Fube

GUIDE

How to get started with the Fube AI Agent step by step



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> The tiring part of running a business is rarely deciding what to do: it's the path to getting it done. Opening the list, filtering, copying the amount, drafting the document, going back because you were missing a piece of information. The **Fube AI Agent** exists to shorten that path: you talk to it as you would to someone on your team—'how much have I invoiced this month?', 'draft an invoice for Acme SL'—and it goes and finds the information in your account, prepares the result and leaves it ready for you.

The rule that never changes: **before issuing an invoice, sending a document or a payment reminder by email, deleting data or opening a support ticket—anything that can't be undone—it asks you for confirmation**. Anything reversible, such as a draft or a task, it does straight away and shows you once it's done so you can review it. The AI assists; you decide.

This guide is for getting started on day one, without learning commands or changing the way you work.

Before you start

You don't need to install anything or activate an integration.

- **A Fube account you're signed in to.** The agent lives inside the app and works with your real data, so it only works when you've signed in to your account.
- **It's included in every plan**, the free one included. What changes from one plan to another isn't having it, but **how much you can use it each month**: each plan comes with a monthly allowance that is used up as you chat and which, if it runs out, locks the message box until it renews. This is explained in the **AI Agent budget** guide, and the comparison by plan in **pricing**.
- **An idea of what you want to ask it.** It doesn't have to be a perfect sentence. 'Invoice this', 'who owes me money?' or 'summarise my expenses for the month' will do.

A note to avoid confusion: the agent and **AI expense scanning** are two different things with two different counters. Scanning reads receipts and supplier invoices and uses one credit per document; chatting with the agent doesn't deduct those credits. If what you're after is digitising received invoices, that's explained in **recording and digitising expenses**.

Step 1 — Open the chat from any screen

The agent is always to hand, and it opens without leaving the section you're working in. You have three ways to do it:

- Its **button**, in the top bar, to the right of the search box. On your phone it's in the header, next to the clock.
- **Ctrl J** (**⌘ J** on Mac), which opens and closes it from any screen, even while you're typing in a field.
- The **search** (Ctrl K or ⌘ K), where you'll find the **Open the assistant** option.

When no conversation has been started, it welcomes you with a **greeting based on the time of day and your name** —'Good afternoon, Laura'—, the question 'How can I help you today?' and the **text box in the centre**. There are no suggestions to click: you type what you need, in your own words. If you want to go faster, the box itself reminds you that / opens shortcuts and @ lets you mention a record (step 3).

And something handy: if you open it by mistake and close it without typing anything, **nothing is left in your history**. The conversation only comes into existence with the first message.

Step 2 — Ask for what you need in natural language

Type in the chat box as you would speak to someone on your team. There's no special syntax to memorise and no forms to fill in.

The agent interprets your intent and decides which **specialist area** to turn to. There are fourteen —invoicing, customers and CRM, expenses, product catalogue, staff, treasury, projects, statistics, settings, master data, organisation, support, knowledge base and its own memory—and you don't have to choose any of them: it does that itself.

Here are real examples by area, for day one. Swap them for your own customers and amounts:

Invoicing

- 'Create an invoice for Telefónica SA with the description Consultancy service for €1,500 plus IVA.'

- ‘Find all invoices that have been pending payment for more than 30 days.’
- ‘Issue this morning's draft invoice for Acme SL.’ (It gets its number when it's issued.)
- ‘How much have I invoiced to my top 5 customers this quarter?’
- ‘Create a corrective invoice for F260031: the correct amount was €950, not €1,200.’
- ‘Invoice quote P260012 for Acme SL.’ (The invoice is linked to the quote and stays in draft until you issue it.)
- ‘Email F260031 to Acme SL.’ and ‘Give me the PDF of F260031.’

Expenses

- ‘Record an expense of €350 for office supplies dated today.’
- ‘What are my highest expenses this month?’
- ‘Show me all expenses from Correos this year with their running total.’

Treasury and payments

- ‘What's the balance of my main account?’
- ‘Show me this month's unreconciled transactions.’
- ‘Has invoice F260038 been paid? How much is still outstanding?’
- ‘Show me invoices more than 15 days overdue, by customer.’
- ‘Send a payment reminder for F260038.’ (If payment management is included in your plan.)

Analysis

- ‘Financial summary for the first quarter of 2026.’
- ‘Compare this month's sales with last month's.’
- ‘What's my DSO, my average collection days, for this year?’
- ‘What are my 10 best-selling products this year?’
- ‘Export all January invoices to Excel with customer, base, IVA and total.’

About that last one: when you ask it for an Excel file—or when the answer is a long table—the agent generates the file and **leaves it for you right in the conversation**, without going through any export screen.

And a word on DSO, because the figure is misleading if you don't know what it measures: Fube doesn't apply the textbook formula based on the customer balance. It calculates the **average number of days between issuing and getting paid**, counting only invoices that have already been paid. Those still outstanding are not included in that average: they are reported separately, with their number and amount. It is a more honest figure for how long it takes people to pay you, but it is not comparable with a DSO calculated the classic way.

