Fube

GUIDE

Understanding your dashboard in Fube



fube.es

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> The dashboard (**Home** in the menu) is the first thing you see when you log in to Fube, and it isn't just decoration: it's a snapshot of how your business is doing and of what you need to do today. The beauty of it is that you don't have to feed it anything. Every invoice you issue and every expense you approve also becomes a figure on the Home page. This guide shows you how to read it properly (what each block means, what each figure is compared with and why a total sometimes doesn't match what you expected) so that opening Fube in the morning gives you a clear answer to the usual question: *how am I doing?*

Where the figures come from

Before reading anything, keep the underlying idea in mind: **the Home page is calculated automatically from your documents**. There's no spreadsheet to fill in and no 'refresh' button. As soon as you start invoicing and recording expenses, the figures fill themselves in, on the free plan too.

Three practical consequences are worth being clear about from the outset:

- **Drafts don't count.** A draft invoice isn't yet a document with any effect, so it isn't added in. If a total seems low, the first thing to check is whether you have invoices for the period that haven't been issued.
- **An expense counts once it's approved.** A receipt that the AI has read but that you haven't approved yet isn't added to your expenses. That's why 'Approve expenses' appears among your to-dos: until you do it, that money isn't in the figures.
- **Each invoice counts in the month of its transaction date, not its issue date.** Invoiced amounts, the result, outstanding amounts and the charts place each invoice in the period of its **Transaction date** (the day you did the work or delivered what you sell), which is the same date used by the Modelo 303 and 130 drafts. The same applies to expenses. So if you issue an invoice in October for work done in September, Fube adds it to September, just like the third-quarter 303, and the two figures match.

Only two figures go by issue date, because what they measure is the act of issuing, and both are in the Sales summary: **Days to payment** (the days that pass between issuing and getting paid) and **Quotes**, which count each quote by the day you issued it.

Step 1 — Choose the period in the figures bar

Right at the top there's a bar with five figures and, in its left-hand corner, a button with a calendar and the name of the period you're viewing. By default it's **'This quarter'**, the tax return period. Clicking it opens the picker:

- **The shortcuts**, on the left: 'Last 7 days', 'Last 30 days', 'Last 90 days', 'Last 12 months', 'This month', 'This quarter' and 'This year'.
- **'Last'**, at the top: type a number, choose 'Days' or 'Months' and tick or untick 'Include today'.
- **The calendar**, for a custom range: click the first day and the last. You'll see 'Custom range' highlighted. It won't let you choose days that haven't arrived yet.
- **At the bottom**, the range you're about to apply, with **'Cancel'** and **'Apply'**. Nothing changes until you click 'Apply'.

Fube remembers the period in that browser, and it's the same one used by the Sales, Purchases and other module summaries that have this bar: if you choose 'This year' on the Home page, you'll also find it when you open the Sales summary. On another computer or in another browser it starts again at 'This quarter'.

What period each figure is compared with

Each figure for the period is compared with an earlier stretch of the same length. Which one depends on the shortcut:

If you choose…	It's compared with…
'Last 7 days', 'Last 30 days', 'Last 90 days' or a custom range	The same number of days immediately before
'Last 12 months'	The previous 12 months
'This month'	The same stretch of last month, from the 1st to the same day
'This quarter'	The same stretch of last quarter
'This year'	The same stretch of last year

You can see the comparison in three places: the percentage next to each large amount, the **dashed line** on the charts, which is the previous period, and the legend underneath, with the dates of both. The percentage is shown in green when the change is good (invoiced amounts go up, expenses go down) and in red when it isn't. For periods of up to three months, the charts are by day; for longer periods, by month.

Step 2 — Read the five figures in the bar

These are the ones almost everyone looks at first:

- **Invoiced** — the amount invoiced in the period, taxes included: your issued invoices and simplified invoices, with their corrective invoices. Disbursements don't count, because they're your customer's money, and the money on account you deduct on a fee note doesn't reduce it: a fee note invoices the same amount with or without disbursements.
- **Expenses** — your approved expenses for the period, taxes included, excluding what you paid on a customer's behalf.
- **Result** — the amount invoiced minus expenses. Here you can see whether the period ends in profit or in loss, not just how much money has moved.
- **Receivable** — what your customers owe you **today**, whatever the invoice date, less any payments on account they've made. Disbursements are included here: they owe you those too.
- **Payable** — what you owe **today** for your expenses, whatever their date.

