Fube

GUIDE

From sales order and delivery note to invoice in Fube



fube.es

Updated · 15 November 2026

> If you sell products, you deal with three documents that look alike but are not the same: the **sales order**, the **delivery note** and the **invoice**. Mixing them up leads to typical mistakes — charging against a delivery note, thinking a sales order is already an invoice — which, with Verifactu, cost you a corrective invoice. This guide explains, without jargon, what each one is, what validity it has and **how they actually reach the invoice in Fube** (it is not a straight line: there are two routes, and each one has its catch).

Before you start

Three ideas that put everything in order:

- **Only the invoice has tax validity.** The sales order and the delivery note are working documents: they organise the sale and the delivery, but **they neither charge nor declare anything**. The one that counts for the Tax Agency — and for Verifactu — is the invoice.
- **The sales order does not become a delivery note.** In Fube it is invoiced **directly**. The delivery note is an **independent** document you use when you need to prove deliveries; it is not a mandatory intermediate step between the sales order and the invoice. The only exception is sales orders from your online shop, which can come with their delivery note already made if you enable it in the integration (you'll see this in step 2).
- **There are two ways to reach the invoice, and they don't behave the same.** From a **sales order** the invoice is **issued on the spot**; by grouping **delivery notes** you get a **draft** that you review before issuing. Choose knowing that.

Step 1 — The sales order: what you agree

The **sales order** records what your customer has asked you for: customer, lines, quantities, prices and discounts. It is internal and has no tax effect; it helps you keep the job organised and track its status. You'll find it in **Inventory > Sales orders**.

A sales order goes through statuses, and the status decides what you can do with it:

Status	What you can do
Draft	Edit it and **delete it**. It cannot be invoiced yet

Status	What you can do
Confirmed, **Processing**, **Completed**, **Delivered**	**Invoice**. These are the four statuses from which Fube issues the invoice
Cancelled, **Refunded**, **Failed**	Neither invoice nor delete: they remain as history

Two rules worth knowing before they catch you out. **Only draft sales orders can be deleted**: in any other status, Fube replies 'Only draft sales orders can be deleted' and the way out is to cancel it, not delete it. And **a sales order that already has an invoice cannot go back to draft** nor accept substantive changes — only status changes — because returning it to draft would open the door to deleting it and leaving its invoice without an origin.

If you sell online, your shop's orders also come in as sales orders through the **ecommerce integrations**, but **they don't appear the instant the customer buys**: Fube syncs every **five minutes**, so allow for that margin before going to look for a freshly placed order.

Step 2 — The delivery note: what you deliver

The **delivery note** proves what you have delivered and when. It is the proof that the goods left and arrived, but **it has no tax validity**: it is not an invoice, nor does it replace one. It lives in **Inventory > Delivery notes**, with its own series — Fube creates a default one with the prefix AL and the year in front of the number, along the lines of `AL260001`.

The delivery note you create yourself starts as a **draft**, like an invoice: you can edit it and, if you've made a mistake, **delete it**. It gets its number when you **issue** it, with the **Issue** button on its record; from then on it can no longer be deleted — if it's not needed, it is **voided** — and that is when it can be sent to the customer and invoiced.

The one your online shop creates, on the other hand, starts out issued. If you have your shop **connected to Fube** and in its integration you switch on **Enable delivery notes** and choose the **Statuses that issue the delivery note**, Fube creates the delivery note for each shop order that reaches one of those statuses, on the next sync. And it creates it **already issued**, without going through draft: with the customer, the lines and the date of the sales order, and with its number from the **Delivery note series** you choose in the integration or, if you don't choose one, from the default series in **Delivery notes > Preferences**. Like any issued delivery note, it can no longer be deleted — it is voided — and it can be sent. But the sales order and its delivery note are the same sale: Fube won't let you invoice the sales order if its delivery note has already been invoiced, and if you go to invoice the delivery note of a sales order that has already been invoiced, it warns you. You'll find this further down, in the edge cases. Each sales order receives **only one** delivery note, even if the sync goes over it again.

