SmoovOps User Documentation

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Introduction

SmoovOps Documentation

Welcome to SmoovOps — the operations platform built for self-employed professionals and small teams who want to keep their business running smoothly, all from one place.

What is SmoovOps?

SmoovOps brings together everything you need to manage your client relationships and business operations: contracts, documents, payments, partners, and your product catalogue — connected, searchable, and always up to date.

Instead of juggling spreadsheets, email threads, and separate tools, SmoovOps gives you a single workspace to track what you have agreed, what you have delivered, and what you are owed.

What can you do with SmoovOps?

- **Manage contracts** — keep track of all your agreements, their status, duration, and value, with optional auto-renewal and recurring billing
- **Create and send documents** — generate itemised documents linked to your contracts and partners
- **Track payments** — record incoming and outgoing payments, including ones SmoovOps generates automatically from a contract's billing cycle, reconcile what's due against your actual bank activity, and see what is still outstanding
- **Organise customers and vendors** — maintain a contact book of everyone you work with
- **Build a product catalogue** — store the services and goods you offer
- **Attach files** — store documents alongside your contracts and records
- **Keep notes and reminders** — attach notes or due-dated reminders to any partner, contract, or payment, get emailed before something falls due, and see everything that's overdue at a glance
- **Monitor your business at a glance** — the dashboard gives you a live overview of activity and financial flow

Plans

SmoovOps offers three plans. All plans let a small team get started immediately with the core features. As your needs grow, you can upgrade to unlock more capacity and automation.

Plan comparison

Feature	Free	Starter	Pro
Users	2	5, billed per user	Multiple, billed per user
Maximum contracts	20	100	Unlimited
Document storage	—	10 GB	100 GB
Templates	Termination + Notice	additional Offer + Invoice	additional custom templates
Import & Export	✓	✓	✓
Automation with API	—	✓	✓

Feature	Free	Starter	Pro
AI-assisted data collection	—	—	✓
AI-assisted payments	—	—	✓
Email reminders	✓	✓	✓
Dashboard	Net income only, up to 6 months	Full dashboard, up to 6 months	Full dashboard, up to 6 months (2 years for Contracts Growth)
Price	Free	€10 / month / user	€25 / month / user

Annual billing saves up to 20%. For Starter and Pro, both the monthly and annual price are charged per active user.

Choosing the right plan

Free is a great way to try SmoovOps. You can manage up to 20 contracts, use the termination and notice templates, import or export your data, and bring one teammate along — all at no cost, no credit card required.

Starter suits freelancers and small businesses who need offer and invoice templates in addition to termination and notice, plus 10 GB of file storage and up to 5 team members.

Pro is the full package. Unlimited contracts, as many team members as you need (billed per user), 100 GB of storage, custom templates, AI-assisted data entry, automated email reminders for overdue payments, and up to two years of Contracts Growth history on the Dashboard.

How to read the feature labels in this documentation

Throughout these docs, each section heading that is only available on certain plans shows a badge after the heading title. The badge indicates the minimum plan required for that feature. Sections with no badge are available on all plans, including the Free plan.

Getting Started

This guide walks you through creating your account, setting it up, and taking your first steps in SmoovOps.

Create an account

1. Open the SmoovOps website and click **Sign up** or go directly to the sign-up page.
2. Enter your email address and choose a password.
3. Select the plan you want to start with. You can always upgrade later from your account settings. If you are not sure yet, start with the Free plan — no credit card is needed.
4. Choose between monthly or annual billing. Annual billing saves up to 20% compared to paying month by month.
5. If you have a promo code, enter it in the **Promo code** field and click **Apply**. This is optional — you can leave it blank and sign up normally.
6. Click **Create account** to submit your registration.

Confirm your email address

After signing up, SmoovOps sends a confirmation email to the address you provided. Open the email and enter the six-digit code on the confirmation screen to activate your account. If the email does not arrive within a few minutes, check your spam folder.

Your first login

Once your email is confirmed, sign in with your email and password. You will land on the **Dashboard**, which is your home base in SmoovOps.

Navigating the app

SmoovOps has two main navigation areas:

Top bar — the dark bar at the top of every page. Use it to reach the main sections of the app, access your account, and log out.

Left sidebar — appears on all resource pages when you are logged in. It lists the main modules: Dashboard, Contracts, Documents, Notes, Partners, Payments, and Products. On documentation pages (like the one you are reading now), it shows the documentation table of contents instead.