Two points to avoid misreading them. First: **'Receivable' and 'Payable' don't depend on the period**. They're what's outstanding today, whichever period you choose. Second: **invoiced is not the same as collected**. You can have a quarter with a lot of invoicing and, at the same time, a high 'Receivable' because your customers haven't paid yet. If you want to chase every unpaid invoice with reminders, that lives in payment management, within Treasury, from the Pro plan.

And since Invoiced and Expenses include taxes, the Result isn't your profit for tax purposes: the IVA you charge isn't yours. That's what the tax form drafts are for.

Each figure's chart, on hover

Next to Invoiced, Expenses and Result you'll see a small line showing their trend. And when you hover over any of the five figures (or reach it with the Tab key), its full chart opens underneath, without needing to click. If you move to the next figure, the chart changes without closing; the Escape key closes it.

- For **Invoiced**, **Expenses** and **Result**, the chart is for the period, with the amount, its percentage change and the dashed line for the previous period.

- For **Receivable** and **Payable**, the chart spreads what's outstanding by the month of each document (that of its transaction date) over the last 12 months. It has no previous period, because it's what's owed today, and the total also includes older amounts.

On a phone the bar scrolls sideways and the chart doesn't open, but the invoiced chart and its breakdown are just below.

Step 3 — See what's waiting for you in the greeting

In the centre of the screen Fube greets you by name and, underneath, tells you how the day looks: **'Here's what's waiting for you today.'** if you have something pending, or **'All up to date. Let's carry on.'** if there's nothing left.

Just below is the assistant box, with example phrases that change ('Ask the assistant something…', 'Which payments are outstanding?'…). Whatever you type opens the assistant at full width, in a new conversation, and while its panel is open the box disappears from the Home page, because you already have it alongside. If it's your first time using it, it helps to read **getting started with the AI agent**.

Your to-dos, as shortcuts

Below the box, pending items appear as shortcuts, each with its number and worded as the action to take. Clicking one takes you straight to the list that contains it. There are six:

- **'Collect overdue'** — issued invoices whose payment is past due, including those that were only partly paid.
- **'Collect simplified'** — the same, for your simplified invoices. They are kept separate because they are two different lists and a click can only land on one.
- **'Review Veri*factu'** — invoices whose submission to the AEAT did not go through. It takes you to the Verifactu screen, where you can see the reason; what to do in each case is explained in **resolving Verifactu errors**.
- **'Issue drafts'** — invoices you prepared but never got round to issuing. This is, by far, the number that surprises people the most.
- **'Issue simplified'** — the same, for simplified invoices.
- **'Approve expenses'** — expenses that the AI has read and are waiting for your approval, or that it could not read.

The number is shown in red when it is money owed or an issue with the AEAT — overdue invoices and Verifactu — and in grey when it is work in progress. Three rules worth knowing:

- **A shortcut at zero is not shown.** There are no '0' boxes taking up space: if you see none and the greeting says 'All up to date. Let's keep going.', you have nothing pending.
- **If you do not have permission for something, that shortcut does not appear.** You will not see a misleading zero: the shortcut simply does not exist for you.
- **The number and the list it takes you to are the same set**, except for 'Approve expenses'. There you land on the 'Pending approval' tab of the list, which is a **wider** set because it also includes expenses that the scan is still reading. If the shortcut says 7 and the list shows 9, it is not a fault: the extra two have not been read yet.

If you are just starting out: the activation card

While you are getting your account ready, the **'Let's prepare your first invoice'** card appears between the greeting and the chart, with the steps you still have left. It is a help to get started, not a figure: it ticks itself off as you complete things and disappears when you finish, or sooner if you close it with the X. The full walkthrough is in **getting started with Fube**.

Step 4 — Review what you have invoiced and its breakdown

Below the greeting there are two cards, side by side on a wide screen and one above the other on a phone.

'Invoiced over time' is the chart of what you have invoiced in the period: the amount at the top with its percentage change, the line for the period and, dashed, the line for the previous one. It is the quick way to see the trend and not just the figure on its own.

