Fube

GUIDE

How to export your invoices, expenses and catalogue to Excel or ZIP in Fube



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Updated · 8 November 2026

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> The end of the quarter arrives, along with the usual email from your accountant: ‘send me the invoices and expenses for the period’. Or you decide to switch software and need to take your information with you without copying anything by hand. This guide is for anyone who runs a company or works for themselves and wants to get their data **out** of Fube in an orderly way: in a spreadsheet or in a package with the documents.

Before you start, it helps to be clear about two things. First: in Fube, **what goes in can come out**. The invoices, expenses, customers and products you record can be taken out again whenever you need them. Second, and importantly: an export is **a copy of your data to work with or hand over**; it is not a filing with the tax authorities and it does not replace your record-keeping obligations. Fube **organises and exports** your information for you; submitting forms or official ledgers to the AEAT remains a separate step that you decide on with your accountant.

To follow this guide, all you need is to have the documents or records you want to take with you recorded in Fube. Nothing else.

What you can export and in which format

Fube exports three kinds of things, and each one has its own format:

- **The table as you see it → Excel, PDF or CSV.** Every list in Fube, not just the ones in this guide, has the **‘Export table…’** option under **Actions**: you take the rows and columns you choose, with whatever filters you have applied, in **Excel**, as a landscape **PDF** to print or send, or as **CSV** for another program.
- **The export of each record → spreadsheet.** Your invoices, expenses, customers and products come out with the fields Fube has prepared for each one, ready to open in Excel or a Google Sheet, or for your accountant to process. Almost every list exports to **Excel (XLSX)** without asking; **customers, products and suppliers** let you choose between `xlsx (Excel)` and `csv`.

- **Complete documents → ZIP.** Instead of downloading invoices one by one, Fube bundles the PDFs into a single compressed file. The same goes for your expense receipts.

The documents you can export include invoices, simplified invoices, corrective invoices, quotes, pro forma invoices and delivery notes, as well as your expenses, your customers and your product catalogue. Full details are on the data exports page.

Use Excel for your tables and the ZIP to take documents in bulk. If an accountant or a new program asks you for a specific format, check with them first: that handover is precisely what the Excel export is for.

Step 1 · Open the list of what you want to export

The starting point is the list itself; there is no central screen from which to export everything. If you want to take invoices, go to the invoice list (**Sales › Invoices**); for expenses, to the expense list; for customers, to **Sales › Customers**; for the catalogue, to **Inventory › Products**. Each of these lists is where its export is launched from.

It is worth making sure you are on the right list before filtering, because the export takes the records you select in that list.

Step 2 · Filter and select the records you are taking

This is where you decide the scope. Fube lets you filter the list by date, status or customer and select exactly the records you want to export: the whole quarter, a specific customer, the month you have just closed. The export includes **that** selection, no more and no less, so you don't drag along the rest of your history when you only need one period.

If you want a complete copy of one type of data, simply don't filter and select everything.

Step 3 · Launch the export you need

With the records selected, open the selection's **actions menu** (the one that appears above the table when you have selected rows). It offers you three routes depending on what you are taking, and you choose one:

- **‘Export table…’** to take what you see. It opens a panel with three choices: the **format** (Excel, PDF or CSV), the **rows** — the selected ones, all those matching the filter or those on this page — and the **columns**, which come pre-selected as you have them on screen. This option is also available without selecting anything: the **Actions** button always offers it.
- **Export** for the data of each record. In the invoice list, this is the **‘Export invoices’** action; the same applies to expenses, customers and products.
- **Download (PDF / ZIP)** when you want the complete documents. The **‘Download invoices (PDF)’** action gives you a PDF if you have selected just one and a **ZIP with the PDFs** if you have selected several.

When you click ‘Export’, a confirmation window opens telling you how many records you are about to take. In most lists you simply confirm there, because the format is Excel (XLSX) and there is nothing to decide. For customers, the **product catalogue** and suppliers, that window also includes a **format drop-down** with two options, `xlsx (Excel)` and `csv`: choose one and click **Download**. Nothing comes out ‘directly’; you always go through that confirmation.

