

Creating orders

Create a new order as soon as you want to realize an order with your clients. You have the possibility to send orders for confirmation to clients and thus keep a good overview of your orders and their status. An order is the basis for invoicing. Please fill out an order for each project or service for which Smart should issue an invoice.

To do this, please click on the +New order button at the top right of the dashboard. You can access the order view in various ways:

Dashboard

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Menu - Orders

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When creating an order, please pay close attention to the input of data, such as the order and service description, as they will be taken over exactly for invoicing to the clients. In the next step, in the status of Smart Confirmation, we will review the order and make minor adjustments if necessary. We will not make any changes that affect the content of your orders and agreements with clients (scope of services or amount of fees).

Below we will guide you through all the steps of order creation

Client

Type the first 3 letters of the client to select from the client database or create a new client. If you haven't done this step yet, please go to the chapter '[Adding a new client](#)' in this tutorial.

Contact person

The contact person is linked to the individual order and must therefore be entered for each new order, even if the client has already been created in the database. You can send different orders with the same client to different contact persons.

The contact person is only visible to you and does not appear publicly in the client profile. The contact person receives all e-mails and invoices related to the order (order confirmation, invoices, cancellation). To be sure who is the contact person for the order confirmation, there is the possibility to enter an e-mail address here.

In the client profile you can specify another e-mail address to which all invoices and cancellation invoices will also be sent (see chapter '[Adding a new client](#) - e-mail for invoice'). The e-mail addresses of the contact person and the invoice address can also be the same. In such case only one e-mail will be sent. If no additional e-mail address for invoices is specified under client details, the contact person given in the order will receive the invoice.

Sector (Activities)

In the next step, please select the sector according to the service you provide.

Sector (Activities)

Choose option

- Business consultancy and marketing**
- Care professions
- Cleaning
- Delivery service
- Education (Bildungswerk)
- Education (cooperative)
- IT and software
- Other
- Performing arts and music
- Technical support for events and event organization
- Tour guides
- Visual art and graphic design
- Writing, translating, interpreting

Order details - your service

Place of service

Please select the place of service from the EU-Zone, Germany or Other.

Based on the parameters 'Sector /Activity' and 'Place of service' as well as the client data, the correct VAT rate for your order will be calculated automatically.

Project name

This field will appear on the invoice in the header and is meant for a short text such as a specific project number or an abbreviation that helps you and your clients to recognise the order fastly. Please keep information short as the detailed description in the order should be

written in "Description of order"

Please note that your name will not appear on the invoice. If it is important for you, please write your name either under **Project name** or in the **Description of order**.

Special Agreement

This is not a mandatory field. Here, you can describe specific conditions with clients, if they are to be agreed upon.

Description of order

This is the field where the description of your service is entered. Example: Teaching activity for Event X. In this field please enter text only, no tables etc., as these cannot be displayed well on the invoice. For detailed service overview please use the function 'Add new item' or 'Add file'.

Additional documents such as timesheets or other details can be sent to the client via the portal in the course of the [client confirmation](#).

Please note: Documents sent in the course of client confirmation are not visible anymore after the order has been confirmed, nor are they sent again with the invoice. They should therefore be downloaded if necessary.

The client will receive an automatic e-mail with the invoice as a PDF-file (the exact e-mail templates sent from the portal can be found in the chapter [Communication with clients](#)). You will receive the invoice in cc and can then forward the additional documents to your client yourself, if necessary.

Add new item

Here you can indicate specific services that belong to one order and choose between different units (days / lump sums / hours / months / weeks and other units), which will be added together and listed on the order and later the invoice, as seen below.

Tip: If you have negotiated the total gross amount and want to calculate your net to enter in the portal, you can use [the input tax calculator](#) online.

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Currency

Currently it is possible to create invoices in the following currencies:
EUR, USD, CAD, PLN, GBP, CZK, CHF, AUD, DKK, JPY, SEK.

If your client would like to receive an invoice in another currency, please contact our member support team.

Service period

Please indicate when exactly the service will be provided. The service period also defines when the order can be completed. Finished orders, for which the service period lies in the past and for which invoicing has taken place can be completed by the member manually (go to [Check order status](#) for further instructions).

Client confirmation

Before the invoice is issued to your client, your order can first be sent to them for confirmation. This is a recommended option, especially for clients within the EU, as we can offer [payment guarantee](#) for these orders, as long as they are confirmed.

If you choose the option **Send order to client confirmation**, an e-mail with the confirmation link will be sent to your client. At this point they can still request changes, confirm or reject the order. This document is not an invoice!

Service period

From ⓘ

To ⓘ

Client confirmation possible until ⓘ

Client confirmation ⓘ

Choose option ▼

Send order to client confirmation

Skip client confirmation

Skip client confirmation and create an invoice

Use this option if you want to skip the confirmation by the client and go directly to invoicing. Please select an appropriate reason for skipping.

Please note: If there is no other confirmation of the order from your client, e.g. a separate agreement that you can upload in the portal, the order will be processed without payment guarantee.

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Offer valid until

Please set a deadline until when the clients can confirm your order. After the deadline, the order will change its status to "Rejected". You will be notified per e-mail 3 days before the end of the deadline, so you can get in touch with your clients.

Please note that even if you skipped the client confirmation, the system will still require you to fill out the 'Client confirmation possible until' field. Just enter a random date; it won't affect the selections you made.

Payments

Now you can indicate the mode of payment, the billing date and when the payment is due. Please note that this information is especially important, as it influences the timing of invoicing and reminders.

Mode of payment

After completion

Please note that you cannot receive [payment guarantee](#) with this payment mode.

Installments

The payment of your order can be divided into up to three invoices. You can specify when particular installments should be invoiced.

Payments

Mode of payment ⓘ

Installments ▾

Payment due on ⓘ

14 days ▾

The amount of invoices ⓘ

3 ▾

Invoice 1 ⓘ

500

Invoice date ⓘ

01/05/2024



Invoice 2 ⓘ

500

Invoice date ⓘ

01/06/2024



Invoice 3 ⓘ

500

Invoice date ⓘ

01/07/2024



Recurrent payments

Recurring orders or frame contracts refer to the same service that is invoiced on a regular basis. If the invoice for the same amount should always be issued at a certain time, you can specify this as follows:

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Comment

You can leave a comment for the Smart Advisors' Team here. It will be only visible for us and not for the client.

Save as draft or save and submit

Now the order can be sent directly to the Smart Team for confirmation or to the client for confirmation. You can also save it as a draft and edit it later. Drafts are not visible for the Smart team.

Duplicating orders

Orders in any status can be easily duplicated, which is convenient for example for frame contracts on call (with variables when it comes to amounts and invoicing date). By duplicating an order, you

save some time entering the data for a similar order. Be sure to double check if all fields are correctly specified for your new order, especially: service period, payment type and invoice date.

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