the panel itself shows you the full address in front of what you type.

Choose something your customers will recognise — your business name is usually enough — and that you won't want to change: it's the address you'll be handing out.

Step 2 · Add your branding

In the second block, **Your branding**, customise the look so the customer sees your business:

1. Upload your **logo**. It will appear in the portal header and on the sign-in screen.
2. Choose your brand **colour**, from the suggested ones or your own. It's the colour of the buttons and of the section the customer is in.

The customer will see your logo and your colour; Fube remains as a discreet note in the portal footer, 'Made with Fube', which is explained in the **Branding** tab further down. If you don't upload a logo, your initials appear in its place next to your company name.

For most people, this is enough: the logo in the header and the colour of the buttons are what make the portal feel like yours. If you also want your customers to see a name other than your registered company name — your trading name, for example — you set it later in the portal's **Branding** tab, which you'll see further down.

Step 3 · Choose what your customers see

The third block, **What your customers see**, decides which sections the portal has. It's a list with one option per line; tick the ones you want to show (at least one):

- **Documents** — the customer views and downloads their invoices, quotes, pro forma invoices and delivery notes, along with what they have outstanding, and accepts or rejects your quotes. It's the most common use of the portal, and for many the only one they need.

- **Catalogue and orders** — the customer sees the products you choose and places orders, which reach you as draft sales orders. When you tick it, the **Can place orders** switch appears next to it: when on, the customer adds products to a basket and sends you the order; when off, the catalogue is view-only. How catalogues are set up and what each customer sees is explained in the guide to **catalogue and orders in the customer portal**.
- **Customer onboarding** — the customer completes their onboarding, uploads the documents you ask for and signs contracts from their portal. How it's set up is explained in the guide to **customer onboarding and signatures in the portal**.
- **Projects** — the customer sees how the projects you share with them are going and downloads the monthly reports you publish for them. It only appears in the list if your plan includes Projects, and it comes ticked, because **on its own it doesn't show anything**: each project is shared deliberately, one by one, from its own settings. You'll see this a little further down.

The portal **Home** is always available: it's the first screen the customer sees and it can't be turned off, which is why it doesn't appear in the list. Anything you don't tick doesn't appear in their navigation.

This is **what applies to everyone**. You can remove something for a specific customer from their record, but never give them more than the portal has: you'll see this further down, in the section on a specific customer.

After setup, everything in these three steps — and a bit more, such as the welcome message or the name your customers see — is changed in the **Settings** and **Branding** tabs of **Sales → Customer portal**. You'll see this further down, tab by tab.

What the customer sees on their Home

It's the first thing they see when they sign in, and it brings together what requires their action: at the top, the **quotes awaiting a response** — each with its amount, how long it's valid for and the **View and respond** button — and the documents they have **to sign**; if they have onboarding left to do, the reminder to complete it; and below, what they have **outstanding**, how many documents they have, the most recent ones and, if you share any with them, their projects. If you don't have the Elite plan, a Fube card also appears there, which your customer can close: you'll see this further down, in the **Branding** tab.

What the customer sees in Documents

It's worth knowing how that screen behaves, especially with downloads, which can be surprising if you're not expecting it:

- **The list is paginated, with filters and a search box.** It loads twenty documents per page. The customer can filter by **type** (invoices, simplified invoices, quotes, pro forma invoices, delivery notes), by **date** (**This month**, **Last month**, **This quarter**, **Last quarter**, **This year**, **Last year** or **Between two dates**) and show only what is **outstanding**, with a button that also tells them how many documents they have outstanding. The **search box** looks at the **document number** and the **description**, ignoring case and accents: they can type part of the number or a word from the description, such as ‘maintenance’ or ‘servicing’. So if one of your customers has a long history and complains that they can't find something, get them to try a word from the description or the number.
- **The PDF opens in another tab, and its link expires after a minute.** When they click **View PDF**, Fube generates a signed link valid for **sixty seconds** and only for that document, and opens it in another tab; if your customer wants to save it, they download it from there, using the browser's viewer button. This is intentional: the link is designed for opening the PDF there and then, not for saving or forwarding. If your customer tells you a PDF link ‘doesn't work’, the answer is to go back to the portal and click again. And the reassurance: that link **doesn't carry their access**, so even if they forward it by mistake they aren't giving away the key to their portal.

