Fube

GUIDE

How to import your customers from Excel into Fube step by step



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> Hardly anyone comes to Fube with a blank customer list. Usually you have your customers in an Excel file that has been filling up over the years — their NIF, their name, their address — and the same old question: 'to switch, do I have to type it all in again by hand?'. The answer is no. This guide is for anyone who wants to move their customer list from Excel to Fube without copying records one by one: instead of retyping, you fill in a template designed to keep you from making mistakes and upload it. Before anything is written, Fube shows you row by row what will go in and what needs correcting, and you are the one who confirms.

Before you start

First things first, because it affects everything else: importing is not included in the free plan. The import wizard is a paid module; on Starter, when you open it, you will see a screen explaining what it includes and offering you an upgrade. From **Pro** onwards, you have it. What each plan includes is set out in **pricing**.

And secondly, because it is what surprises people most in a bulk import: the number of customers is limited by plan. If you upload a list of three hundred records to a plan that allows one hundred, those over the limit do not go in: they fail with 'You have exceeded the customer limit' and appear in the final report as rejected rows. Be careful, because the preview does not see it coming: the limit kicks in when writing, so in the preview those rows may show as 'Will be created'. Those that did fit stay in, so you do not lose your work, but it is worth checking the limit before preparing the file rather than afterwards.

With that clear, two more things so that the import works first time:

- **Always work on the Fube template.** You cannot upload just any Excel file: in the final upload, only the XLSX templates you download (or that Fube generates for you) from the platform are accepted. That is why the first step is to download that template.
- **Each row is one customer.** The legal name is mandatory and, for companies and the self-employed, so are the NIF/CIF and the billing address. The country defaults to Spain. The remaining fields — email, phone, contact — are optional: add them if you have them to hand.

If you want to understand what each field on a customer record means, the guide on **how to create a customer** will help, as it goes through adding a single customer field by field. Importing is the same process, but in bulk. The whole mechanism of importing and exporting your customer list is described on the **customer import and export** page.

Step 1 · Open the wizard and choose ‘Customers’

In the app, go to **Utilities › Import data**. The wizard shows a selector with the **importable data types** — customers, suppliers, products, sales documents, expenses… Choose **Customers**. Each type has its own template, so this choice determines which template you will download next.

Step 2 · Download the Excel template

With ‘Customers’ selected, click **Get template**. A dialog opens with two options:

- **Download blank template** — you download an XLSX file with the columns, drop-down lists and format that Fube expects, all ready. You fill it in by hand.
- **Populate from existing file** — if you already have your customers in your own CSV or Excel file, you upload it and Fube returns its official template with your data placed in the correct columns. This is the shortcut when you are coming from another program, described on the **customer import area** page.

For a customer list you already have organised in Excel, download the **blank template** and move on to the next step.

Step 3 · Fill in the template with your customers

Open the downloaded template and enter your customers, **one row per customer**. Keep the headers exactly as they are: they are the ones Fube recognises. Bear in mind what is mandatory:

- **Legal name** in every row.
- **NIF/CIF** and **billing address** for companies and the self-employed.
- The **country** already defaults to Spain; change it only if the customer is based abroad.

The rest — email address, phone, contact person — is optional. Do not convert the template to another format or change the column names: save it as XLSX so that it keeps accents and drop-down lists.

If you fill in a numeric column — annual turnover, for example — you can write the amounts as you normally would: **`1.234,56` and `1234.56` are both valid**. There is only one case worth knowing about because it cannot be guessed: **a number like `1.234`, with a full stop and exactly three digits after it, is read as one thousand two hundred and thirty-four**. If you meant one and two hundred and thirty-four thousandths, write it with a comma: `1,234`. And if a cell that should contain a number contains something else, that row is rejected and the report tells you which value it got stuck on.

Step 4 · Choose the import mode

Back in the wizard, select the **mode**. There are two and the difference matters:

- **Create only** — only new records go in. If a customer already exists in Fube, that row is reported and the existing record is left untouched. This is the mode for the first upload, when you start from an empty account.
- **Create or update** — existing customers are **updated** and new ones are created. Fube recognises those already there and updates their record instead of duplicating it. This is the mode for bringing things up to date.

Either way, no customer is duplicated without you seeing it: you decide whether this batch is a first upload or an update.

And here is the detail that decides whether your second import works: for customers, the field Fube uses to recognise one it already has is the billing name, not the NIF. This leads to the two typical surprises:

- Entering the same customer with a slightly different name —`ACME S.L.` one time and `ACME SOCIEDAD LIMITADA` the next— creates **two records**, even if the NIF is the same.
- Two different customers that share a company name **clash with each other**: the billing name is unique in your account, so the second one is reported as already existing.

The practical upshot: before re-importing, check that the names in the file are exactly the ones you have in Fube. That's what separates a clean update from a duplicated customer base.

Step 5 · Upload the template

Upload the XLSX template you've filled in. In this final upload, the wizard accepts **only XLSX templates generated by Fube** —the blank one you downloaded or the one Fube generated for you from your file—, not a standalone CSV or just any Excel file. Each file can be **up to 20 MB**.

Click **Review**. Fube checks the whole file and, while it does so, reminds you: **nothing is written yet**. No customer is added to your account until you confirm it in the next step.

Step 6 · Review what will be imported and confirm

Once the check is complete, the wizard shows you the **review**: three counters —**To be created**, **To be updated** and **Not imported**— and below them a table with each row of the file, the customer and what will happen to it (**Will be created**, **Will be updated** or **Not imported**). When a row isn't imported, the table tells you why: a missing NIF, a value that doesn't fit, or, in 'Create only' mode, that you already have that customer.