Step 3 — Use shortcuts and mentions if you want to go faster (optional)

They are a convenience, never a requirement: everything they do can be requested by simply asking.

Shortcuts with `/`. Typing `/` opens a menu with fifteen frequent actions —Invoice, Expense, Customer, Product, Supplier, Quote, Statistics, Pending payments, Treasury, Clock-in, Holidays, Settings, Export, Memory and Help—. Choose one and the command **writes the opening sentence for you**; the agent will then ask you for any missing details. It does not accept parameters typed after it.

A practical detail: the menu filters by the command's **name**, not by a hyphenated identifier. Type `/cobros` and you will find 'Pending payments'; `/cobros-pendientes`, as is, doesn't match anything.

Mentions with `@`. Typing `@` opens a picker so you can refer precisely to one of your **customers, invoices, products, employees, suppliers or projects**. It is the way to avoid ambiguity when you have two customers with similar names.

You can narrow down the type with the prefix —`@cliente:Acme`, `@factura:2026`— with one catch you won't see coming: **the search stops at the first space**. `@proyecto:Web corporativa` only searches for 'Web'. For names with several words, type `@` and the first few letters, and choose from the picker.

Step 4 — Drag whatever you want it to look at into the chat

From Fube's lists you can **drag an item into the chat** and ask about it without describing it. It appears as a **context chip** with a preview, so you can see exactly what the agent is looking at.

It works with ten types: invoices, simplified invoices, quotes, delivery notes, expenses, products, customers, suppliers, employees and projects.

- Drag an **invoice** and ask: 'Summarise this invoice' or 'Has it been paid?'.
- Drag a **customer** and ask: 'How much do they owe me?' or 'Create an invoice for them'.
- Drag a **product** and ask: 'How many units have I sold this year?'.

Pro forma invoices are the exception: their list does not support dragging, although the chat does accept them as context. To bring one into the chat, open its row menu —the three-dot button, or a right-click on the row— and click **'Ask the agent'**: the pro forma invoice is added as a context chip just as if you had dragged it, and the panel opens by itself. That menu is also available in the other lists, in case you find it more convenient than dragging.

You can drag several items, one after another: they build up in the context, so you can drop three invoices and ask it to 'summarise them' or 'export them to Excel'. What does **not** work is selecting several rows with the checkboxes and dragging them together: dragging takes **the item you grab**, not the selection. They go one at a time.

Dragging is a desktop feature. On mobile, use @ mentions, which do the same thing.

You can also drop files on it. Drag a photo or a PDF of a receipt or a supplier invoice and the agent reads the document —amount, date, supplier, IVA, description— and records the expense with the original attached. The limits: **at most two files per message and 10 MB each**, in JPG, PNG, PDF, TXT or CSV.

Check the expense after it creates it. Recording an expense is not an irreversible operation, so the agent doesn't always stop to ask your permission: it creates it and shows it to you. A misread amount or IVA can still be corrected from the expense record.

Step 5 — Choose the mode to suit the task

The agent has **three modes**, which you switch from the **+** button in the message box, under **Mode**, where you can also see which one is selected. It doesn't change what it can do: it changes how hard it thinks and how much it uses.

Mode	What for	Usage
General	Day-to-day work: queries, a draft, a summary, a search	Low — this is the default mode
Reasoning	The middle step: moderately difficult tasks that need a bit of thinking	Medium
Pro	Complex tasks: profitability analysis, tax planning, audits	High

You can switch mid-conversation without losing the context. For most everyday requests, General is more than enough; the one almost everyone skips is Reasoning, which handles the ‘slightly tricky’ stuff without resorting to the high-cost one.

Step 6 — Have several conversations at once

This is useful when you launch a slow analysis and want to keep working while it is processed.

Inside the panel, the **sidebar** lists your conversations, with a search box for any you lose track of and a **+** button to open a new one. You switch between them with a click. In each entry's menu you can **rename** or **delete** it.

Two things worth knowing, because they aren't visible:

- **Whatever was being generated keeps generating.** The response is produced on the server, not in your tab: you can switch conversation, reload the page or close the browser, and when you come back it carries on from where it left off. There is no need to retry anything.
- **What each chat keeps is its history, not what you were typing.** Half-written text in the box and any context chips you had dragged in belong to the panel, not to the conversation: when you jump to another chat, they don't come with you. If you had half a sentence written, send it or copy it before switching.

Having chats open doesn't use anything. Having them **generating responses at the same time** does: each one uses budget in parallel, and the new chat button itself reminds you of this when you hover over it.

Step 7 — Review what it prepares and confirm anything irreversible

This is the step you shouldn't skip, because it is where you stay in control. And it is worth understanding exactly where the line is, because it isn't where many people think.