Your quotes: they accept or reject them from their portal

Every quote you issue to that customer appears in **Documents** with its status (**Awaiting response**, **Accepted**, **Rejected** or **Expired**) and, those they can respond to, also on their Home page. When they open one awaiting a response, between the header and the lines they see that your company is waiting for their response, the deadline for giving it and two buttons: **Accept quote** and **Reject**.

Clicking either one opens a confirmation with an **optional note** (‘Note for’ your company when accepting, ‘Would you like to tell them why?’ when rejecting) and a line telling them what will be recorded: that they themselves are accepting or rejecting it, with their email address and at that time. On confirming:

- **The quote's status changes in Fube**, to Accepted or Rejected.

- **Fube keeps the evidence**: the name and email address of whoever responded, the date and time, the IP address they did it from and their note.
- **Your team gets notified**, those who can see quotes: in the bell and by email, with the subject '… has accepted quote …' or '… has rejected quote …', the amount, who it was and their note, and a **View the quote** button. The email depends on your company's **notification emails**; the bell always notifies.

On the quote's page, in Fube, the **Acceptance** section in the sidebar shows you who responded, **When**, **From** (their portal and the IP address) and their note. Until they respond, that section tells you whether they can do so from their portal and until when, and who at that customer has access; if nobody does, it offers you **Give access**.

What's worth being clear about:

- **Accepting it doesn't create the invoice.** You convert it yourself from the quote's menu, with **Convert to invoice**, **Convert to pro forma invoice** or **Convert to delivery note**, as always.
- **It can only be answered once.** They can't change their mind from the portal: if your customer makes a mistake or changes their mind, they write to you and you change the quote's status in Fube. If you set it back to Pending, they can respond again from their portal.
- **An expired quote can no longer be accepted.** Once its due date has passed, the portal tells them it has expired and to ask you for an updated one.
- **If you've already converted it**, even if they haven't responded, the buttons don't appear: you've already moved on.
- **They need to be able to see Documents** and the quote must be for that customer: a quote without a customer isn't shown to anyone.
- **Also from the link, without the portal.** The public link you generate from the quote, the one you send by email or WhatsApp, has the same two buttons for anyone without access to your portal; the guide to **creating and sending a quote** explains it. There is only one response, whichever way it arrives: if they've already responded one way, the other tells them it has been accepted or rejected.
- **You can't respond in the preview.** With **View as this customer** you see the buttons disabled: you can't accept or reject on their behalf.

What the customer sees in Projects

Ticking **Projects** doesn't show any project to anyone. Each project is switched on separately, in the project's own **Settings** tab, with the **Visible in the portal of** switch and the name of its customer, which is **off** by default. Until someone switches it on, that customer can't see it. And the **Projects** section doesn't even appear in their portal's menu until they have at least one visible.

With one switched on, the customer finds it in two places:

- **On their Home page**, under **Your projects**: one card per project with its status, the tasks completed and this month's hours. If you've published a report for them that they haven't downloaded yet, the card flags it (‘New: the report for’ and the month) with its **Download** button.
- **In Projects**, with a page for each one: at the top, **Progress** (the percentage and the tasks completed), **Hours spent** and **Expected delivery**; then **Reports**, with the ones you've published for them to download; and below, month by month with its arrows, that month's hours, the tasks completed, those still open with their hours and time logged without a specific task.

When you publish a report for them and tick the notification, each person with access receives an email **‘Here's your report for’** and the month, with a **View the report** button that takes them straight to that project, in the report's month and without a password. Like the invitation link, it is valid for **7 days and only once**; if it expires, they sign in with their email as usual and find it in Projects.

What they **never** see is who on your team did each thing, the comments, the attachments and the task descriptions, nor your rates, the budget or the amount invoiced (that only goes in the PDF of the reports you publish for them). And it is **read-only**: the customer views and downloads, but doesn't comment on or approve anything from there.

