Fube

GUIDE

How to create a work report that the customer signs on their mobile



> If you do jobs at your customers' homes or on a building site, you know the paper report: it gets filled in hastily at the end, the customer signs it on the bonnet of the van, the sheet gets crumpled in the glovebox and, days later, someone has to decipher it to make the delivery note or the invoice. And if the customer disagrees with the hours, the only proof is that sheet.

With Fube's work reports, the technician fills in the report on their phone, the customer signs it with their finger on the same screen and, from then on, the report is sent, counts as project hours and becomes a delivery note or an invoice without typing anything twice. This guide covers the whole process.

Before you start

- **A plan with Projects.** Work reports live within the Projects module, which comes with the Business and Elite plans. You can see what each plan includes on the **pricing** page.
- **A user for each person who makes work reports.** Whoever fills in the report and hands it to the customer to sign logs in to Fube with their own user and a Projects role; the **Projects collaborator** role is enough to choose the customer and search the catalogue, without seeing prices or invoices. If the report is for a site, they also need to be a member of that project. The guide to **inviting your team and assigning roles** explains how to add them; further down, in 'Who sees what', you'll find what each role can do with work reports.
- **If the hours are charged, the project's rate.** When you invoice a work report, Fube prices the hours at the project's **Hourly rate**. If the work isn't for a project, or the project has no rate, the hours come out at zero and you set the price when reviewing the invoice.
- **A connection on the phone.** The report is saved and signed in Fube, so you need mobile data or Wi-Fi at the moment you save it and sign it.

Step 1 · Fill in the work report

Go to **Projects** → **Work reports** and tap **New work report**. If the job is for a site you already have as a project, you can also open the project's **Work reports** tab: the report is created with the project and its customer already filled in.

The screen is designed for mobile and has four sections:

1. **Who it's for and where.**
   - **Customer**: who the work is being done for.
   - **Project or site**: optional, and only the sites you are a member of are shown. If you choose one, Fube fills in its customer; if you change the customer, the site is removed, because it belonged to the previous one. With a site, the hours are recorded against it when the report is signed (step 4).
   - **Date**: the day the work was done.
   - **Where**: only if it wasn't at the customer's address (‘Unit 3 on the industrial estate’, ‘2nd floor, B’).
2. **What was done.** The work, in free text: ‘Replaced the bathroom pipe and pressure test’. This is what the customer will read before signing, so clear is better than short.
3. **Hours.** The report already comes with a time slot in your name, **Start** at 8:00 and **Finish** at the current time (to the nearest quarter of an hour). Adjust the times and, with **Add hours**, if there were several of you or there was a long break, add a slot per person and per time period. Fube calculates the hours for each slot and warns you if a finish time is earlier than its start time.
4. **Materials.** With **Add from catalogue** you choose a product you have already set up; with **Add material** you type the name by hand (‘Brass elbows’). In both cases, with its **Quantity**.

The work report **has no prices**: whoever is on site records what was done, not what it costs. Prices appear later, when it is converted to an invoice or a delivery note.

Tap **Save work report**. Fube gives it the next number and opens its record. Until it is signed, you can go back and **Edit** it as many times as needed.

Step 2 · Get the customer to sign it

In the work report's record, tap **Sign**. **Customer signature** opens, starting with a reminder of what is about to be signed and how many hours it includes. Hand the phone to the customer, or fill it in together:

- **Signatory's name**: the person signing, who doesn't have to be the customer account holder (the site manager, the tenant…).

- **DNI**: optional.
- **Signature**: with a finger, in the box.

Tap **Sign work report**. Fube won't let you sign an empty report (it must include hours or materials) nor one with a finish time earlier than its start time.

When it is signed, Fube stores **who signed, the date and time, from which connection and which browser**, and a copy of the report's content exactly as the customer saw it, with its **fingerprint**, a code that would change if anyone altered a single comma. The report's PDF has the signature and that fingerprint printed on it.

From then on, **the signed work report cannot be changed or deleted**: it is the proof of what the customer approved. If something needs correcting afterwards (an extra material, a price), it is corrected in the delivery note or invoice created from it.

Step 3 · Send it to the customer

As soon as it is signed, **Send the work report to the customer** opens automatically, with the customer's **billing email** already filled in, a subject and a message you can change, and the signed PDF attached. You can add up to three CC addresses. Tap **Send**, or **Not now** if you'd rather send it later.

To send it later, or to someone else, open the work report and tap **Send**. In the side panel of the record, **Sent emails** tells you who it was sent to and when, and **View all** opens the full list. A work report can be sent up to ten times, and only once it has been signed: an unsigned report can still change.