Its usefulness lies in the day-to-day work of anyone who delivers in several instalments: you record each delivery as a delivery note and, when the customer receives it, it is marked as **accepted** to record their approval. You mark it yourself, or the customer accepts it from the delivery note link, as explained just below. That is precisely why the list splits delivery notes into four tabs — All, Accepted, Pending and Not invoiced — which is how you see at a glance which deliveries you still need to close. You'll find the details in **delivery notes**.

Letting the customer accept the delivery from their link

Your customer doesn't need a portal or to send you back the signed delivery note: they can accept the delivery themselves, from the delivery note's **link**.

1. With the delivery note **issued**, generate its link: **Generate link** in its menu, or **Create link** in the **Links** tab of its record. Fube suggests an expiry of 90 days. A draft cannot be shared. Send them the link however you prefer.
2. Whoever opens it sees the delivery note and, above it, the **Have you received the delivery?** banner with the **Accept delivery** button.
3. When they click it, they are asked for **Your name** and **DNI or NIE**, both required, and an optional note: ‘Is anything missing or would you like to add something?’. Before accepting, they are told what gets recorded: the date and time, the address it is accepted from, their name, their DNI and whatever they write.
4. Click **Accept**, and the banner changes to ‘Delivery accepted on … by …’.

In Fube, the delivery note changes to **Accepted** at that moment. On its record, the **Delivery** side panel shows **Accepted** with the date, **By** with the name and DNI, **From** —'The link · IP …'— and the **Note**, if they left one. And it notifies you: in the bell, with '… has accepted delivery note …', with the name of the customer and the number, which opens that delivery note when you click it, and by email with the same subject. It reaches the people in your team who can see delivery notes. The email is sent with your company's notification emails: if you have them turned off, only the bell notification arrives.

What you should know:

- **It can only be accepted once.** Once accepted —from the link or manually by you—, the link no longer offers the button: it shows 'Delivery accepted on …' and 'To change anything, write to whoever sent you the delivery note.'. If two people try at the same time, only the first one counts.
- **Only an issued delivery note.** A draft has no link, and a cancelled one no longer offers acceptance.
- **Accepting does not use up any of the link's uses.** But if the link has expired or has reached its usage limit, it no longer opens: generate another one.
- **If you remove the acceptance** when editing the delivery note, with the **Delivery note accepted** switch, the acceptance note and IP are also deleted, and the link offers **Accept delivery** again.

  Where the conversion is. On the record of an issued, uninvoiced delivery note you have the **Invoice** button; the other destinations are in the **Convert to…** submenu, inside **More**. In the list, the same submenu hangs off the actions menu (⋮) of its row, with three destinations: **quote**, **pro forma invoice** and **invoice**. Each one creates the document instantly and opens it for editing.

  Where it is configured. The delivery note series and template are set in **Delivery notes > Series** and **Delivery notes > Preferences**, within the module itself. There is no global 'Series and numbering' or 'Preferences > Delivery notes' section in Settings: each document type has its own.

Step 3 — The invoice: what you charge

The **invoice** is the legal document that charges for what was agreed and delivered, and the only one that goes through Verifactu. You can get to it by two routes that behave differently:

From a sales order: it is issued on the spot. With the sales order in one of the four statuses that allow it, you click **Generate invoice**, confirm and that's it: Fube inherits the customer, the lines, the discounts and the taxes, works out the series and **issues the invoice right there**, with its Verifactu record included. There is no draft to review and no intermediate step: from that click onwards the invoice is a tax document and can only be corrected with a corrective invoice. The dialogue itself warns you —'You are about to issue an invoice'—, and it is worth reading. If you need to review first, review the sales order.

From one or more delivery notes: you get a draft. If you have been delivering in parts, you select that customer's delivery notes and group them into an invoice that you **can** review before issuing: Fube creates it as a draft and opens it for editing. We cover this in the next step.

Standard or simplified: the actual rule

When invoicing a sales order, Fube does not ask you for the type. It decides using two conditions **at once**:

The customer	The total	What Fube issues
No billing NIF	Up to €400	**Simplified invoice** (the 'receipt')
With NIF	Any amount	**Standard invoice**
No NIF	**Over €400**	**Nothing: the operation fails**

That third case is the one that catches people out. Above €400 a simplified invoice **is not valid** (RD 1619/2012), and without a NIF a standard one cannot be issued either, so Fube does not invent an invalid document: it stops and tells you, with the sales order number and the amount, asking you to add the customer's NIF. It is not a bug: it is the only correct outcome. Add the NIF to the customer's record and invoice again.