How to switch on each project and how to publish the monthly report is explained in the guide to tracking a project's progress and hours.

Step 4 · Open the portal

With the address, the branding and what your customers see set up to your liking, click **Open the portal**, at the end of the setup.

Opening it doesn't notify anyone. With the portal open, your customers can only get in once you give them access, which is the next step; until then nobody receives anything. So you can open it at your leisure, look at it as a customer will see it (with **View as this customer**, further down) and give access when you're ready.

As soon as you open it, the page stops being the setup and shows the **Customers** tab instead, which is where you give access and see who signs in.

Step 5 · Give your customers access

Click **Give access**, at the top right of the **Customers** tab. A side panel opens:

1. In **Customers**, search for and choose one or more customers.
2. For each customer, **the billing email from their record** appears, already ticked. You can untick it and **add more email addresses**: that of whoever handles their purchasing, that of their accountant. Each email address is a person with their own access, and they all see the same thing: that customer's information.
3. In **What they'll see**, leave **Same as your portal** (what you chose in step 3) or click **Choose for this customer** and untick anything you don't want them to see. They can never see more than your portal has, and you can change it later on their record.
4. Click **Send invitations**: the button tells you how many will go out, one per email address.

You can also give access from the customer's record, **Portal** tab, with **Give access**. If you do it there before opening the portal, the panel itself warns you that **the portal opens when those invitations are sent**.

What your customer receives

Each person receives an email with the subject **'Your company has given you access to its portal'** (with your company's name, of course: the one you enter in **Branding** or, if you don't enter one, your registered company name). Fube sends it on your behalf (the sender will show your company's name 'via Fube') and it contains your name and your logo.

And it reaches them in their language. That email, the ones that follow — the button to sign in, the signature requests, the signed copy, the monthly report notice — and the portal itself are in the language selected on their record, under **Document language**: Spanish if nobody has changed it, or English, Catalan, Basque, Galician, French or Portuguese. The first time, the page the button takes them to doesn't yet know who they are and appears in Spanish; as soon as they sign in, the portal switches to their language and that browser remembers it. The guide to **sending your invoices in each customer's language** explains this.

The email contains an **Enter the portal** button, which is valid for **7 days and can be used only once**. Clicking it opens a page on your portal with another **Enter the portal** button, and once they click that one they're in.

Why that second click: many business email antivirus programs open the links in a message before the person does, to check them. If simply opening the link were enough, the antivirus would use up the button and your customer would find that it's 'no longer valid'. With the second click, only the person who actually clicks it gets in.

Until someone signs in, the customer appears as **Invited**. **The first time each person signs in, a notification pops up in the Fube bell** for anyone on your team who can see the portal's **Customers** tab, so you know the invitation has arrived without having to ask.

How they sign in again later

- **While they keep using the portal, they stay signed in**: the session lasts 30 days from the last time they sign in, in that browser. If they want to end it sooner — on a shared computer, for example —, at the top they have **Sign out of the portal**, next to the email they signed in with.
- **When it expires, or they sign in from another device**, they go to your portal's address, enter their email and receive a new button. That one is valid for **15 minutes and can be used only once**.
- **The response is always the same**, whether or not that email has access: that way nobody can keep trying emails to find out who your customers are. If the email doesn't have access, it simply doesn't receive anything.
- **If the same email has access to several of your customers** — an accountant who handles two, for example —, they receive one button per customer, and sign in as whichever they choose.

You can copy your portal's address whenever you like with **Copy**, from the Customers tab or from any customer's record. It's a good idea to put it on your website or in your email signature: it's the door your customers use to come back in.

Step 6 · Keep track of day-to-day activity in the Customers tab

With the portal open, the **Customers** tab in **Sales → Customer portal** is the place where you see who signs in. At the top you have the portal's status (**Open** or **Closed**), its address with the **Copy** button and four figures:

- **With access**: how many customers, and how many people in total.
- **Unused invitations**, and when the first one expires.
- **Signed in this month**, out of all those with access.
- **Unfinished onboardings**, if you use customer onboarding.

