Create order

Create a new order in the portal

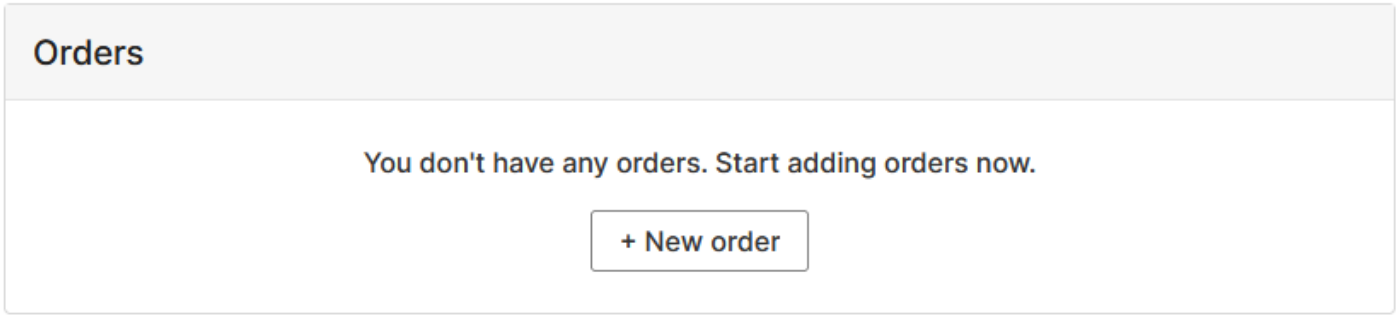
- Create a new order in the portal
- Check order status
- Service contract (Werkvertrag)
- Confirm customer order

Create a new order in the portal

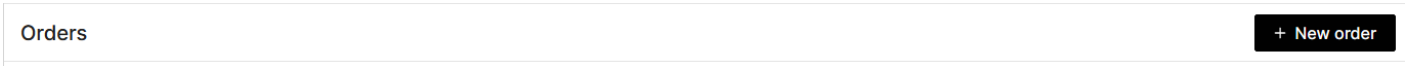
Create a new order as soon as you want to realize an order with your customers. You have the option to send orders to customers for confirmation and thus keep a good overview of your orders and their status. An order is the basis for invoicing. Please fill out an order for each project or service for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

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

Dashboard

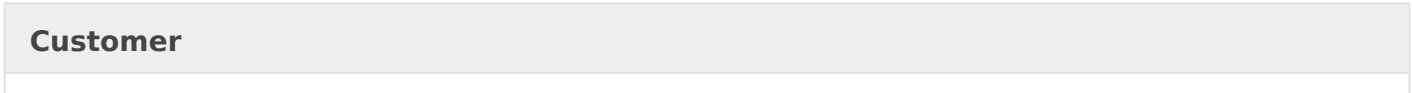


Order-Section



> When you create an order, please pay close attention to the data you enter, such as the order and service description, as these are used exactly for invoicing and communication with the customer. In the next step, during the smart confirmation, we will check the order. If necessary, we will make minor adjustments and, of course, will not make any changes that affect the content of your orders and agreements with customers (service content or amounts).

We will guide you through all the steps of order creation here:



Type the first 3 letters of the customer to select from the customer database or create a new customer. If you have not yet done this step, please go to the previous chapter **Create customers** in this guide.

Contact person for customer

The contact person is always linked to the order and must therefore always be entered, even if the customer has already been created. The contact person is only visible to you and does not appear in the database.

You can also enter two e-mail addresses to which the invoice should be sent. Once in the contact person field and once under the customer's basic data (see previous chapter 'Create customer - email for invoice'). The e-mail addresses can also be the same. In this case, only one e-mail is sent.

Sector (activity)

In the next step, please select the **sector** and the **appropriate activity** for your job. You can find further information in the job descriptions.

Order

Place of performance
Please choose between EU area, Austria and third country (non-EU country).

> The correct VAT rate for your order will be calculated based on the parameters 'Activity' and 'Place of performance' as well as the customer data.

Project name
This is a text field that appears on the invoice and provides space for a project number or an abbreviation, for example. Please keep the information short and describe details of the services in the "Description of the order" field.