Step 4 · The hours go to the project

If the work report is for a site, when it is signed each time slot becomes hours logged on the project, on the report's date and at the **hourly rate** the project has at the time of signing. You can see them in the project's **Time** tab, marked as coming from a work report, and they count in its summary like any other hours: in budget consumption, in the breakdown per person and in profitability. How to read all of that is explained in the guide to **tracking the progress and profitability of your projects**.

Two things worth knowing:

- **Those hours can't be edited from the project.** They come from a signed document, so they stay exactly as the customer signed them.
- **'Invoice these hours' doesn't offer them.** They are invoiced through the work report (step 5), so nobody charges for the same hours twice.

If the work report isn't linked to a site, its hours stay in the report and aren't recorded on any project.

Step 5 · Convert it to an invoice or a delivery note

Once the work report is signed, its record offers to convert it. Whatever you choose comes with the report's lines, without typing them again:

- The **hours**, one line per person ('Labour · Ana López'), with the time slots in the description and at the project's hourly rate (at zero if there is no project or rate).
- The **materials**, in the order of the report: those from the catalogue with the price and IVA from their record, and those typed by hand at zero, so you can price them.

Choose your route:

- **Invoice** creates a **draft invoice** and opens it. Review it (prices, taxes, payment method) and issue it like any other.
- **Convert to delivery note**, in the **More** menu, creates an **already issued delivery note**, with the report's date and with who received it and when copied from the signature. You invoice it later from the delivery note, like any other: see **from sales order and delivery note to invoice**.

A work report can be converted **only once**: to an invoice or to a delivery note, not both. In the side panel of the record, **Invoicing** tells you whether it is **Not invoiced**, **Converted to delivery note** or **Invoiced**, with a link to the document.

These buttons are visible to whoever can create invoices or delivery notes. A technician who only makes work reports doesn't see them: they sign and send, and the office handles invoicing.

Find your work reports

The list under **Projects** → **Job sheets** is sorted from the most recent day to the oldest and is split into **All**, **Unsigned**, **Signed** and **Not invoiced**. Above it, a strip totals the hours in the list, the hours still to be signed and the signed hours you haven't yet converted to a delivery note or an invoice: work done that you haven't invoiced yet.

If you select several job sheets, **Actions** lets you download them as PDFs, one per job sheet. In each project, the **Job sheets** tab shows only that project's job sheets.

Who sees what

Job sheets have their own permissions within the Projects roles:

Role	What they can do with job sheets
Projects Collaborator	Creates, edits, gets signed by the customer and sends **their own** job sheets. Can't see other people's or delete
Projects Manager	Creates, gets signed and sends job sheets; sees everyone's, and edits or deletes those not yet signed
Projects Auditor	Sees everyone's, without changing anything
Owner	Everything

Invoicing a job sheet or converting it to a delivery note also requires permission to create invoices or delivery notes.

Common mistakes

- **Signing before checking.** Once it's signed, there's no going back. Read through the job sheet with the customer before handing them your phone: that's what they're going to sign.
- **Forgetting the job.** If the work belongs to a project and you don't select it, its hours don't reach the project and don't count towards its quote. If you create the job sheet from the project's **Job sheets** tab, you won't forget.
- **A project with no hourly rate.** The hours reach the invoice at zero. Set the rate on the project before invoicing, or enter the price manually in the draft.

- **One job sheet for several days.** A job sheet covers one day. If the work lasts a week, create one job sheet per day: each with its own hours, signature and date.

Frequently asked questions

Can the customer sign from home, without being there?

No. The job sheet is signed on the phone of the person who did the work, there and then. What you can do is email them the signed PDF afterwards (step 3).

What value does the job sheet signature have?

It's a hand-drawn signature, like the one the customer would put on paper, and Fube also records who signed, when, from which connection and a fingerprint of the content that proves what was signed hasn't been altered afterwards. It serves as a record that the customer accepted the work. If you need a signature with stronger guarantees for a specific contract, check with your adviser.

Does the job sheet go to Verifactu?

No. The job sheet isn't an invoice and has no tax effect. What goes to the AEAT is the invoice you issue from it, like all invoices in Fube.

Can I create a job sheet without a project?

Yes. The project is optional: the job sheet always goes to a customer and, if there's a job, to its project too. Without a project, the job sheet is signed, sent and invoiced in the same way; its hours just aren't recorded anywhere else.

Is it any use to me if I still do job sheets on paper?

Yes, and you can use both side by side for a while. If for now you only need a template to print, there's the **job sheet generator**. When you want the job sheet to be signed on a phone and turn into an invoice automatically, this is it. And if you don't have Fube yet, **Projects** shows you everything the module includes.

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