Below, **one row per customer** — not per person — with their status, the people who have access, their last access and how their onboarding is going. You can filter by status and search by customer, NIF or email.

There are three statuses:

Status	What it means
Invited	You've given them access, but nobody from that customer has signed in yet
Has access	At least one person has signed in and still has access
No access	You've removed access for all their people

From each row's menu you can **Resend invitation** (or **Invite again**, if they have no access), **Open their record**, **View as this customer** — explained below —, **Copy portal address** and **Remove access**. When you resend, a new invitation goes to anyone who hasn't signed in yet, and the previous unused one stops being valid: only the latest one works.

Settings for a specific customer, on their record

Everything specific to one customer is configured in a single place: **their record, Portal tab** (in **Sales** → **Customers**, or with **Open their record** from the list). There you have:

- **People with access**: each email with its status, its last access or, if invited, when the invitation expires. You can resend the invitation or remove access person by person, and with **Add person** you invite someone else from that customer. As only the email is requested when you give access, each person appears without a name until you add one with **Add name**; you change it with the pencil on their row. With a name set, their Home page and the portal emails greet them by it (‘Hello, Elena’); without one, they just say ‘Hello’.
- **What they see**: **Your portal's settings** or their own modules. A customer's settings **can only restrict** the portal's, never extend them: if you switch something off for everyone, it's switched off for them too. And if you have chosen their own, anything you switch on later for everyone won't reach them until you tick it for them or go back to **Your portal's settings**.
- **Catalogue** and **Orders**, if they see the catalogue: which catalogues are assigned to them and whether they can order (**Like everyone else** or **Cannot order**). A customer cannot order if orders are switched off for everyone.
- **Onboarding**: how their onboarding is going and which one applies to them, the default or another. Below, what they answered in each step: the details they filled in, when they accepted the terms, the file they uploaded — with **Download** — and what they signed.
- **Projects**, if they see Projects and your plan includes them: that customer's projects, each with its **Visible on the portal** switch — the same one as in the project settings — and its status: **Not visible**, **Visible · no reports published** or, with one published, **Visible · report for** and the month of the latest one. Clicking the name takes you to that project's settings. The switch can only be changed on the projects you manage; on the others it appears disabled and, when you hover over it, says that only the owner or a manager of the project can change it.
- **Signatures**: what they have signed and what is pending, with the **Send for signature** button to request their signature on a document. Clicking a signature shows you its evidence.

- **Activity**: the invitations sent, their first sign-in, their latest accesses, what has been sent to them for signature and what they have signed, when they started seeing each project, who published each report for them and which of their people downloaded it, and who on your team has looked at their portal with **View as this customer**, which you also have on that tab.

How to set up onboarding and how to send a document for signature are explained in the guide to **customer onboarding and signatures on the portal**.

It's what you need the day a large customer asks for something different from the rest.

Removing access, and closing the portal

Remove access —for one person from their record, or for a whole customer from the list or with **Remove access for everyone**— does two things: if that person is inside, they leave the portal at their next step, and any buttons they hadn't used stop working. You can undo it with **Invite again**, which sends them a new invitation.

If what you want is to **close the whole portal**, click **Close the portal** in the **Settings** tab. While it's closed nobody can get in and you can't send invitations or documents to sign; anyone inside leaves at their next step and sees **'The portal is closed'**. Access isn't lost: when you open it with **Open the portal** —in **Settings** or in the closed-portal notice shown in the **Customers** tab—, each person gets back in with their email. Giving a customer access **doesn't reopen it**: only that button does.