It asks for explicit confirmation before issuing an invoice, issuing a receipt or simplified invoice, sending a document or a payment reminder by email, deleting anything and opening a support ticket. When sending, it tells you which document is going out, to which address and with which copies; if you don't give it an address, it uses the customer's billing email, and if the customer doesn't have one, it asks you for it. For a reminder, it tells you the invoice, the customer and their email, the amount still outstanding and the tone. If you ask it for a bulk deletion, there is **just one** confirmation, with the number of records and the total amount, before it starts.

It doesn't ask for anything reversible: creating a draft invoice, a quote, a pro forma invoice, a task or an expense. It does that directly and shows it to you already done. This is deliberate —waiting for approval for every draft would turn the chat into a form— but it means that **you review it afterwards, not beforehand**.

Read it just as you would review a draft prepared by someone else: check the customer, the amounts, the IVA rate, the date. If something doesn't add up, ask it to correct it (‘change the IVA to 10%’, ‘date it last week’) and it will prepare it again. Anything already issued, on the other hand, isn't edited: it is corrected with a corrective invoice.

What the agent doesn't do

Knowing this in advance saves you the time spent wrestling with it. It isn't that it lacks permission: the tool simply doesn't exist, and when you ask it, it redirects you to the section of Fube where it can be done.

- **It sends no email other than a document or a payment reminder.** It sends an invoice, a receipt, a corrective invoice, a quote, a pro forma invoice or a delivery note with its PDF, like the ‘Send’ button, and the payment reminder for an invoice if your plan includes payment management; but it doesn't send newsletters or messages it has written itself.
- **It doesn't generate AEAT forms** (303, 390, 111, 347, 130, 349) as documents.
- **It doesn't handle SEPA remittances, mandates or direct debits**, or any real banking operation. It can record a payment and match a bank transaction to an invoice.
- **It doesn't import or export in bulk**, or connect your bank.
- **It doesn't change your Fube plan.** It can recommend upgrading and take you to the plans screen, but you make the change yourself.
- **It doesn't fill in forms for you.** It is conversational: it prepares results in the chat, it doesn't type into the application's screens.
- **It doesn't replace your adviser.** It summarises regulations and guides you within Fube, but tax decisions should be checked with a professional.

A special case: **advanced statistics**—by customer, by category, by supplier, comparisons—depend on a premium module. If your plan doesn't include it, the agent will tell you so instead of making up the figure.

Edge cases and things worth knowing

- **It respects your role's permissions.** The agent only accesses what your user can see, and never another company's data. If your role can't reach a section, neither can the agent.
- **Your conversations are private.** Each user sees only their own chats.
- **The budget, however, is shared.** The agent's monthly allowance belongs to the company and is shared by all users: if it runs out, it runs out for everyone.
- **It remembers things between conversations.** And it doesn't flag everything it saves in the chat. It's worth checking once **what the agent remembers and how to delete it**.
- **It understands other languages, but replies in Spanish.** You can write to it in English; the reply comes in Spanish so as to stay consistent with the rest of the application.

- **If a request is ambiguous, it asks before acting.** ‘July's payments’ could mean collected invoices, paid expenses or bank transactions: it will check with you instead of choosing on its own.

Frequently asked questions

Do I have to learn commands to use it?

No. The agent understands natural language; you talk to it as you would to someone on your team. Shortcuts with / and mentions with @ are optional, to go faster when you want them.

Does the agent change my data without warning?

It depends on whether the change can be undone. Issuing an invoice, sending a document or a payment reminder by email, deleting something or opening a support ticket **never** happens without your confirmation. Creating a draft, a quote, a task or an expense it does directly, because they are reversible: you'll see it in the reply and can correct or delete it. None of that commits numbering or goes to the AEAT until you issue.

Does the agent help me comply with Verifactu?

It doesn't depend on it. In Fube, **issuing an invoice and registering it with the AEAT are the same operation**: there is no ‘non-Verifactu’ version. What you do need is to **complete the Verifactu setup** for your company; until then, you can save drafts but when issuing you'll see a warning that Verifactu isn't active. The legal obligation comes into force for companies on 1 January 2027 and for all other business owners, professionals and self-employed workers on 1 July 2027. You'll find the details in **getting started with Verifactu** and on the **Verifactu** page.

Can it help me with outstanding payments?

Yes. Ask it ‘who owes me money?’ or ‘which invoices are more than 15 days overdue, by customer?’ and it brings you the list with your real data. It can also record a payment and match a bank transaction to an invoice, resend the invoice to the customer by email and, if your plan includes payment management, send them a payment reminder, always after you confirm it. It appears in the reminders list, like the ones Fube sends automatically. What it doesn't do is configure escalation or templates: that's managed from the payments section, and is explained in the **payment management** guide, along with what's worth knowing before asking it.

What happens if I close the browser mid-reply?

Nothing. The reply is generated on the server: when you log back in, the conversation picks up where it left off.

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