Fube

GUIDE

How to migrate your data from another program to Fube by populating the template automatically



> Switching invoicing software nearly always stalls for the same reason: not distrust of the new one, but reluctance to face the move. You have years of customers with their NIF, a product catalogue and a history of invoices in your previous software, and the idea of typing it all in again — a weekend copying rows, with the risk of duplicating a customer or getting an amount wrong — is what puts it on hold. This guide is for whoever is making that move: instead of copying by hand, **you upload the file your old program exports and Fube tries to fit your columns into its template**, so you only review and confirm. It is designed for an accounting firm migrating an entire client portfolio, but it works just as well if you are only bringing over your customer list.

Before you start

Three ideas worth being clear about so that the migration works first time:

- **The export from your previous program.** Almost any invoicing software lets you export its data to a spreadsheet (CSV or Excel). That file is your raw material: it doesn't matter that its columns aren't named the same as in Fube, because the *populate template* step tries to match them for you.
- **The order of dependencies.** Some data depends on other data: a product can belong to a category, and an invoice needs its customer and its products to have already been created. That is why you import **in layers** — first the product categories, then customers and products, and only at the end the documents. Skipping the order is the most common cause of row errors.
- **One template per data type.** You don't migrate everything in a single file: there is one template for customers, another for products, another for invoices, and so on. You will repeat the same flow once for each type.

> Fube **organises and prepares** your data for importing into your account; it does not submit anything to the Spanish Tax Agency just because you migrate. Filing tax forms and reporting to the AEAT are separate processes.

Step 1 · Open the import wizard and choose the

data type

In Fube's import section, the wizard shows the **seventeen importable data types**. Each one has its own template, so the first step is to choose **what you are going to bring over in this batch**:

Area	Types
Contacts	Customers · Suppliers
Catalogue	Product categories · Products
Sales	External invoices · External simplified invoices · Pro forma invoices · Quotes · Delivery notes
Purchases	Expenses
Team	Employees · Departments · Workplaces · Clock-ins
Projects	Projects · Project tasks · Project hours

Corrective invoices cannot be imported, neither standard ones nor those for simplified invoices: a corrective invoice is created in Fube, against the invoice it corrects.

Clock-ins have their own rules — they come in closed, without raising incidents and without touching what is already there — and you will find them in the guide to **importing clock-ins from another tool**.

Start with the foundation the rest depends on. If you are going to migrate invoices, import your customers and your products **first** — and, if your catalogue is organised by categories, the categories before the products: that way, when the invoices arrive, each one will find its customer and its lines already created. You can refer to the guide on **how to add a customer** to understand which fields the record asks for and what they mean. The same goes for projects: first the projects, then their tasks and, finally, the hours.

Step 2 · Upload the export from your old program to populate the template

With the data type chosen, open the **get template** option. You will see two options:

- **Download blank template** — you download the official Excel template with the columns already set up and fill it in by hand. Useful if you have few records.

- **Populate from an existing file** — this is the migration shortcut: you upload the **CSV or Excel file you exported from your old software** and Fube gives you back the official Fube template already filled in with your data.

Choose *populate from existing file* and select your export. Fube reads the headers of your file and **matches them automatically** with the fields in its template: a 'Name' column from your program goes into Fube's name field, 'NIF' into the tax ID field, and so on. The matching is **generic**: it tries to fit the columns of any CSV or Excel file, regardless of which program it comes from. When it finishes, you download a **populated Excel template** with your data inside.

Step 3 · Review the populated template before importing

Automatic matching gets the obvious things right, but it is **not infallible**: a column with an unusual name may not fit, and data that was in a different format in your previous program may arrive incomplete. That is why this step is the most important in the whole migration: **open the populated template and go through it row by row**.

- Check that each column has landed where it should (that the NIF is in the NIF column, not another one).
- Fill in by hand any mandatory fields that have been left empty — the header marks them — and correct anything the mapping has not understood.
- Do not change the template headers or convert it to another format: the Excel template preserves accents and special characters correctly.

If a value in your source file doesn't match the options Fube expects for a field (for example, a customer type that doesn't exist), the mapping leaves it with the default value or empty: checking it here saves you an error message later on.

The 'Reference' column: the only thing you have to make up yourself

If what you are bringing over is **documents** — invoices, simplified invoices, pro forma invoices, quotes or delivery notes — their template doesn't have one sheet: it has **two**. One is called **'Import'** and has one row per document (the customer, the date, the number); the other is called **'Lines'** and has one row for each item of each document.

What links the two sheets is a column called **'Reference'**, and it is the only piece of data in the whole template that **doesn't come from your previous program: you add it yourself**. It can be whatever you like — 'A', '1', the invoice number from your old software — on one condition only: **the same text must appear in the document's row and in all its lines**. It is not saved in Fube; it only serves to join them together when importing.

If you leave it empty, the lines are not linked to anything and the import rejects them. This is the error that most often turns a two-hour migration into a two-day one, because it doesn't show up until the end. When you review the populated template, check this column first.

Step 4 · Decide how to import: create only or create or update

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

- **Create only** — only new records are imported. If a record already exists in Fube, that row **is reported as an error** and the one you already had is left untouched. This is the mode for the first upload, when you are starting from an empty account.
- **Create or update** — records that already exist **are updated** and new ones are created. This is the mode for an update, when you already had data in Fube and want to refresh it.