The whole portal, in Sales → Customer portal

What you choose during setup isn't fixed. Everything to do with the portal is in **Sales → Customer portal**, spread across seven tabs in this order:

Tab	What it's for
Customers	Who has access, who has logged in and how their onboarding is going (steps 5 and 6 of this guide)
Signatures	What your customers have signed and what they still have to sign
Sign-ups	The steps a customer goes through when they log in for the first time (formerly 'onboarding' or 'flows')
Documents to sign	The contracts, mandates and so on that your customers sign (formerly 'templates')

Tab	What it's for
Catalogues	The products your customers see and who each catalogue is assigned to
Branding	Your logo, your colour and the name your customers see
Settings	Whether it's open, its address, the welcome message and what your customers see

Each tab appears if your role has permission for it, so you may not see them all.
Configuration no longer has a portal section: if you had any of its old addresses saved, it takes you to the tab that replaces it.

Signatures, **Sign-ups** and **Documents to sign** are covered in the guide to **customer onboarding and signatures in the portal**, and **Catalogues** in the one on **catalogue and orders in the customer portal**. The two remaining ones are these.

Settings

This is the tab for things you change every now and then:

- **Status**: **Open**, **Closed** or **Never opened**. When open, it tells you how many customers have access and how many invitations are still unused, and it has the **Close the portal** button, which asks you to confirm before closing it. When closed —or never opened, if you have never opened it yet—, it has **Open the portal**.
- **The address**: your portal's, **…**`/portal/tu-direccion`, with **Copy** and **Open**. This is the only thing that **isn't saved automatically**. When you type a different one, a notice explains what will happen: the current address stops working, including in the buttons of invitations nobody has used —you'll need to resend them—, and anyone already inside stays inside. You confirm it with **Save address**, and **Undo** leaves it as it was.
- **Welcome message**: a text for all your customers, up to 280 characters, shown on each one's Home page, below the greeting. If you leave it empty, nothing is shown. It's one for everyone: there's no different message per customer.
- **What your customers see**: the same list as in setup, one option per line: **Documents**, **Catalogue and orders** —with its **Can place orders** switch—, **Customer sign-up** and, if your plan includes Projects, **Projects**, which shows nothing until you switch on a project. At least one must stay ticked. This applies to everyone: you can take something away from a specific customer from their record, but never give them more.

Except for the address, everything in this tab is saved automatically. In the top right you also have the **View as a customer** button: you choose a customer and their portal opens in another tab, just as they see it (the next section explains this).

There's no longer a **Modules** screen: what your customers see is chosen here, in **What your customers see**, and the old Modules address takes you to this tab.

Branding

This is where you'll find everything that makes the portal look like yours:

- **Logo**: in PNG or SVG, with a transparent background. It appears in the portal header, on the login screen and in emails. Without a logo, your initials are shown.
- **Colour**: one of the five suggested or any other. It's used for the buttons and the section the customer is in; everything else keeps Fube's look.
- **Name your customers see**: the one shown in the portal header, on the login screen and in the email subject line. If you leave it empty, your company's registered name is shown.

Alongside you have a **live preview**, with sample data, that changes as soon as you touch anything. You can switch between **Home** (the first thing the customer sees), **Login** (the screen where they request their button to log in) and **Email** (the invitation), and view it on desktop or mobile. In the email preview you'll see a note worth keeping in mind: **emails go out with Fube's look and your logo inside, but your colour doesn't reach the emails**.

If you remember a secondary colour, a background colour or a favicon from before, they're gone: the portal never used them.

And the Fube note at the bottom. You should know what your portal carries besides your branding. At the bottom of the portal, the login screen and the documents you share by link there's a note: **'Made with Fube · Do you invoice too? Try it for free'**. And on your customer's Home page, a card with the same invitation, which they can close and which reappears after thirty days.

- **If you have the referral programme switched on**, in **Configuration → Referrals**, that link is yours: anyone who signs up through it gets a 20% discount for twelve months and you get your commission, 20% of what they pay during those twelve months. If you don't have it switched on, the link goes to Fube's website.

- **Only the Elite plan removes it.** With Elite neither the note nor the card appears.

In this tab's preview you see it exactly as it will appear, with your plan.

See the portal as a customer sees it

Before inviting a customer, or when they tell you something isn't working for them, the quickest thing is to see it through their eyes. That's what **View as this customer** is for: it opens that customer's portal in another browser tab, exactly as they see it, with their documents, their catalogue, their onboarding and their projects.