'Breakdown', to its right, goes from what you have invoiced to the result, with what is outstanding underneath:

- **Invoiced** and **Output IVA** — what you invoiced in the period and the IVA it carried.
- **Expenses** and **Input IVA** — your expenses for the period and their IVA.
- **Result** — what you invoiced minus expenses.

- **To collect** and **To pay** — what is outstanding today, as in the strip.

The third column is the change compared with the previous period, or a dash if there is no data to compare with; the IVA change is shown in grey, because whether it goes up or down is neither good nor bad. If you hover over a row, it explains what the figure is and how much it has changed. And **'Invoiced' and 'Expenses' are links**: they take you to the Sales and Purchases overviews, which Step 6 covers.

Step 5 — If you work with projects: 'Your projects'

If your plan includes Projects — Business and Elite — and you can view them, the **'Your projects'** card appears at the bottom of Home: 'What's due this week, the timer and your hours this month', without going into the module. It has three columns:

- **'Today and overdue'** — tasks assigned to you, not yet finished, that are due today or are already overdue, with those closest to today at the top.
- **'Next 7 days'** — those due from tomorrow to a week from now.
- **'Your hours in October'**, or whichever month you are in — the time you have logged this month and the status of the timer: what is running, with the button to stop it, or 'Timer stopped. Start it with ▶ on a task.'. If a timer was left running for too long, it warns you here with 'You left a timer running' — it does not add anything until you set its end time — and the 'Set its end time' button.

Each column shows up to four tasks and, if there are more, 'And 1 more.' or 'And N more.'. Clicking one opens its panel, and with ▶ you start its timer. At the top right, **'My hours'** takes you to the details of all the time logged. Without the Projects module, the card does not appear and Home does not miss it.

Step 6 — For the other charts, open the Sales and Purchases overviews

Home sticks to the essentials. Everything else — who you sell most to, which products are selling, where your spending goes, how payments are going, quotes and taxes — lives in two overviews. You reach them from the side menu: clicking **Sales** opens its **Overview**, which is the first entry in the module, and the same with **Purchases**. Or from the Breakdown on Home, by clicking 'Invoiced' or 'Expenses'.

Both work like Home: at the top, the same strip with the same period; in the middle, what is pending for that part of the business; and below, the cards. If you work with projects, next to the period there is also an **'All projects'** button to view a single project. It filters what you have invoiced, expenses and their IVA, what is outstanding to collect and to pay, and the chart for the period; the average invoice, days to payment, the breakdowns, quotes and taxes still cover the whole business.

In Sales › Overview:

- The strip shows **Invoiced**, **Average invoice**, **Days to payment** — how long, on average, it takes customers to pay the invoices you issued in the period that have already been paid — and **To collect**.
- What is pending in sales: the Home shortcuts that relate to sales plus one more, **'Respond to quotes'**, with those still awaiting a response.
- **'Invoiced over time'** and, next to it, **'Payment of invoiced amounts'**: which part of what was invoiced in the period has been paid today and which has not, status by status.
- **'By customer'** and **'By product or service'**: what you have invoiced to each customer and for each item in your catalogue, with 'View all' when the list does not fit.
- **'Quotes'**: how many end up accepted, how many are still pending, rejected or expired, and the amount converted compared with the amount quoted.
- **'Taxes'**: what you would have to pay to the tax authorities or would get back for the period, with output and input tax, IRPF withheld and the equivalence surcharge, and the IGIC or IPSI details when you do not invoice with IVA only. It is for guidance only and does not replace your tax adviser.

In Purchases › Overview:

- The strip shows **Expenses**, **Input IVA**, **To pay** and **To review**: expenses that the AI has read and are waiting for your approval, or that it could not read.
- What is pending in purchases: **'Approve expenses'** and **'Pay overdue expenses'**.
- **'Expenses over time'**, with **'By category'** next to it, **'By supplier'** and **'Taxes'**.

What belongs to each plan. The figures for the period, their charts and what is pending are available on all plans. The average invoice, days to payment, payment of invoiced amounts, the breakdowns by customer, product, category and supplier, quotes and taxes are part of **Advanced statistics**, included in the **Business and Elite** plans. Without them, in place of the breakdowns you will see the 'Advanced statistics' card with the 'Upgrade plan' button. What each plan includes is set out in pricing.

