Fube

GUIDE

How to organise your invoices and expenses by project in Fube



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> You're running three jobs at once. At the end of the month you know how much you've invoiced in total and how much you've spent in total, but you don't know what you really wanted to know: **how much each one has made**. The printer's invoice, the train ticket, the two invoices to the customer and the materials are all mixed up in the same list, and separating them takes an afternoon with a spreadsheet.

That's what Fube's **projects** are for. A project is a label with a memory: you create it once, you add it to each document for the job as you record it, and from then on you have all the job's paperwork together — in the project's own **Documents** tab — and its income and its spending kept separate, without having entered anything twice.

Before you start: check whether your plan includes it

Projects is not available on Starter or Pro. It comes with Business and Elite, with different limits:

Plan	Projects
Starter	Not included
Pro	Not included
Business	5 projects
Elite	Unlimited

You'll see the **Projects** entry in the side menu whatever plan you have, so don't rely on it: if your plan doesn't include it, when you open it you'll find a card that explains the module and offers to change plan, and the project selector on invoices and expenses appears **disabled**, with a notice below it. You'll find everything on the pricing page.

Step 1 — Create the project

Go to **Projects › My projects** in the side menu and click **Create project** — or press the `N` key, which does the same thing.

Of the whole form, **only the name is required**. You can save with just that and carry on. But there are five optional fields that decide things later on, and it's worth knowing what they are before skipping them:

- **Customer**. If the job is for a customer, enter them here: when you create an invoice or a quote from the project (step 2), the new document will start with them already selected.
- **Budget** and **Hourly rate**. They go together: the *budget used* you see in the list of projects and in each one's overview **is only measured in euros if you've filled in both**. With only one, the list compares the time logged with the tasks' estimated hours, and if there are no estimates either it leaves that cell blank; the overview tells you it still needs setting up.
- **Allowed task statuses**. These are the columns that project's board will have. A new project starts with three (to do, in progress and completed); if your work goes through a review stage, or you want a column for what gets dropped, add ‘In review’ or ‘Cancelled’.
- **Colour**. It's the dot in front of the name in the list and on each project's card, and what tells them apart at a glance when you're running several.

The start and end dates don't block anything or trigger email reminders, but they are visible: the **End** column in the list shows how many days are left (in amber when there's a week or less to go) or how many days ago it ended, and you can use them to sort and filter.

Whoever creates the project becomes its Owner. That matters for step 6.

Step 2 — Link each document to its project

This is where the real work is, and it takes thirty seconds per document if you do it when you record it. There are two ways, and the second is the quicker one.

From the document form. When creating or editing an invoice, a quote or an expense, scroll down to the **More options** section, the last one in the form. That's where **Linked project** is: choose the project and save. The **Tags**, for free-form classification, are in the same section.

That selector only lets you choose from projects that already exist: **you can't create a new project from the document form**. If the job hasn't been set up yet, create it first in Projects and come back.

From the project itself. Open the project, go to its **Documents** tab, choose the type from the drop-down and click **Create invoice**, **Create quote**, **Add expense**... The new document opens with the project already set and, for sales documents, also with the project's customer, if it has one. You fill in the rest and save; there's no need to remember to scroll down to **More options**.

These are the documents that can be linked to a project:

Document	Can it be linked to a project?	Can it be created from the Documents tab?
Invoice	Yes	Yes
Simplified invoice	Yes	Yes
Quote	Yes	Yes
Pro forma invoice	Yes	Yes
Delivery note	Yes	Yes
Expense	Yes	Yes, manual entry
Corrective invoice (and the simplified one)	Yes	Better from the invoice it corrects

Two points about that last column. **Corrective invoices are best created from the invoice they correct**: that way they inherit its details, project included. In the tab they don't have a create button next to the drop-down; if the project doesn't have any yet, the empty list offers **Create corrective invoice** (or **Create simplified corrective invoice**), which opens a blank form with the project already set. And for expenses, the button in the tab is for **manual entry**: entering an expense by reading the receipt with AI is done from **Purchases**, and the project is then set in **More options** when you review it.

A document belongs to a single project. There's no splitting or percentages: if an invoice covers two jobs, either split it into two invoices or decide which of the two to allocate it to.

Step 3 — See everything in the project in its Documents tab

Each project has a **Documents** tab, next to **Work reports**, with everything linked to it. It isn't a separate screen with its own rules: it's the usual list for each document type, with its filters and totals, but showing only the project's documents.

- **You choose the type in the drop-down** at the start of the row: invoices, simplified invoices, corrective invoices, simplified corrective invoices, quotes, pro forma invoices, delivery notes and expenses. When you open it, each type shows **how many documents the project has**, so you can see at a glance what there is of each type, or whether there are expenses you weren't expecting.
- **The figures at the top are the project's.** For invoices, the strip shows how much has been invoiced, collected, is outstanding and overdue for that job; for expenses, how much has been spent, paid and is still to be paid. The numbers on the status tabs (issued, drafts, cancelled; for expenses, those pending approval) also count only the project's documents.
- **Each row opens the document in its usual record**, the same as from Sales or Purchases.
- **To get the project's documents out**, select them (or select the whole page) and open **Actions**: for invoices you have **Export invoices** and **Download invoices (PDF)**, and for each type, its own options (for expenses, **Export expenses**).