On a phone or narrow screen, the sidebar is hidden by default. Tap the menu icon (☰) at the top left to open it.

Setting up your workspace

Before you start creating contracts, it helps to add your partners first:

Add your partners — go to Partners and add the clients, customers, or vendors you work with. You will be able to select them later when creating contracts and payments.

Once you have partners, creating a contract is quick: pick the partner, set the dates and value, and save. You can also build up a catalogue of your services and goods under Products, for your own reference.

Switching language or theme

You can change the display language and the colour theme at any time:

1. Click your name or the user icon in the top bar.

2. Choose **Settings**.
3. Switch between **English** and **Deutsch**, or between **Light**, **Dark**, and **System** appearance.

The language setting applies to all labels and interface text in the app. For the theme, you can also skip Settings entirely and just click the sun/moon/half-circle icon in the top bar to cycle through the three options directly — see Light and dark mode for details.

Why SmoovOps

Manage Your Business, All in One Place

Running your own business means juggling clients, agreements, invoices, and payments — usually spread across a spreadsheet, an inbox, and a folder of PDFs. SmoovOps brings all of it into one connected workspace, so you always know who you work with, what you agreed, and what's still outstanding. No more digging through email threads to answer a simple question.

Everything Connected, Nothing Scattered

Partners, contracts, documents, payments, and your product catalogue aren't separate silos in SmoovOps — they're linked. Pick a partner once when you create a contract, and every payment and document you attach to it already knows who it belongs to. Open any partner and you instantly see every contract, document, and payment tied to them. That's the whole point: one source of truth, not five.

Your Client Book, Always at Hand

The **Partners** module is your central contact book — clients you sell to and vendors you buy from, each tagged, searchable, and organised with as many addresses as you need (main office, billing, shipping). Switch between a card-based Grid view and a compact List view, whichever suits how you work, and filter instantly by name or tag.

Contracts That Take Care of Themselves

Contracts are the heart of SmoovOps. Every agreement carries a clear status — Draft, Active, Expired, Cancelled — a start and end date, and a value, so you always know where you stand. Turn on **Auto-renewal** and set a renewal term, and SmoovOps quietly rolls the contract forward for you. Set a **Billing cycle** — Monthly, Quarterly, Yearly — and it generates each period's payment on its own. You just review and confirm.

Payments You Can Trust

Every contract already keeps its own payment record, and recurring payments generate themselves as each one succeeds. **Reconcile** lets you match a whole batch of payments against your actual bank statement in one pass, instead of clicking into each one by hand. Nothing falls through the cracks, and nothing needs to be tracked twice.

Documents and Templates, Ready When You Need Them

Generate offers, invoices, and termination notices straight from a contract — your company details, the partner's address, and your product catalogue merge automatically into a finished, ready-to-send document. Every document stays linked to the contract and partner it belongs to, so your paper trail is always one click away, never a separate hunt.

Start Managing With Confidence

This is what it feels like to run your business from a single place — clients, contracts, documents, and payments, all connected, all current. Explore the full documentation to see everything SmoovOps can do, or jump straight in.

Create your free account — no credit card required, and you can be managing your first contract in minutes.

Automate the Busywork, Focus on What Matters

Typing the same details from an invoice into a form, chasing a renewal date in your head, hoping you remember to follow up on a payment — none of that grows your business. SmoovOps takes the repetitive parts off your plate, so your time goes into the work only you can do.

Let SmoovOps Read Your Documents For You Pro

Drop a file onto SmoovOps — an invoice, a signed agreement, a letter — and it reads it for you in the background: classifying the type, pulling out the name, date, and document number, and linking the right contract and partner once it's confident enough. Every upload moves through a clear pipeline — Pending, Processing, Processed, Needs Review, or Failed — so you always know exactly what still needs a look. Turn on automatic approval and only the uncertain ones land in your queue; turn it off and you review everything yourself. Either way, batches of files don't mean batches of manual work — **Process all** walks you through everything pending, one after another, with Save, Previous, and Next always one click away.

From Upload to Partner or Contract — Automatically Pro

The same intelligence that reads your documents can build your records for you. Upload an invoice from a new supplier and SmoovOps drafts a new **Partner**, pre-filled with their name, type, and address — or recognises them as someone you already work with and offers to link instead of duplicate. Upload a signed agreement and it drafts a **Contract** the same way, complete with a partner suggestion already attached. What used to be ten minutes of typing becomes one click of confirmation.