> Please note: Your name will not appear on the invoice. If it is important that your name appears on the invoice, please write your name either under the project name or the description of the order.

Special agreement
This is not a mandatory field. Here you can describe special conditions with customers, if these

are to be contractually agreed.

Description of the order
This is the field in which the description of your service is entered. Example: Teaching activity for event X. Please only enter text here and no tables or similar, as these cannot be displayed well. For a detailed overview of your work, please use the 'New work type' fields or add an attachment.

Additional documents such as timesheets or other details can be sent to the customer via the portal as part of the order confirmation.

Add new service type
Here you can specify several services that belong to one order and choose between different units (days / flat rates / hours / months / weeks and other units), which are added together and listed on the invoice.

Performance period
When does the order take place? The performance period also defines when the order can be completed. Orders whose performance period is in the past and for which an invoice has been issued can be completed.

Currency
It is currently possible to create invoices in the following currencies:

EUR, USD, CAD, PLN, GBP, CZK, CHF, AUD, DKK, JPY, SEK.

If your customer would like the invoice in a different currency, please contact our advisory team.

Offer valid until
Define until when customers can confirm your order. After the deadline, the order will change to "Rejected" status. Please check regularly whether your customers have confirmed their orders in good time.

Skip the customer's confirmation and go straight to invoicing
This function allows you to skip the customer confirmation and go straight to invoicing. Please select a suitable reason for skipping.

> Please note: If there is no other confirmation from the customer, the order will not receive a payment guarantee and therefore does not count towards the available budget.

Payment

The payment type, invoicing date and payment deadline are defined here. This data is particularly important as it influences the timing of invoicing and reminders.

Recurring orders

Recurring orders or framework agreements refer to the same service that is invoiced regularly. If the invoice for the same amount should always be issued at a specific time, you can specify this as in the example below. You will receive a notification 7 days before the planned invoicing date and can adjust the draft invoice (e.g. amount).

Contract for work

If the order has a net value of more than 6000 euros, a work contract is automatically created with the details from the order. For orders with lower sums, confirmation of the order by the customer is sufficient. If, for example, rights of use are to be regulated for a lower sum, this can be selected in the order.

Details on the rights regulations can be found in the chapter on contracts for work and services.

Duplicate order

Orders in any status can be easily duplicated, which is practical for call-off framework agreements, for example. This saves you some time entering the data for a similar order. All fields should be checked again, especially the service period, payment type and invoicing date.

Leave a comment for advisors

Internal comments can be left in the comments field, which are only sent to the advising team.

Signed orders

Orders, contracts or other documents already signed by customers confirming the collaboration can be uploaded here. These documents can only be viewed by the Smart team.

Save as draft or send

The order can now be sent directly to Smart Confirmation or Customer Confirmation. You can also save the order as a draft and edit it later. Drafts are not visible to the Smart team.

The Smart team checks all orders before they are sent to the customer for confirmation or go directly to invoicing and will contact you if there are any queries.

Cancel order

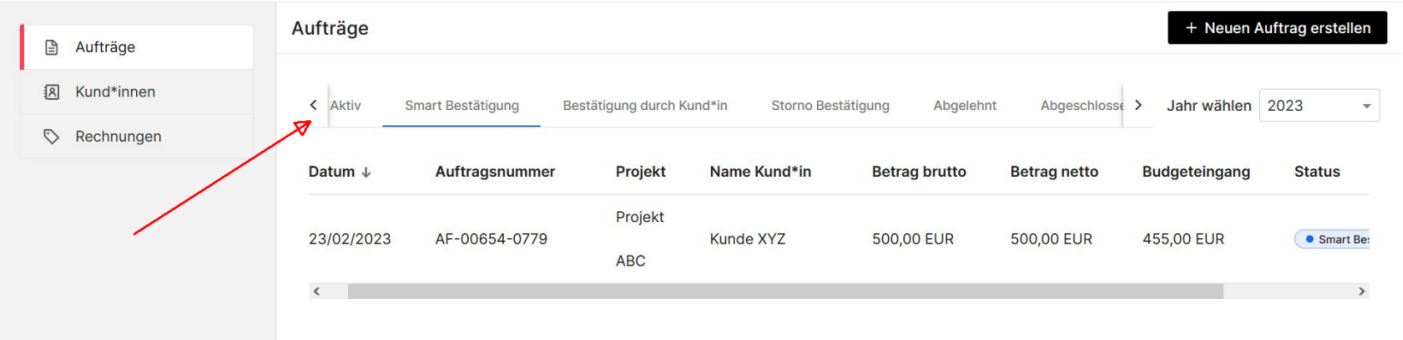
> Please note: When canceling orders, invoices that have already been issued or planned are not automatically canceled.