You'll find it in four places:

- In **their record, Portal tab**, in the side panel.
- In the portal's **Customers** tab, in the menu on their row.
- In the portal's **Settings** tab, with the **View as a customer** button: there you choose the customer.
- In a project shown in their portal, with **View as** and the customer's name, in the project's **Settings** and below the month in its **Reports** tab: that one takes you straight to that project.

While you're looking, at the very top you'll see a dark bar with **'Preview as' and the customer's name**, followed by 'Read-only · doesn't notify or count as a login', and the **Close preview** button. What you should know:

- **It's read-only.** You can browse all of it and download their documents, but you can't place an order —the **Add** and **Send order** buttons are disabled—, or respond to a quote, or fill in their onboarding, or sign.
- **It doesn't notify them or count as their login.** The customer doesn't find out and their last login doesn't change. It is, however, recorded on their record: the activity in the Portal tab shows that that member of your team **viewed the portal as this customer**.
- **It works even if you haven't given them access yet, and even if the portal is closed.** That way you can check what they'll see before sending them the invitation.
- **It lasts 30 minutes**, or until you click **Close preview**.

Edge cases and common errors

- **‘My customer says the invitation hasn’t arrived.’** Ask them to check their spam folder. Check on their record that the email address is spelt correctly and, if it is, use **Resend invitation**.
- **‘The button in the email says it’s no longer valid.’** It has been used or has expired: the invitation is valid for 7 days and the button requested from the portal for 15 minutes, and both can only be used once. Ask them to go to your portal’s address and request another one with their email, or resend the invitation yourself.
- **‘They opened the email but didn’t get in.’** The second click is missing: clicking the button in the email opens a page with another button, **Enter the portal**, and that is the one that lets them in.
- **‘They request the button and it doesn’t arrive.’** Ask them to check that they are typing exactly the email address you gave access to, because the screen gives the same answer whether they have access or not. And not to request it ten times in a row: Fube sends at most three buttons to the same email address every quarter of an hour, so that nobody can flood someone else’s inbox.
- **‘I need another person from the same customer to get in.’** Go to their record, Portal tab, and click **Add person**. Each person has their own access, and you can remove one person’s access without affecting the rest.
- **‘Someone has left my customer’s company.’** Remove access for that person only from the record. The rest of their company can still get in.
- **‘It won’t let me give access: it says the portal is closed.’** Someone closed it. Open it with **Open the portal**, in the notice on the **Customers** tab or in **Settings**, and try again.
- **‘When I open the portal it takes me to a plans screen.’** Your plan doesn’t include the portal. It isn’t a configuration error: it’s the plan.
- **‘My customer says the PDF link gives an error.’** It has expired: links last one minute. Ask them to go back to the portal and click **View PDF** again.
- **‘I’ve changed the address and the old one doesn’t work.’** The address is the way in: if you change it, the old one no longer leads to your portal, including the one you have on your website or in your signature, and neither do the buttons in invitations nobody had used yet: those need to be resent. That’s why the change isn’t saved automatically and you are warned first. Once you’ve shared it, avoid changing it.

- **‘My customer says they can’t see something they should.’** Open it with **View as this customer** and you’ll see it exactly as they do, without notifying them. If a section is missing, check **What your customers see** on the **Settings** tab and, if you set something specific for them, the Portal tab on their record.
- **‘I’ve switched on a project and my customer can’t see it.’** Both things are needed: the project switched on **and Projects** ticked in **What your customers see** — and in their own settings, if you chose specific modules for them on their record. If the second is missing, the project itself warns you, in its **Settings** and on its **Reports** tab, with a link to their record to enable it. And if you publish a report like that, the dialogue warns you that they won’t see it and doesn’t send them the email. Check it with **View as this customer**.
- **‘My customer says they can’t accept a quote.’** Check its status in their portal with **View as this customer**. If it shows **Expired**, its due date has passed: send them an updated one. If it is already **Accepted** or **Rejected**, someone from their company has already responded. If the buttons don’t appear and the quote has no status, you’ve already converted it. And if they can’t even see it, check that the quote is assigned to that customer and that they can see **Documents**.
- **‘My customer accepted a quote by mistake.’** It can’t be undone from the portal. Change the status of the quote yourself in Fube; if you set it to Pending, they can respond again.