What you do next depends on what you see:

- **If everything is fine**, click **Import** (the button says how many records will be imported).
- **If some rows aren't imported**, Fube asks you what to do, and the option selected by default is the cautious one:
  - **Don't import anything yet**: nothing is written. You correct those rows in your template and click **Upload the file again**.
  - **Import only the valid records**: the correct ones are imported and the rest are left out; you'll need to correct them and upload them separately.
- **If none are imported**, all you can do is correct the file and upload it again.

While an import is being written, another one can't be started in the company; reviewing one, on the other hand, doesn't block anything. And if you close the window without confirming, nothing happens: the import stays in the list under **Utilities › Import data** as **Pending review**, and when you open it you return to this same review.

Step 7 · Check the result

When you confirm, Fube writes the customers, showing the progress and, when it finishes, the **result**: the total number of rows, how many were imported (**Successful**) and how many weren't (**Errors**), with a list that tells you **which one and why** —the row number and the field that fails—. If you imported only the valid ones, the ones you left out are here.

To fix them you don't need to hunt for them by hand: **Download errors** downloads your own file, with only the rows that weren't imported and the reason in an '_error' column. You correct those rows and upload it as it is; the ones that were already imported stay in.

If the entire import comes out as **Failed** —a required column is missing, the file can't be read...—, the result tells you the reason. If the problem is in the file, correct it and upload it in a **New import**. If the file was fine, click **Retry**: it checks it again and takes you back to the review, so nothing is written there either without you confirming it.

From here on, your customers are ready to invoice: when you create an invoice, you search for them and Fube retrieves their NIF and address. Every invoice you issue from Fube is recorded and **sent to the Spanish Tax Agency in compliance with Verifactu**, as standard —if you want to understand what that means, the guide to **getting started with Verifactu** explains it—.

And the other way round: exporting your customers to Excel

The reverse route also exists. From the customer list you can **export to XLSX** exactly the ones you select: you apply the filters you need (status, country, tags...), choose the customers and click export. The file contains that selection, not a dump of your entire database. It's handy for preparing a mailing, passing the list to your accountant or keeping a copy of your customer base.

Edge cases and common errors

- **‘The file is not accepted’ in the final upload.** This is almost always because you've tried to upload a CSV or your own Excel file instead of the Fube template. Go back to step 2: if your data is in a different file, generate the template with the **upload your file** option, which gives you back the XLSX that is accepted.
- **Rows that aren't imported because of a piece of data.** A misspelt NIF, a blank required field or a value that doesn't match a drop-down means that row isn't imported. The review tells you before anything is written; correct it in the template and upload it again, or import only the valid ones and re-import the outstanding ones afterwards.
- **Duplicates.** If you upload the same customer twice in ‘create only’ mode, the review marks it as **Not imported** —duplicate record— and it isn't duplicated. If you want the second upload to update the details, use ‘create or update’.
- **I have an import ‘Pending review’ in the list.** It's one that was checked and nobody ever confirmed: it hasn't written anything. Open it to return to the review and import it, or start another one if it's no longer any use to you.
- **I used the wrong file.** In the imports list, the menu of a completed one has **Undo import**: it deletes the customers it created. Those that already have invoices, quotes or anything else attached stay, and the import details tell you which ones; what an import in ‘create or update’ mode changed in records you already had isn't reverted. Imports made before the button existed can't be undone. The prior review is still the best safety net: go through it carefully before clicking **Import**.
- **‘You have exceeded the customer limit’.** Your plan allows up to a certain number of records and you've reached it partway through the batch. The earlier rows were imported; the ones that failed are in the report. Upgrade your plan and re-import only those: check the limits on **pricing**.
- **I can't find the import wizard.** It isn't available on the free plan. On Starter, the screen that opens is the one that explains the module and offers an upgrade.
- **I re-imported and my records were duplicated.** The billing names in the file didn't exactly match the ones you had. See step 4.

Frequently asked questions

Can I upload the Excel file I already have directly?

In the **final upload**, no: only XLSX templates generated by Fube are accepted there. But in the step for getting the template you can upload your own CSV or Excel file so that Fube fits it into its template; that resulting template is the one you then import.

What happens if a customer already exists in Fube?

It depends on the mode. In ‘create only’, the row is reported and the existing record isn't touched. In ‘create or update’, Fube recognises it **by its billing name** and updates the record instead of duplicating it.

Can I import customers without a NIF?

No: to create a customer record by importing, the NIF/CIF is mandatory for companies and the self-employed. (A sale to an end consumer with a simplified invoice is a different matter, as it doesn't require full tax details; you'll find that in the **invoicing** section.)

Is there a limit on customers?

Yes, and it depends on your plan. Only the top plan is unlimited; the others have a maximum number of records. The limits for each plan are on the **pricing** page.

Can I also import my projects and the hours worked?

Yes. The same wizard includes **Projects**, **Project tasks** and **Project hours**, which are imported in that order: tasks state their project, and hours state their project and their task. Hours can come with their start and end time or with the day and how many hours, as many tools export them, and those you have already billed are marked so they don't show up as pending invoicing. You'll find it step by step in **tracking a project's progress and hours**.

Does importing my customers submit anything to the tax authorities?

No. Importing means bringing your data into your account and keeping it organised; it doesn't file forms or report anything to the AEAT on its own. Filing forms and sending your invoices are separate processes. If you have any questions about what to declare and when, check with your adviser.

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