Payments That Keep Themselves Up to Date

Once a contract has a billing cycle, its payments stop needing you at all — mark one **Succeeded** and SmoovOps creates the next one on schedule, same amount, right due date. On the Pro plan, upload a payment confirmation or forward the email, and SmoovOps extracts the amount, date, and reference for you, ready for a quick review instead of manual entry. And when it's time to true things up against your bank, **Reconcile** matches your bank statement against every open payment automatically, scoring each match by amount, name, and reference so you only have to look at the ones it isn't sure about.

Reminders So Nothing Slips Through

Every contract quietly tracks its own deadlines — an end-date reminder is created the moment you save it, and if Auto-renewal is on, the next one appears the instant you mark the current one done. SmoovOps emails you ahead of time too, using the contract's notice period as the lead — so a renewal or a due payment never arrives as a surprise. A single yellow bell in the sidebar tells you the moment anything, anywhere in your account, is overdue.

Put Automation to Work

Less typing, fewer things to remember, more time for the business itself — that's what automation in SmoovOps is for. See it all in detail in the [full documentation], or experience it for yourself.

[Create your free account] and upload your first document today — see how much SmoovOps can do before you type a single field by hand.

See Your Business Clearly, Decide with Confidence

You can't steer a business you can't see. SmoovOps turns the contracts, payments, and partners you already track into a live picture of where you stand — so decisions come from real numbers, not a gut feeling and a guess.

Your Business, One Glance Away

The Dashboard is the first thing you see when you log in, and it's built to answer the question you actually care about: how is the business doing, right now? Your net income at a glance, the number of active partners and contracts, all in a handful of cards that update as your data does. No digging, no exporting to a spreadsheet first — just open the app.

Watch Your Cash Flow Before It Happens

The **Net Income** chart doesn't just show where your balance has been — it shows where it's going. It plots your running balance for every day in the period you choose, and because it includes payments already scheduled for later, you see a dip or a jump before it actually happens, not after. That's the difference between reacting to a cash crunch and seeing it coming weeks in advance.

Track Your Growth Over Time

The **Contracts Growth** chart shows the number of active contracts at the end of each month, so a trend that's invisible day-to-day — steady growth, a plateau, a slow decline — becomes obvious at a glance. On Pro, stretch the view out to a full two years and watch the shape of your business emerge.

Recent Activity, Right There

Below the charts, your most recently updated contracts and most recently recorded payments sit in their own tables — no need to leave the Dashboard to check what just happened. And if your connection drops for a moment, the tables don't just go blank: a **last known** badge keeps showing your most recent data until the connection is back, so a bad moment of Wi-Fi never means losing sight of your business.

Turn Insight Into Action

Numbers only matter if you can see them clearly enough to act on them — that's exactly what the SmoovOps Dashboard is built for. Read more in the [full documentation](), or see it running on your own data.

[Create your free account]() and get your first look at your business the moment you log in.

Modules

Dashboard

The Dashboard is the first thing you see when you log in. Depending on your plan, it ranges from a single net-income snapshot up to a full picture of partners, contracts, and payment trends.

Selecting the dashboard period Free

How much history the Dashboard shows, and what it covers, depends on your plan:

- **Free** — a **Short / Medium / Long** selector, mapping to 1 / 3 / 6 months (Net income only)
- **Starter** Starter+ — the same **Short / Medium / Long** selector (1 / 3 / 6 months), now applied to both charts
- **Pro** Pro — **Short / Medium / Long**, but Net Income maps to 1 / 3 / 6 months while Contracts Growth maps to the wider 6 / 12 / 24 months

Overview cards

- **Net income (end of period)** — your net cash position at the end of the selected period: your balance at the start of the period, plus payments received, minus payments made, including any payments already scheduled for later in the period
- **Partners** and **Contracts** Starter+ — the total number of partners and vendors, and the number of currently active contracts. On Free, only the Net income card is shown.

Charts

Net Income — an area chart showing your running balance for each day of the selected period, starting from your balance at the beginning of the period and adding or subtracting each day's payments. It covers the whole period, including days still to come — so if a payment is already scheduled for later on, it's reflected in the chart now, not just once the day arrives.

Contracts Growth Starter+ — a bar chart showing the number of active contracts at the end of each month within the selected period, so you can see whether your contract base is growing, shrinking, or holding steady.