If you have never issued an invoice in Fube, the guide to **creating your first invoice** takes you through the whole process.

Step 4 — Group several delivery notes into one invoice

This is the classic case of the supplier who delivers several times a month and invoices just once at the end. In Fube:

1. You record each delivery as a delivery note, and it is marked as **accepted** when the customer receives it: you mark it yourself or they accept it from their link.
2. You filter the delivery notes **by customer** and select the ones you want to invoice.
3. In the selection menu, you choose **Group into invoice**: Fube immediately creates a draft invoice with the lines and discounts of all the selected delivery notes, and with a description that starts with their numbers —'Delivery notes: 0002, 0007'— followed by the description of each one, if it has one. And it opens it for editing.
4. From that moment the delivery notes are **linked to the invoice** and no longer appear in the **Not invoiced** tab. Go over the draft and adjust whatever is needed.
5. You issue the invoice when it is ready.

That way your customer receives **one invoice** reflecting all the deliveries in the period, without you having to copy lines by hand.

All the delivery notes must belong to the same customer. An invoice belongs to a single recipient, so if you mix customers in the selection Fube creates nothing and tells you: 'They belong to different customers: an invoice is for a single customer'. That is why the step of filtering by customer is not a tidiness recommendation, it is the step that makes it work.

What counts as invoiced, and what Fube does not stop you doing. A delivery note leaves **Not invoiced** as soon as the invoice grouping it exists, even if it is still a draft; if you delete that draft, it returns to the tab. And the delivery note issued by your shop counts as invoiced as soon as its sales order has an invoice. If you pick a delivery note from the **All** tab that already has an invoice, when you group it —or convert it with **Invoice** or **Convert to... > Convert to invoice**— Fube does not create anything yet: it first opens the invoice form, with everything filled in and a warning about which ones are already invoiced. If you carry on and save it, it is created: invoicing it again is your decision. And if the draft were missing any details that Fube cannot fill in by itself, the same happens: the form opens for you to complete it. And one thing from before: the delivery notes you grouped before this improvement were not linked, so they still appear as pending and without a warning; check those manually before grouping them again.

Which one to use

When you are unsure which document to issue, the useful question is what you need it to do:

Document	When you use it	Tax validity?	Where it is
Standard invoice	Regular sale to someone with complete details	Yes	Sales > Invoices
Simplified invoice	Amounts up to €400 or retail trade	Yes	Sales > Simplified invoices
Corrective invoice	Correct, cancel or refund an invoice already issued	Yes	From the invoice itself, under Corrections
Recurring invoice	Fees or services that repeat on the same basis	Yes, as each one is issued	Sales > Invoices > Recurring
Pro forma invoice	Confirm price and terms before selling; customs procedures	No	Sales > Pro forma invoices
Quote	Make an offer before doing the work	No	Sales > Quotes
Delivery note	Prove a delivery, to invoice later	No	Inventory > Delivery notes
Sales order	Record the customer's order, whether you enter it yourself or it	No	Inventory > Sales orders

Document	When you use it	Tax validity?	Where it is
	comes from your online shop		

The last four neither charge nor are declared: they are preliminary steps. The first four do, and once issued they cannot be edited or deleted —only corrected—.

