Create customer

Create new customers for your own orders in the Smart Portal.

- Create customer

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Add a new customer in the portal

You can add new customers to the portal yourself as soon as you create an order with a new customer. If customers are not yet registered in the database, this will happen in this step.

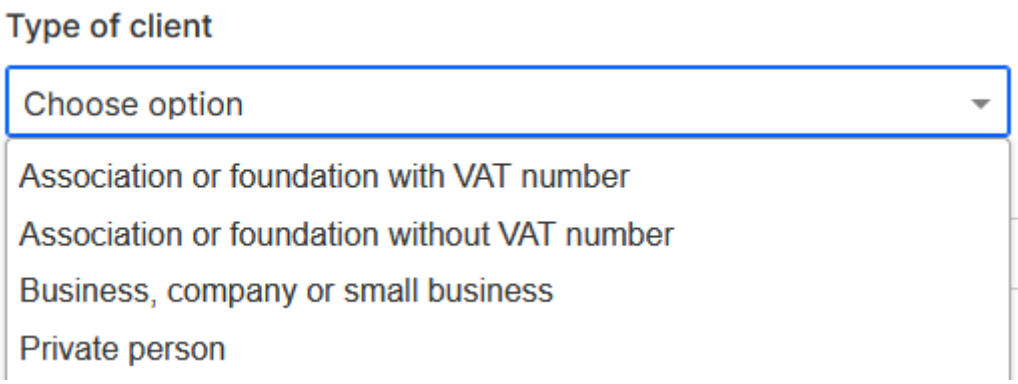
> Please note that all customers created in the database can be seen by all members after entering the first three letters. If the customer with a similar name already exists in the database, you will be informed of this and can then select this customer. Please do not enter the customer twice in the database.

Customer details

The customer is the company/enterprise/association/person with whom you have agreed the order. To do this, we need information about the customer, which you must create if they are not yet registered in the portal.

Type of customer

We need this information to calculate the correct VAT rate. Here you can choose from different options.



A distinction must be made between business customers with or without the international VAT number in the EU area. Please always provide us with the customer's international VAT number so that we can verify it and issue the invoice with the correct VAT rate.

> Tip: You can usually find detailed information about the customer, such as the international VAT number, in the legal notice of their website.

Customer name

Enter the name of the customer here - either the name of the private individual or the name of the business customer. Please use the exact name of the company as the customer name (as in the imprint), e.g. ABC GmbH, XYZ e.V.

Please make sure that you do not save customers that have already been created.

You can enter a contact person within the company in the next step when you get to order creation. The contact person must always be specified for a specific order and cannot be viewed by other Smart users.

UID number

A VAT number must be provided for companies in the EU. We do not need a UID number for

- domestic companies if the invoice amount remains below € 10,000,
- Associations without a UID number,
- private individuals.

For foreign companies outside the EU, proof of entrepreneurship is required if the **reverse charge** regulation is to be used. The Smart Team provides information on this.

E-mail for invoice

You can enter a general e-mail address here to which the invoice should be sent within the company. However, this is not a mandatory field. You will be asked to enter an e-mail address for the invoice in the Contact person field when you create the order at the latest. If the invoice is to be sent to two e-mail addresses, you can enter two different e-mail addresses in the 'E-mail for invoice' and 'Contact person' fields.

Language

You can specify the customer's preferred language here. This helps us in the event of direct contact with customers. The automated emails from the portal are always bilingual: German and English.

Data changes

You have an overview of all your customers in the 'Customers' section in the menu on the left. There you can see all customers with whom you have at least one active order. You can view the customer data by double-clicking. If you would like to make a change to the data, please click on Request changes in the customer detail view. Our advisory team will process your change request as quickly as possible.