And here it is worth knowing **how Fube decides that a record 'already exists'**, because it isn't what most people assume. Each data type has its own key:

Type	What Fube compares
Customers and suppliers	The **legal name**, not the NIF
Products, categories, departments and workplaces	The **name**
Invoices, simplified invoices, pro forma invoices, quotes and delivery notes	The **document number**
Expenses	The document number **and** the supplier
Employees	The **employee code**
Clock-ins	The **person** and the **clock-in time**. An existing clock-in is never updated, not even in 'create or update'

The customers and suppliers rule always comes as a surprise: two records with the same NIF and the name written differently — 'Acme SL' and 'Acme, S.L.' — are, as far as the import is concerned, **two different records**, and in 'create or update' mode you end up with both. Before an update, standardise the names in your spreadsheet.

In both cases **no record is duplicated without you seeing it**: you decide whether this batch is a first upload or an update.

Step 5 · Upload the template and review the result

Finally, upload the reviewed **Fube Excel template**. There's a key detail here: for the final upload, the importer accepts **only Excel (XLSX) templates generated by Fube** (blank and filled in by hand, or populated in step 2), not a standalone CSV or the raw export from your old program. The populate step in step 2 is precisely the bridge between that export and the template that is accepted. Each file can be **up to 20 MB**.

Before writing anything, Fube **checks the entire template** and shows you what will happen with each record: whether it will be created, whether it updates one you already have or why it won't go in, and for documents, the total that Fube calculates from their lines. Until you confirm, nothing has been written.

If any record won't go in, you choose: **don't import anything yet** (the option selected by default: you correct those rows and upload the template again) or **import only the correct ones** and leave the rest for later. If you close without confirming, it isn't lost: it stays in the list under **Utilities › Import data** as **Pending review**, and when you open it you go back to the review.

When it finishes, the **result** tells you how many have gone in and, if any row has been left out, **which one and why**. **Download errors** downloads your same template with only those rows and the reason in an '_error' column: you correct it and upload it again as is. And if an entire import comes out as **Failed**, **Retry** checks the file again and takes you back to the review, without writing anything until you confirm. Repeat the whole process for the next type of data.

Edge cases and common errors

- **Importing invoices in the wrong order.** If you upload invoices before their customers or products, the affected rows won't go in. Always import customers and products first.
- **Invoice history.** Fube can import your history of invoices and simplified invoices by marking it as **external invoices** (corrective invoices can't be imported: they're created in Fube, against their invoice): they reflect your previous numbering and **are not sent to the AEAT again**, unlike the ones you issue from Fube. That history must meet **three** conditions, and the third is the one that knocks out the most rows in a real migration:

  1. Your company must already have **at least one invoice issued in Fube** with Verifactu. Otherwise, the entire import is rejected.
  2. Each external invoice must have a **date earlier** than that first Fube invoice.
  3. **Its number cannot already exist in that series.** If the number you bring in matches one that Fube has already generated, the row is rejected with a warning such as 'An invoice with number F260001 already exists in this series'. Note: the comparison is against the **already formatted** number (with its prefix and year), so the clash appears precisely when your old numbering resembles the one Fube uses by default. The clean way to avoid it is to **import the history into a series of its own**, separate from the one you use for issuing.

Before migrating your history, it's worth understanding how series submission works in Verifactu in Fube.

- **What you import counts towards your plan.** Each record that goes in uses up allowance just as if you had created it in Fube, and external invoices do too: they use up the invoice allowance **for the current period**, even if they're from previous years, because the counter doesn't look at the invoice date. If the history doesn't fit, the excess rows are left out with the reason 'You have exceeded the invoice limit' (already at the review stage, before writing anything) and, with the allowance used up, you also won't be able to issue new invoices until the next period starts or you change plan. Before bringing in several years of history, count how many invoices there are and compare it with what your plan allows.

- **Undoing an import has its limits.** In the list under **Utilities › Import data**, the menu of a completed import has **Undo import**: it deletes what it created, except issued invoices and anything already used by another record (a customer with invoices, a product in the lines of a quote), and whatever it updated in 'create or update' doesn't go back to how it was. Imports made before the button existed cannot be undone. That's why it's still advisable to **test with a few rows** before the full batch and keep the original file in case you need to reimport.
- **No brand-specific importers.** Fube doesn't have a specific importer for any particular competitor: the mapping is generic and works on the columns of your file, wherever they come from. What changes between programs is what the export columns are called, and that's resolved by reviewing the populated template.

Frequently asked questions

Can I upload the CSV exported by my old program directly?

Yes, but in the **populate template** step: there Fube accepts your CSV or Excel file to fit it into its template. In the **final upload**, however, only the Excel (XLSX) template generated by Fube is accepted. In other words, your export goes in through the populate step, which gives you back the template that can be imported.

What happens with accents and special characters?

The Excel template preserves them correctly. Fill it in or populate the template directly without converting it to other formats, and the accents will arrive intact.

Can I also migrate customers and products, not just invoices?

Yes. There are seventeen types: customers, suppliers, product categories, products, the five sales documents (invoices, simplified invoices, pro forma invoices, quotes and delivery notes), expenses, the four team types (employees, departments, workplaces and clock-ins) and the three project types (projects, tasks and hours). Corrective invoices are not imported: they are created in Fube, against the invoice they correct. Remember the order: first the base data (categories, customers, products), then the documents that depend on it. If you are unsure about the taxes that will be applied to your documents, review how Fube handles **taxes on your invoices**.

Why does the import reject all the lines of my invoices?

Almost certainly because of the **‘Reference’** column. It is the one that links the ‘Import’ sheet to the ‘Lines’ sheet; you fill it in yourself and, if you leave it empty or it does not match exactly between the two sheets, the lines are not linked to any document and are rejected. It is explained in step 3.

Does this file anything with the tax authorities?

No. Migrating means bringing your data into your Fube account and leaving it organised; it does not file any tax forms or send anything to the AEAT by itself. For any questions about what to declare and when, check with your accountant.

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