Customizing a card or chart

Every overview card and chart has a small gear icon in its top-right corner. Click it to open that widget's own settings:

- **Resource** — which data the widget shows: Partners, Contracts, or Payments. Only the resources your plan already unlocks elsewhere on the Dashboard are offered.
- **Show: Last value / Aggregated** — for a card, **Last value** is the current/most recent number (e.g. how many contracts are active right now); **Aggregated** instead sums up the net change over the selected period (e.g. how many contracts were newly added, or the total net payments received). For a chart, **Last value** plots each period's own change; **Aggregated** turns the chart into a running total instead.
- **Starting point** (only shown for an aggregated chart) — **Continue from before** keeps building on your history, exactly like the default charts; **Start at zero** resets the running total to zero at the beginning of the selected period, so you see only what changed within that period.
- **Time period** — overrides the Dashboard's own Short/Medium/Long switch for this one widget. When set, the widget's heading shows the exact date range it's using instead of following the shared switch.

These settings are saved to your account, not just your browser — they look the same the next time you sign in, on any device.

Latest contracts Starter+

The Dashboard includes a table showing your most recently updated contracts. Each row shows the contract name, its type, the linked partner, and its tags and description. Choose how many rows to show, and click **View** on any row to open that contract.

Latest payments Starter+

A second table below the contracts shows your most recently recorded payments, with the payment name, whether it's a recurring or one-time payment, and the linked contract. Choose how many rows to show, and click **View** to open the payment.

The "last known" indicator

The **Latest contracts** and **Latest payments** tables can keep showing the most recently loaded rows when your connection is slow or temporarily unavailable, marked with a **last known** badge. This tells you the list is accurate as of that time; it updates automatically once the server is reachable again. The summary cards and charts don't use this cache — if they can't load, they show a brief error message instead.

Partners

The Partners module is your central contact book. It stores everyone you work with — clients you sell to, contractors you hire, and suppliers you buy from.

Customers and Vendors

Every entry in the Partners list has a **type**:

- **Customer** — someone you sell to, such as a client
- **Vendor** — someone you buy from or hire, such as a supplier or subcontractor

The type affects how the partner appears in filters and reports, but both types work the same way in all other respects.

Viewing your partners

Go to **Partners** in the left sidebar to see the full list. Each row shows the partner's name, type, email address, and any tags you have applied. Use the search box at the top of the list to filter by name or tag.

Adding a new partner

1. Click **Add partner** (the button at the top right of the Partners page).
2. Fill in the details:
3. **Name** — the person's or company's name (required)
4. **Type** — Customer or Vendor
5. **Description** — optional notes about this contact
6. **Website** — optional link to the partner's website
7. **Logo** — optional; upload an image and SmoovOps resizes it automatically
8. **Tags** — optional labels to help you group and filter (separate multiple tags with commas)
9. Click **Save** to add the partner.

Addresses aren't part of this initial form — add them afterwards from the partner's detail view (see [Managing addresses](#) below).

Website and Logo only ever appear on the partner's detail view — never in the Partners list/grid. On the detail view, the website shows as a clickable link, and the logo appears prominently in the right-hand panel. Selecting a note or reminder replaces the logo there with that note's details; click the **×** in the corner of the note's details (or select nothing) to bring the logo back. Website is included in export/import (see [Import & Export](#) below); Logo, being an image file, is not.

Generating partners from files Pro

Instead of filling in the form by hand, you can upload a file — such as an invoice, letter, or contract you received from someone — and let SmoovOps read the sender's details for you.

1. Go to **Partners** in the left sidebar and click **+ From File(s)**.
2. Above the upload area, check or uncheck **Keep document after generation** to your liking — see [Keeping or discarding the source document](#) below. Your choice is remembered for next time.
3. Drag and drop one or more files onto the upload area, or click **Choose Files** to browse. Any file type is accepted.
4. Each file is processed in the background, the same way document uploads are — see [Uploading and auto-processing documents](#) for what the Pending/Processing/Processed/Needs Review/Failed statuses mean.
5. Once a file is ready, click **Generate Partner** next to it (or click **Generate all** to work through every ready file one after another, with **Save**/**Previous**/**Next** controls at the top, just like reviewing documents).

The review screen pre-fills a new partner's **Name**, **Type**, and **Address** from what was found in the file, flagging any field it wasn't fully confident about. The **Type** defaults based on your plan — private accounts default to Vendor, business accounts default to Customer — but you can always change it. If the file's raw address text couldn't be split into Street/Postal Code/City automatically, it's shown for reference so you can fill those fields in yourself.

