

Adding a new client

Short tutorial on adding a new client

- [Adding a new client](#)

Adding a new client

Click the “Add new client” button or create a new order. If a client is not registered in the database yet, you will be prompted to add the new client when you create the new order. It is only possible to add new clients in connection to orders.

Please note that clients added to the database are visible to all members after you enter the first three letters of the client's name. If a client with a similar name already exists in the database, you will be able to see them and select your client. Please do not enter clients twice in the database.

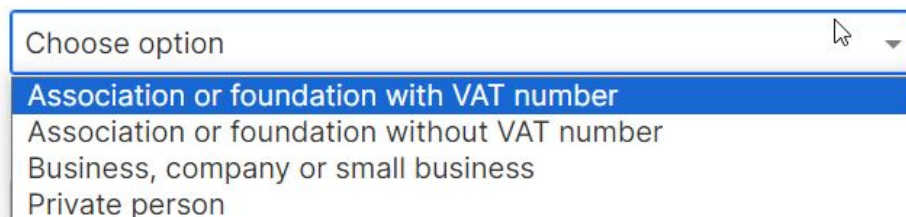
Client Details

The client is the company/enterprise/association/individual with whom you are arranging the order. We need the client information in order to issue an invoice. If the client is new and has not been entered into the portal database, you will have to create a client profile first.

Type of client

Here you can choose from different options. You must specify whether the client is a business or a private person. Business clients are legal entities, such as associations, limited liability companies, registered companies, etc.

Type of client

A screenshot of a web form showing a dropdown menu. The dropdown is open, displaying four options: 'Association or foundation with VAT number' (highlighted in blue), 'Association or foundation without VAT number', 'Business, company or small business', and 'Private person'. The text 'Choose option' is visible in the dropdown's header area, and a mouse cursor is hovering over the dropdown arrow.

We differentiate between business clients with or without **the international VAT number** in the EU zone. Please always provide us with the client's international VAT number, so that we can verify it and issue the invoice with the correct VAT.

Tip: Detailed information about the client, such as an international VAT nr, can usually be found in the Impressum on their website.

Name of the client

Enter the name of the client - either the name of the private person or the name of the business. Please use the exact legal name of the client, e.g. Client GmbH, XYZ e.V.

Please make sure not to create double clients, if they already exist in the database. You will be shown alternative to choose from.

New client

Type of client

Choose option ▼

Name of the client

Client Abc

Probably, this client is already in our database. Please check and add the existing client or continue creating new one

Client ABC e.V., Berlin



You can further specify a **contact person** within the company in the next step, when you get to the order creation. The contact person must always be specified for a specific order and may vary from order to order.

Additional Invoice e-mail

You can enter here a general e-mail address to which the invoices should normally go within the company, e.g. the accounting department. However, this is not a mandatory field. You will be prompted to enter an e-mail address for the invoice at the latest when you create the order, under 'Contact person'. If the invoice should be sent to two e-mail addresses, you can enter two different e-mail addresses in the 'Additional Invoice e-mail' and 'Contact person' fields.

1. New Client

Client ABC e.V., Berlin

Country

Choose option

Postal code

City

Street

Number

Addition

Cost centre

☒ Additional Invoice email

Language

Choose option

Submit

2. Add order

Add order

Client

[Request changes](#)

Client name

Test GmbH

Type

Association or foundation with
VAT number

Additional Invoice email

rechnungen@test.de

Language

DE

Address

Country

Street

Teststraße

Country

Germany

Number

99

Postal code

12345

City

Berlin

Contact person

Name

Email

Country/Postal code/City/Street/Number/Addition

Enter the client's place of business or residence, i.e. country, postal code, city, street and house number, as well as an address suffix if necessary.

Language

You can specify the client's preferred language here. This helps us in case we need to communicate directly with the client. The automated e-mails from the portal are always bilingual: German and English.

Changing client details

You can find an overview of all your clients in the 'Clients' section in the menu on the left. There you can see all clients with whom you have at least one active order. You can view the client data by double clicking on it. If you want to make an adjustment of data, please click on 'Request changes' in the client detail view. Smart will process your change request as soon as possible.

Smart

Orders ▾ Expenses ▾

Member MZ ▾

Orders

Clients

Invoices

Client ABC e.V.

Client name

Client ABC e.V.

Type

Association or foundation without VAT number

Language

EN

Address

Street

Teststr.

Number

80

Country

Country

Germany

Postal code

12347

City

Berlin

Request changes