Step 4 · Collect your file

What happens depends on what you requested:

- **The table in Excel**, and also anything you take out with ‘Export table…’ in any of its three formats, downloads directly: as soon as it is ready, the file lands on your computer, without going through the Exports page.
- **The document package (ZIP)** doesn't lock the screen: it is prepared **in the background** as a job, and you can keep working in the meantime. Each of these packages is recorded on the **Exports** page, with its status and progress.

That **Exports** page is your ZIP inbox: there you can see the history of the packages you have exported, download the file once it shows as completed, regenerate one you requested before and keep everything in one place.

And it's worth knowing where it is, because it's hard to find. It lives under **Utilities › Exports**. You can reach it by opening **Utilities** in the side menu, but **it doesn't appear in the header tabs or in the app's search**: if you look for it by typing ‘exports’, it won't come up. Save it as a favourite if you use it often.

Edge cases and common errors

- **The file is no longer available.** Because the export is prepared as an asynchronous job, the package doesn't last forever. Once the file has gone, the inbox row **no longer offers you 'Download'** — the button isn't there, it's not that it fails — and instead shows you **the reason** and a single action: **'Regenerate'**. Be careful, because this isn't a new link to the same file: it **redoes the whole job**, so it takes as long as it did the first time. If what you need is a table you had already downloaded, launch it again from its list.
- **An export has failed.** It is marked with its status in the inbox, and there the action is called **'Retry'** (as opposed to 'Regenerate' in the previous case: something failing is not the same as the file having expired). If it fails again with a very large volume, try narrowing the selection with filters and exporting in parts.
- **You want to download several at once.** By selecting rows in the exports table, Fube lets you bulk download the ones that **actually have a file** — expired ones are left out of that download — and delete those you no longer need.
- **You need the income or expense ledger for your tax return.** That isn't just any export: those are the tax record books, which have their own section. Exporting invoices to Excel gives you your data to work with, but the official record book is generated separately. If your goal is the tax return, start there and check with your accountant.

Frequently asked questions

Which formats can I export to?

It depends on how you export. With **Actions › Export table…**, any list can be exported to **Excel, PDF or CSV**, with the rows and columns you choose. Each list's own export produces **Excel (XLSX)** for invoices, simplified invoices, quotes, delivery notes and expenses, and for **customers, products and suppliers** it lets you choose between `xlsx (Excel)` and `csv`. And to take your complete documents with you, there is a **ZIP** that bundles the PDFs of your invoices or the receipts for your expenses.

Where is the Exports page?

In **Utilities › Exports**, in the side menu. Don't look for it in the header tabs or by typing in the app's search bar: that screen isn't indexed there.

Can I export just one quarter or one customer?

Yes. You filter the list and select the records you want; the export includes exactly that selection. That way you get the period, customer or set you're interested in without dragging along the rest of your history.

Is an export valid for tax purposes on its own?

Not on its own. An export is a copy of your data for working with or handing over; it doesn't replace your record-keeping obligations or the filing of tax forms with the authorities. The valid tax document is the issued and registered invoice, not the exported file. For your obligations, rely on the **record books** and your accountant.

Does this have anything to do with submission to the AEAT?

No. They are different things. When you issue an invoice, Fube sends it to the AEAT as standard as part of **Verifactu**; that happens at the moment of issue, not when you export. Exporting is simply taking a copy of your data for yourself or for your accountant.

Your data always within reach

Getting your information out of Fube is as easy as putting it in: Excel for your tables, ZIP for your documents and a tray where everything you export is logged. If you're also coming from another tool, the way in is covered in the **import and export options**, and adding your contacts is explained step by step in the guide to **creating a customer in Fube**.

Don't have an account yet? The **Fube free plan** is free forever and lets you see from day one that your information is never locked in.

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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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