Comparing with last year

A common question: you do not need a separate report to compare with the previous year, and it is available on all plans. Choose **'This year'** and every figure is compared with the same stretch of last year: the dashed line on the chart is last year, month by month. With **'Last 12 months'**, the comparison is with the previous twelve months. This works for what you have invoiced and also for expenses — hover over 'Expenses' in the strip or open the Purchases overview — which is what gives you the real picture of whether the business is improving or just getting bigger.

Edge cases and common errors

- **'This quarter I've invoiced less than I thought.'** Check that you don't have any invoices for the period in **draft** (the 'Issue drafts' shortcut shows them to you) and, among your expenses, that none are still awaiting approval.
- **'The total doesn't match what I expected.'** Look at the period button in the corner of the strip. Fube remembers the last one you chose, even if you changed it in another summary, such as the Sales or Purchases one, so it's easy to end up on a range that isn't the one you think.
- **'In October I issued some invoices for July to September and they don't appear in October.'** That's expected: Fube counts them in the month of their transaction date (July, August and September), which is also where the draft Form 303 for the third quarter places them. For an invoice to count in the month in which you issue it, its transaction date has to be in that month.

- **‘I've changed the period and “To collect” doesn't move.’** That's expected: ‘To collect’ and ‘To pay’ are what's outstanding today and don't depend on the period.
- **‘I don't see the percentage change.’** There's no data in the previous period to compare against. In the Breakdown you'll see a dash in its place.
- **‘On my mobile the chart doesn't open when I tap a figure.’** On a phone the strip's chart doesn't open; the invoiced amount chart and the Breakdown are just below.
- **‘I invoice with IGIC and in the Breakdown IVA shows as zero.’** The ‘Output IVA’ and ‘Input IVA’ rows in the Breakdown only count IVA. You'll find IGIC and IPSI in the ‘Taxes’ card of the summaries, which is part of Advanced statistics.
- **‘I don't see any shortcuts below the greeting.’** Then you have nothing pending, and the greeting says so: ‘All up to date. Let's keep going.’. They can't be disabled or hidden, so their absence is good news.
- **‘I can't see the breakdown by customer or by product.’** These are part of Advanced statistics, on the Business and Elite plans. On the other plans, including the free one, you get the figures for the period, their charts and what's outstanding, plus the plan upgrade card where the breakdowns would go.
- **‘The amount to collect doesn't go down even though the customer has already paid me.’** Home reflects what is recorded in Fube. If the payment isn't marked, it will still count as outstanding: record the payment (or reconcile it with the bank) and the figure updates.
- **‘Does this replace my accounting?’** No. Home is a business overview, not official accounting or professional advice. It helps you understand your activity and arrive better organised at your accountant's, but the formal tax side follows its own course in the Taxes forms.

Frequently asked questions

Do I have to set anything up for the dashboard to work? No. As soon as you start issuing invoices and recording expenses, Home fills itself in. It's part of the experience from day one, including on the free plan.

How often is the data updated? The figures reflect your recorded activity and are recalculated when you open Home and when you change the period. Remember that draft invoices and unapproved expenses don't count yet.

Which date does the dashboard use for each invoice? Its transaction date, the same one used by Forms 303 and 130: an invoice issued in October for work done in September counts in September. The two figures that go by the issue date are days to payment and quotes, both in the Sales summary.

Can I compare this year with last year? Yes, on all plans: choose ‘This year’ in the period selector and each figure is compared with the same stretch of last year, with its dashed line on the chart. It works for the invoiced amount and for expenses.

Can I see which products work best for me? Yes, in the ‘By product or service’ card of the Sales summary, which is part of Advanced statistics (Business and Elite plans). It sorts your catalogue by what has invoiced most, excluding taxes, in the chosen period.

Where is the project filter? In the Sales and Purchases summaries, next to the period: the ‘All projects’ button. Home always shows the whole business. The filter appears if your plan includes Projects and you can see them.

Why do I see some pending items and a colleague sees others? Because each shortcut depends on what that person can see. If their role doesn't have permission for invoices or expenses, those shortcuts aren't shown to them (not even at zero), so they may see ‘All up to date’ while you have seven overdue invoices in front of you.

Can I take this data to my accountant? Yes. Beyond Home, the **business reports** let you export the period's information (income and expense ledgers in Excel, or the invoices in a ZIP) to review it or pass it on to your accountant.

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