The order form for customers

Create a new order

Orders can be entered directly via the dashboard.

Alternatively you can go to "Orders" and click "New Order" there.

Order step by step

User

To begin with, the user with whom the order has been agreed must be selected. To do this, the name must be entered in the User field. Once a certain number of characters have been entered, the system will suggest one or more names. You must then select from these.

It is possible that several users have the same name. In this case, please contact us, as it is not possible for customers to view or find out any personal data other than first names and surnames.

Cost center

Even if a cost center is specified in the customer data, a different cost center can be specified here for this order. The information from the order form is used for invoicing unless the field is left blank.

Contact person

The contact person's details for this order are important. Any queries about the order are sent to the contact person and this person receives the invoice by email, even if a separate email for sending invoices has been created in the customer data.

Sector (activity)

The next step is to select the sector and the appropriate activity for the job. More detailed information can be found in the **job profiles.**

Order

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

> The correct VAT rate for the order is 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. It is intended as brief information. Details of the service can be entered in the "Description of order" field.

> Please note: The name of the user is not noted on the invoice. If it is important that they appear by name on the invoice, then the name must be stated either under the **project name** or **description of the order**.

Special agreement
This is not a mandatory field. Special conditions with customers can be described here if these are to be contractually agreed.

Order description
This is the field in which the description of the service is entered. Example: Teaching activity for event X. Only text and no tables or similar should be entered here, as these cannot be displayed well. For a detailed overview of services, please use the 'New service 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.

Calculation of the order amount
Total net amount (100%) - Smart fee (10%) = Budget receipt for user (90%)

If you want to extrapolate from the budget receipt to the net order total, use this procedure:

Budget receipt / 90 * 100

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 are automatically completed.

Offer valid until
This defines the deadline by which users can confirm the order. After the deadline, the order changes to the status "Rejected". We ask you to check regularly whether the orders have been confirmed in time.

> Long confirmation periods can be selected, but this may mean that some orders can no longer be accepted by Smart. We therefore ask you to set the confirmation before the start of the service period in order to ensure a smooth process and avoid disadvantages for users.

Payment

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

Recurring orders

Recurring orders or framework agreements relate to the same service that is invoiced regularly. If the invoice for the same amount should always be issued at a specific time, this can be specified as in the example below.

Contract for work

If the order is for a net sum of more than EUR 6000, a contract for work and services is automatically created with the details from the order. 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. All fields should be checked again, especially the performance period, payment type and invoicing date.

Save as draft or send

The order can now be sent directly for user confirmation. The order can also be saved as a draft and edited later. Drafts are not visible to users or the Smart Team.

The Smart Team checks all orders before they are invoiced and will contact you if there are any queries.

Canceling an order

If orders are to be canceled, this must either be requested by the user or the advisory team must be informed.

> ATTENTION: Certain orders cannot be entered via the customer form. Cases in which employment by Smart would be necessary due to the activity cannot be entered or accepted if the performance period is in the past.

Revision #3
Created 2024-08-28 11:29:46 UTC by Simay Zwerger
Updated 2024-08-28 12:09:53 UTC by Simay Zwerger