Edge cases and common mistakes

- **You take payment against a delivery note.** A delivery note neither collects payment nor gets declared: if you need to get paid, issue the invoice (from the sales order or by grouping delivery notes). The delivery note only proves delivery.
- **You invoice the sales order thinking you'll review it later.** There is no later: it is issued as soon as you confirm the dialogue. If something is wrong with the sales order, fix it **before** you click **Generate invoice**.
- **You group the same delivery notes twice.** Fube warns you before creating the invoice, but it doesn't stop you, and the ones you grouped before delivery notes were linked to their invoice don't even trigger a warning. Invoice in clean cut-offs and don't go back over a period you've already closed.
- **The customer has no NIF and the sales order is over €400.** Invoicing fails on purpose. Add the NIF to the customer's record and try again; there is no valid way to issue that document without it.
- **You want one invoice per sales order and then another one.** A sales order generates **one** invoice (full or simplified). If you need to split the payment across several invoices, work with delivery notes and group them however you like.
- **You make a mistake on an invoice that has already been issued.** With Verifactu it can't be edited or deleted: it is corrected with a **corrective invoice**. The source sales order or delivery note doesn't change; from the invoiced sales order, the available action becomes **Generate corrective invoice (refund)**.
- **You expect the sales order to create the delivery note by itself.** With a sales order you enter yourself, that doesn't happen: they are separate documents, the sales order goes straight to an invoice and you create the delivery note when you need it. Only sales orders from your online shop can come with their delivery note already made, and only if the integration has **Enable delivery notes** switched on: in that case it comes out already issued, not as a draft.

- **The shop issues the delivery note and the sales order is also invoiced.** They are the same sale, and Fube knows it from both sides. If the sales order is invoiced — whether by the shop or by you — its delivery note counts as invoiced: it leaves **Not invoiced**, and if you pick it from **All** to group it or **Invoice** it, Fube warns you that it already has an invoice, just as with any invoiced delivery note. The other way round is stricter: if the delivery note is already invoiced — grouped or converted into an invoice — the sales order **is not invoiced**. **Generate invoice** tells you which delivery note has it and won't let you issue it; **Generate invoices in bulk** skips that sales order and tells you which one; and the shop, with **Invoice sync** switched on, doesn't invoice it either: it skips it and logs it as an invoicing failure on the integration's card. This happens above all when the delivery note is issued at an earlier status than the invoice — for example, the delivery note at 'Shipped' and the invoice at 'Delivered': the delivery note waits in **Not invoiced**, you group it at the end of the month and, when the shop order reaches 'Delivered', the shop no longer invoices it. A cancelled invoice doesn't count on either side: if you cancel the delivery note's invoice, the sales order can be invoiced again, and if you cancel the sales order's, its delivery note goes back to **Not invoiced**. Even so, choose a single route to avoid surprises: with automatic invoicing switched on, let the shop's delivery notes only prove delivery; if you prefer to invoice by grouping delivery notes, don't invoice their sales orders.
- **You're looking for a shop order that has just come in.** Give it five minutes: syncing is periodic, not instant.

Frequently asked questions

Does the delivery note work as an invoice? No. The delivery note proves delivery but has no tax validity. To get paid and declare you need the invoice.

Can I invoice several deliveries together? Yes. You record each delivery as a delivery note and, at closing, you select that customer's delivery notes and group them into a single invoice. Those delivery notes are linked to the invoice and no longer appear in **Not invoiced**. If you later select one of them from **All** to invoice it again, Fube warns you first, but doesn't stop you.

Can my customer accept the delivery note themselves? Yes, from the delivery note's link: with **Accept delivery** they enter their name and their DNI, and a note if they wish. The delivery note changes to Accepted with those details, the date and the IP, and you get notified. It can be accepted once and only when the delivery note has been issued.

Does the sales order first become a delivery note and then an invoice? No. It is invoiced directly. The delivery note is a separate document you use when you need to keep a record of deliveries. If your online shop issues delivery notes, the sales order also has its own, but the invoice is still generated from the sales order, not from the delivery note.

Full or simplified invoice? Fube issues a simplified invoice only when **both** conditions are met: the customer has no billing NIF **and** the total doesn't exceed €400. With a NIF, a full invoice. And without a NIF above €400, neither one: the operation stops and asks you for the NIF.

Can I invoice several sales orders at once? Yes. Select the sales orders in the list and use **Generate invoices in bulk**. Fube skips those that already have an invoice and those whose delivery note is already invoiced — it tells you which ones these are — and it tells you how many it has generated — or how many have failed, which is usually down to the NIF and the €400 rule. Remember that here too the invoices are **issued**, not left as drafts.

What about quotes and pro forma invoices? They also lead to the invoice: when the customer accepts a quote or a pro forma invoice, you can convert it into an invoice. They are preliminary offers, with no tax effect until you invoice. The step-by-step is in **convert a quote into an invoice**.

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