

Order and invoice status

Understand, what is happening with the order

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Check order status

What happens with the order

After creating the order, it will be sent to Smart for confirmation. Here, we will take a closer look at the order and contact you if we have any questions or comments. If your order still needs to be confirmed by the client, it will be sent directly to them after Smart's confirmation. Once the client confirms the order, it becomes "active". Seven days before the planned billing date, you will have the opportunity to request changes to the invoice draft. You can see where your order is currently located in the orders list or based on the status in your dashboard.

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Status of orders

Draft

You can save your order as a draft and edit it at a later time before submitting it. Drafts are not yet visible to the Member Support Team.

Smart Confirmation

The order is being reviewed by Smart and will be released for invoicing or client confirmation. We aim to process orders on weekdays within 24 hours.

Client Confirmation

The order has been sent to the client via email with a link to the client confirmation page. The client can confirm the order as long as the validity of the offer in the order is specified. We recommend specifying at least a few days or a week for confirmation.

If you have selected the option to **skip client confirmation** during order creation, the order will be activated immediately after Smart's confirmation. This function can be used, for example, if another confirmation/contract is already available (please upload corresponding proof during order creation). If no other confirmation is provided by the client, your order will not be subject to **payment guarantee**.

Active

The order has been confirmed by Smart and, if applicable, by the client, and is ready for invoicing. 7 days before the planned invoice date, a draft invoice will be automatically generated and can be reviewed by you at this step. You will be notified by email about this. If you have no changes to request, we will issue the invoices to the clients on the invoice date, and you do not need to take any further action.

Cancelling confirmation

Active orders can be cancelled in the order preview. Smart will then review the cancellation request, and any planned or issued invoices will also be cancelled by Smart. Please provide a detailed reason for the cancellation request.

Rejected

These are orders that have been rejected or not confirmed in time by the client or Smart.

Please note: Orders that have not been confirmed by the client within the "offer valid until" date will end up in this status after the "Offer valid until" date has expired. Therefore, please regularly check whether your orders have been confirmed by the clients in a timely manner. If the order ends up in "Rejected" status and should still be invoiced, it can be duplicated and sent back to Smart for confirmation.

A rejected order should be cancelled? Please go to the tab invoices in the left menu. Under invoice draft you can find the rejected order. Use the button 'Ask for changes' to let Smart know that the invoice should be cancelled. Please note, this is a temporary solution. We are working on a smoother process!

Completed

For orders with this status, invoicing and payment have already been completed, and the service period has ended. **These are therefore active orders whose service period and invoicing have been completed.**

You can complete the order yourself to remove it from the active orders and close it so that it no longer appears under the active orders. You will be informed by email when the order can be completed. In the portal, you can find this option by double-clicking on the active order and

pressing the "Complete" button in the upper right corner.

Check invoice status

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Issued: these invoices have already been sent to the client and are waiting for payment.

Drafts: Here you can find drafts of the invoices that are automatically generated in the portal 7 days prior to the invoice date (based on your order). As soon as the draft is ready, you will receive a notification per e-mail. At this point you can still request changes to the invoice. We will also adjust your budget overview, if necessary. Moreover, you can send the invoice yourself to the client via "Save and send", for example if the invoice is urgent. If you do not request any changes and leave the draft as is, the invoice will be sent by us on the scheduled invoice date.

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Awaiting for update: these are the draft invoices that will be adjusted again by Smart at your request. As soon as they are processed, they change the status to "Invoiced".

Disputed: These are invoices that have been disputed by your clients. We will consult you about the needed changes and cancel the invoice if necessary.

Cancelled: These are invoices that have been cancelled. The client will receive a receipt of the cancellation of the invoice per e-mail. If a payment has already been done, it will be refunded by Smart to the client.

Paid: These invoices have been paid in full by the client.

All e-mail templates that clients receive from Smart in the process are listed in the next chapter.