If SmoovOps recognises the sender as a partner you already have, it shows a suggestion instead: click **Use this partner** to link to the existing one rather than creating a duplicate, or ignore it and fill in the form to create a new partner anyway.

Generating a partner this way only creates (or links) the **Partner** — it does not yet create a contract, and the document isn't linked to one. That's a separate step; see [Generating contracts from files]() on the Contracts page.

Keeping or discarding the source document Pro

By default, the file you uploaded to generate a partner stays afterwards as a document, linked to the new (or matched existing) partner, and can be found and further processed from the [Documents]() page.

If you don't need it tracked as a document — for example if you're only using the file to quickly create a partner — uncheck **Keep document after generation** above the upload area before generating. With it unchecked, the source document and its uploaded file are deleted as soon as the partner has been generated, whether you created a new partner or linked to an existing one. Your choice is saved in your browser and shared with the same checkbox on the Contracts **+ From File(s)** page, since both generate from the same underlying documents.

Removing unwanted uploads Pro

If you uploaded the wrong file, or a document never finished processing, click **Remove all** next to **Generate all** on the imported-files list, then **Confirm?**. This clears every file still on the list — including ones stuck at Pending, Processing, or Failed, not just ones ready to generate a partner — deleting each document and its uploaded file along with it. It never affects a partner you've already generated from a previously-handled file.

Editing a partner

Click the edit icon next to any partner in the list to open the edit form. Change any fields you need and click **Save**.

Deleting a partner

Open a partner's detail view and click **Delete**. Before you can confirm, SmoovOps checks what's linked to the partner: its contracts, everything linked to those contracts (pending payments, documents, and notes/reminders), plus any documents and notes attached to the partner directly.

- **If any of the partner's contracts is Active**, deletion is blocked outright — a message tells you how many active contracts exist and asks you to cancel or otherwise deactivate them first. No **Confirm?** option is offered in this case.
- **If nothing is linked**, you're simply asked to confirm, same as before.
- **If something is linked** (and no contract is Active), a summary shows how many inactive contracts are involved, together with their combined pending payments and notes/reminders, plus how many documents are linked. Choose one:
- **Also delete the inactive contracts and their pending payments/notes**
- **Keep them, just unlink from this partner**

Documents are always kept and unlinked either way — deleting a partner never deletes a document. Payments that are already settled (Succeeded or Refunded) are always kept too, regardless of your choice. **Confirm?** stays disabled until you've picked one of the two options.

Click **Confirm?** to finish, or **Cancel** to back out without deleting anything. The partner's addresses are removed automatically along with the partner — they aren't a separate record you need to handle yourself.

Deleting a single contract works the same way, just scoped to that one contract's own payments, documents, and notes — see Deleting a contract.

Grid and List view

Use the toggle above the list to switch between **Grid** view (a card per partner) and **List** view (a compact table). Your choice is remembered the next time you visit the page.

Searching and filtering

The search bar at the top of the partners list filters by name in real time as you type. You can also filter by type (Customer / Vendor) using the dropdown next to the search bar.

Using tags to organise partners

Tags are free-form labels you attach to a partner (for example: "priority client", "german market", "subcontractor"). They appear in the partner list and you can filter by them. There is no limit to how many tags you can add per partner.

Managing addresses

Click a partner in the list (or its card, in Grid view) to open its detail view. From there you can add, edit, and remove as many addresses as you need for that partner — for example a main office, a separate billing address, and a shipping address.

Each address has:

- **Usage** — Main, Billing, Shipping, or Other
- **Contact Person** — optional
- **Email** and **Phone** — optional
- **Street**, **Postal Code**, **City**, and **Country**

To add an address: 1. Open the partner's detail view. 2. Under **Addresses**, click **Add Address**. 3. Fill in the fields you need and click **Save**.

To edit or remove an address: use the pencil or trash icon next to it in the address list. Removing an address asks you to confirm first.

Notes and reminders

A partner's detail view also has a **Notes/Reminders** column where you can keep notes and reminders about that partner — for example a preferred delivery window, or a reminder to follow up on a renewal. See the Notes & Reminders page for how notes and reminders work, including the **Notes** page that lists everything across all your partners, contracts, and payments in one place.

Import & Export Free

On all plans, including Free, you can bulk-import and bulk-export your partner list.