You have the option of canceling orders that have already been confirmed. In this case, your budget will be adjusted and the order will be canceled. Please inform the advisory team if invoices that have already been issued are also to be canceled. You can use the reason field for canceling the order. We may contact you if it is not clear when the invoices should be canceled or no longer issued in the future.

Check order status

What happens to your order?

After you have created the order, it will be sent to Smart for confirmation. Here we will take another close look at the order and contact you if we have any questions or comments. If your order still needs to be confirmed by the customer, it will be sent directly to the customer after Smart confirmation. As soon as the customer confirms the order, it is "Active". Seven days before the planned invoicing date, you have another opportunity to request changes to the draft invoice. You can see where your order is currently located in the order list or based on the status in the dashboard.



Status of your order briefly explained

Draft - You can save your order as a draft and edit it later before submitting it. The drafts are not yet visible to the member advisors.

Smart confirmation - the order is being checked by Smart and will be released for invoicing or customer confirmation. We try to process orders within 48 hours on working days.

Confirmation by customer - the order has been sent to the customer by email from the system. The customer can confirm the order for as long as the validity of the offer is specified in the order. We recommend specifying at least a few days or a week for the confirmation.

> If you clicked the **Skip customer confirmation** option when creating the order, the order will become active immediately after Smart has confirmed it. This function can be used, for example, if the order is already in the past or another confirmation/contract already exists (please upload the relevant proof when creating the order). **If there is no other confirmation from the customer, your order will not receive a payment guarantee.**

Active - The order has been confirmed by Smart and, if applicable, the customer and is ready for invoicing. A draft invoice is automatically created 7 days before the planned invoicing date and can be checked again by you in this step. You will be notified by e-mail. If you have no changes to request, we will issue the invoices to the customers on the invoice date. In this case, you do not need to take any further action.

Cancellation confirmation - Active orders can be canceled in the order view. This will then be checked by Smart and any corresponding planned or issued invoices will also be canceled by Smart. Please give detailed reasons for the request to cancel the order.

Rejected - These are orders that have been rejected by the customer or Smart.

> Caution: Orders that have not been confirmed by the customer end up in this status after the "Offer valid until" date has expired. Therefore, please check regularly whether your orders have been confirmed by the customer in good time. If the order ends up in the "Rejected" status and is still billed, it can be duplicated and sent to Smart again for confirmation.

Completed - For orders with this status, invoicing and payment have already taken place and the performance period has been completed. These are therefore active orders whose performance period and invoicing have been completed.

You can complete the order yourself to remove it from the active orders and end it so that it no longer appears under the active orders. You will be informed by e-mail as soon as the order can be completed. You will find this option in the portal if you double-click on the active order and click on the "Complete" button in the top right-hand corner.

Service contract (Werkvertrag)