The tab only shows the document types your user can see: if you haven't given someone on your team access to expenses, they won't appear in their drop-down.

Step 4 — See what the job has made

For the question at the start — how much it has made — you have two places to look.

The project overview. Each project's **Overview** tab shows, for the period you choose at the top, the amount **invoiced** to the project — excluding taxes and drafts — and the **margin**: the amount invoiced minus the project's expenses in that same period, also excluding taxes.

The Sales and Purchases overviews, with the project selected. In **Sales › Overview** and in **Purchases › Overview**, next to the period selector, there's a project filter. Choose one and the figures at the top that depend on it are recalculated:

Overview	What is filtered by project	What is NOT
Sales	The amount invoiced in the period, its chart and what is still to be collected	The average invoice, days to payment, the collection of the amount invoiced, the breakdowns by customer and by product, quotes, taxes and the outstanding list
Purchases	Expenses for the period, input IVA, its chart and what is still to be paid	Expenses to review, the breakdowns by category and by supplier, taxes and the outstanding list

In other words: for **how much has come in and how much has gone out on this job**, the filter gives you the answer. Everything else on those screens still answers for the company as a whole even when you have a project selected.

Step 5 — Use the status to avoid clutter building up

A project has five statuses: **Active**, **On hold**, **Completed**, **Archived** and **Cancelled**. They don't change any calculation or affect documents already linked; they are there so that everything stays readable once you have twenty jobs on: in **My projects**, the filter on the **Status** column hides the ones you don't want to see, and in **Projects › Projects dashboard** the **Active projects** indicator shows how many you have on hold, finished, archived or cancelled.

The useful distinction is between the two end states: **Completed** means 'this went well and it's done', and **Archived** means 'I don't want to see it day to day'. Archiving is also the way out when you want to delete a project and can't, which is one of the cases below.

Step 6 — Decide who can work on the project

Each project has its own **Members** tab, with four roles: **Owner**, **Manager**, **Member** and **Viewer**. You add people from there, choosing the person and the role.

What isn't obvious: **only the Owner and Managers can edit or delete the project**, and this takes precedence over your account's general permissions. Someone with company-level project permissions who is a Member or Viewer on *that* project will get 'Only owners and managers can edit or delete the project'. If this happens to you, it isn't an account permissions fault: it's your role within that particular project. The exception is the company owner and administrators: they count as Manager on every project, even if they aren't members.

The Owner role isn't chosen when adding someone: it belongs to whoever created the project, and only they can transfer it from **Members**.

Edge cases and common mistakes

- **It won't let you delete the project.** That's normal as soon as it has invoices, expenses or other linked documents: it can't be deleted, Fube tells you so and offers to **Archive** it. Archiving moves it to Archived without touching a single document. There's no need to unlink anything or set it to Cancelled.
- **You recorded the expense without linking it.** Nothing is lost: edit the expense, choose the project under **More options** and save. From then on it appears in the project's **Documents** tab and in its figures.
- **You look for the project in the form and can't see it.** It's under **More options**, the last section. If you came from the project's **Documents** tab, it's already filled in.
- **You want to correct an invoice on the project.** Do it from the invoice: the corrective invoice is created from it and you then see it in **Documents**, under the **Corrective invoices** type.
- **One invoice covers two jobs.** Pick one. If the split really matters, the clean way is to issue two invoices.
- **The Sales overview still shows the same numbers with the project selected.** Check which figure you're reading: average invoice, days to payment and the breakdowns ignore the project on purpose (table in step 4).
- **You have five projects and the Business plan won't let you create another.** The Business cap is five. Archiving one doesn't free up a slot: the limit counts existing projects, not active ones.

Frequently asked questions

Do projects change anything in my taxes or my AEAT forms?

No. They are an internal layer of organisation. Your record books and your tax forms take into account **all** of the company's documents, without filtering by project.

Can I put a document in several projects at once?

No. Each document is linked to a single project. For classifications that do overlap, there are **Tags**, in the same section of the form.

Does the project list tell me how much each one has invoiced?

The list doesn't: the amount invoiced and the margin for each job are in each project's **Overview**, and its individual documents in its **Documents** tab. What the list does show for each project is its status, the progress of its tasks (a bar per status and how many are done out of the total), those that are overdue, the hours logged in the period you choose at the top with the change against the previous period, the budget used, the end date and, in card view, the team. You can view it as a table or as cards, and clicking a project opens its overview. Figures for the whole portfolio — hours, tasks completed, new tasks and active projects — are in **Projects › Projects dashboard**.

Can I export a project's invoices?

Yes. In the project's **Documents** tab, choose **Invoices**, select the ones you want — or the whole page — and under **Actions** click **Export invoices** or **Download invoices (PDF)**. For the other types, **Actions** offers the equivalent; for expenses, **Export expenses**. To export the whole company's data, without splitting by project, see **how to export your invoices and expenses**.

What about tasks, hours and budget used?

That's the other half of the module and it has its own guide: **track a project's progress, hours and budget**.

Link documents now and save yourself the month-end cross-checking

Creating the project takes a minute and linking each document is one drop-down, or none if you create it from the project. What you get in return is being able to answer, in January, how much that October job really made and show its paperwork in two clicks, without opening a spreadsheet or relying on memory. **Create your free account** or see the module in detail in **project management**.

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