Frequently asked questions

Do my customers have to register or create a password?

No. They get in with their email: the first time, with the invitation button; after that, by requesting a button from your portal’s address. There’s no password to remember and no account to create.

Is it safe for the portal address to be public?

Yes. The address only leads to the login screen. To get past it you need a button that is only sent to the email of a person with access, can be used only once and expires: the invitation button in 7 days and the one requested from the portal in 15 minutes.

How long does my customer stay logged in?

30 days from the last time they log in, in that browser. If they log in often, they don't need to request the button again; if they want to leave sooner, they have **Leave the portal**.

Can they pay invoices from the portal?

No. The customer portal is for viewing and downloading documents, completing onboarding, signing and placing orders, but it **doesn't include a payment gateway**: there's no online payment within the portal. You manage payments from Fube as before, as explained in the guide to **payment management**.

Can my customer accept a quote from the portal?

Yes. On the quote they have **Accept quote** and **Reject**, with a note if they wish. Fube records who responded, with which email, when and from which IP, changes the status of the quote and notifies your team via the bell and by email. Accepting it doesn't create the invoice: you convert it. And they don't need the portal for this: the public link you send them by email or WhatsApp also lets them accept or reject it.

Can my customer place orders with me from the portal?

Yes. Switch on the catalogue module with orders enabled, create at least one catalogue with products and your customer will be able to order from their portal. The order reaches you as a draft sales order; the guide to **catalogue and orders in the customer portal** covers it in full, and what comes next is covered in **from sales order and delivery note to invoice**.

Does Fube appear anywhere on my portal?

Yes, in a footer note, 'Made with Fube · Do you invoice too? Try it free', and in a card on the Home page that your customer can close. If you have the referral programme switched on, that link is yours. Only the Elite plan removes it. The emails your customer receives, on the other hand, carry your name and logo, and arrive as 'Your company via Fube'.

Can I use my own domain for the portal?

No. The portal is served under Fube's address, with the final part you choose during setup.

Is it included in the free plan?

No, nor in all paid plans: the customer portal comes with the most complete plans. You can see which ones include it on **pricing**.

Can one customer see another customer's invoices?

No. Each person logs in as a specific customer and sees only that customer's documents and information. The portal doesn't mix data between customers, not even when the same email has access to two: they log in to one or the other, never both at once.

Do I have to enable all the modules?

No. You choose what to switch on: just documents, just the catalogue, just onboarding with contracts, just projects, or whatever combination suits you. Home is always available; you enable the rest according to what you need and change it whenever you like.

Can I tell whether a customer has ever logged in?

Yes. The first time each person logs in, a notification arrives in the bell, and on the portal's **Customers** tab you can see each customer's status and last access. On their record, Portal tab, you also have the details person by person.

Can I see the portal as a customer sees it?

Yes, with **View as this customer**, from their record or from their row on the **Customers** tab, or with **View as a customer** on the **Settings** tab. It opens in another tab, for viewing only: it doesn't notify them, doesn't count as their access and lasts 30 minutes.

Can I ask a customer to sign a contract?

Yes, in two ways: as a step in their onboarding, or by sending it for signature whenever you like from their record, with **Send for signature**. They receive an email with a button that takes them straight into the document, and each signature is stored with its evidence and a PDF. It's covered in the guide to **customer onboarding and signatures in the portal**.

Can my customer see how the project I’m doing for them is going?

Yes, if you manage the project in Fube and your plan includes Projects. You switch it on in the project settings and, from that moment, they can see it in their portal: how it’s going, the hours each month, what’s finished and what’s open, and the monthly reports you publish for them. They never see who did each thing, nor task comments, nor your rates, and they can’t comment on or approve anything from there: it’s for viewing and downloading only. It’s covered in the guide to **tracking a project’s progress and hours**.

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