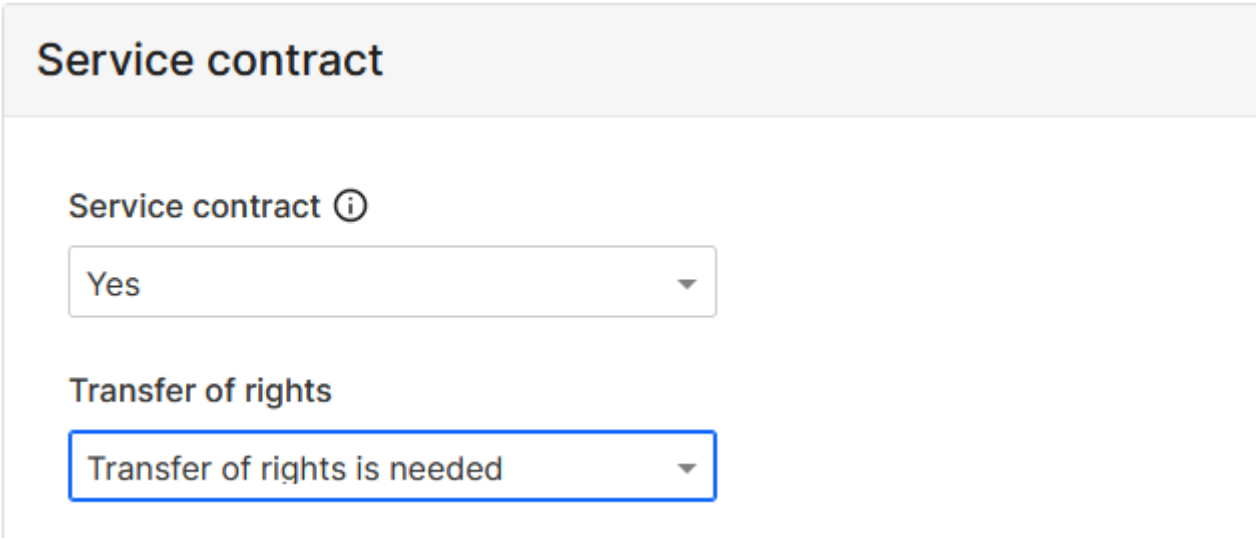
How do you fill out the information in the portal?

The **service contract** is generally required if one of the following reasons applies:

- The net order amount exceeds € 6,000
- The client insists on a contract for work and services
- Rights of use must be regulated.

If you are the author of a work such as a book, stage design, software code, etc., the copyright for this work belongs to you. In the event of your death, the copyright passes to your heirs. The copyright itself is not transferable between living persons; only rights of use can be granted. These or the relevant details are agreed contractually.

Transfer of rights



Which rights are transferred?

At this point, you can select whether only the rights that are absolutely necessary for the fulfilment of the order should be transferred or whether all types of exploitation should be permitted. If you want to restrict the types of exploitation, you can select "For the following types". There will be a selection of types.

Extent of the transfer

You can transfer the right of use **exclusively**, which means that the client has the sole right of use and you cannot transfer the same right of use to another person or company. You yourself can then no longer use the work freely.
(non
If you do not transfer the right of use exclusively, you can transfer it to other clients (**non-exclusively**).

Time restriction

Depending on the agreement, the following time restrictions are possible:

Unlimited in time - there is no time limit, such transfers of rights of use are generally terminable, with an appropriate notice period (3-12 months).

For a term of protection - the term of protection begins with the creation of the work and ends 70 years after the death of the author. The agreement would therefore run until 70 years after death and cannot be terminated.

For a limited period - the rights can also be transferred for a limited period, usually for one year, three years, five years or up to a specific date. However, any duration can be agreed. At the end of the license period, it is possible to extend the term.

Territorial validity

Rights can be transferred for worldwide use or only for certain countries/continents. If the rights for a book are transferred exclusively for Germany, for example, you would still have the option of concluding a contract for use in Italy. As a rule, rights are transferred for certain territories in which the rights acquirer can also exploit the rights (due to their infrastructure). If the work is made available online, this is usually a worldwide right of use.

Transferability of rights

May the client also transfer the rights of use to third parties? Or is the use directly limited to the client?

Attribution

It can also be contractually stipulated whether and with which name the author must be named in connection with the work. There are four options for this, two of which include a picture and biographical information and two without. An artist's name can then be given, or the name with which the user is registered on the portal.

Extension / Buyout

Here it is possible to agree an extension of the transfer of rights of use for a fee in the contract. A sum and the currency can be entered for this purpose.

Confirm customer order

If the order is entered by the customer, it must be confirmed by the user before it is processed by Smart.

There are two ways to find these orders. Via the dashboard or in the orders.

> The order can be opened by double-clicking on it. Under the heading "Payment", you can select whether the order should be carried out independently on a fee basis (credit note) or whether you want to enter into an employment relationship with Smart (employment). The Smart team will inform you about this. If the "How do you want to receive payments?" field is grayed out, this means that a selection is not possible for legal reasons.

Finally, the order must be **confirmed or rejected** in this form. If you reject the order, please leave a comment. This information will also be sent to the customer.