To import partners: 1. Click **Import** at the top of the Partners page. 2. Upload a CSV, Excel (.xlsx), or ODS file. The file must include a header row, with columns in this order: Name, Type, Description, Tags, Email, Phone, Street, Postal Code, City, Country, Website. 3. Review the preview and confirm the import.

Duplicate partners: if a row's Name matches a partner you already have (not case-sensitive), SmoovOps asks whether to **merge** the row into that existing partner or **create a separate new partner** with the same name. Merging overwrites only the fields the row actually contains (Name, Type, Description, Tags, address, Website) and always keeps the existing logo and any contracts, documents, payments, or notes already linked to that partner. If a row includes address details, it replaces the partner's existing address rather than adding to it. If your file has several rows that match existing partners, check **Apply to all remaining duplicates** to answer once for all of them instead of one at a time.

To export partners: 1. Click **Export** at the top of the Partners page. 2. Choose your preferred format: CSV, Excel, or ODS. 3. The file downloads to your device immediately.

Export is useful for backups, reporting in a spreadsheet tool, or migrating your data to another system.

Contracts

Contracts are at the heart of SmoovOps. Each contract represents an agreement between you and a partner, with a defined period and value.

Contract statuses

Every contract goes through a lifecycle expressed by its status:

Status	Meaning
Draft	The contract is being prepared and has not yet taken effect.
Active	The contract is in force.
Expired	The contract's end date has passed.
Cancelled	The contract was cancelled before its end date.

You set the status manually. SmoovOps does not change it automatically.

Viewing your contracts

Go to **Contracts** in the left sidebar. The list shows each contract's name, the linked partner, the status, the start and end dates, and the total value. Click a contract to see its full details.

Use the toggle above the list to switch between **Grid** view (a card per contract) and **List** view (a compact table) — your choice is remembered the next time you visit the page.

Creating a contract

1. Click **Add contract** at the top right of the Contracts page.
2. Fill in the required fields:
3. **Name** — a short descriptive title for the contract
4. **Partner** — search for and select the partner this contract is with
5. **Start date** and **End date**
6. **Total value** and **Currency**
7. Optionally add a **Description** and **Tags**.
8. Set the initial status (usually **Draft**).
9. Optionally expand **Advanced options** — see [Advanced options](#) below.
10. Click **Save**.

Generating contracts from files Pro

Instead of filling in the form by hand, you can upload a file — such as a signed agreement or an invoice referencing it — and let SmoovOps read the contract details for you.

1. Go to **Contracts** in the left sidebar and click **+ From File(s)**.
2. Above the upload area, check or uncheck **Keep document after generation** to your liking — see Keeping or discarding the source document below. Your choice is remembered for next time.
3. Drag and drop one or more files onto the upload area, or click **Choose Files** to browse. Any file type is accepted.
4. Each file is processed in the background, the same way document uploads are — see Uploading and auto-processing documents for what the Pending/Processing/Processed/Needs Review/Failed statuses mean.
5. Once a file is ready, click **Generate Contract** next to it (or click **Generate all** to work through every ready file one after another, with **Save**/**Previous**/**Next** controls at the top, just like

reviewing documents).

If SmoovOps recognises the file as belonging to a contract you already have, it shows a suggestion: click **Use this contract** to link the document to the existing contract — its partner comes along automatically — instead of creating a duplicate. New contracts are only ever generated when you don't already have a matching one.

Otherwise, the review screen pre-fills a new contract's **Name**, **Start Date**, **Total Value**, and **Currency** from what was found in the file, ready for you to adjust before saving. Below the contract fields, a **Partner** section handles the partner side:

- If the document already has a partner linked — for example because you generated a partner from this same file first — it's shown already selected.
- Otherwise, if SmoovOps recognises the sender, it suggests one: click **Use this partner** to accept it.
- If neither applies, search for an existing partner, or click **Create a new partner instead** to fill in a small partner form right there (pre-filled the same way generating a partner from a file is), without leaving the Contracts page.

Saving links the document to the resulting contract and partner.

Starting from a specific contract: instead of the general Contracts list, you can also click **+ New Document** on an existing contract's own detail view. This uploads and processes files the same way, but skips the suggestion step and any contract search entirely — every file you upload here is linked straight to that contract once processed, so it can never end up attached to the wrong one. Once every uploaded file has been handled (or if you cancel partway through), you're brought back to that same contract's detail view, where the newly linked document appears in its own documents table — see Documents linked to a contract below.

Keeping or discarding the source document Pro

By default, the file you uploaded to generate a contract stays afterwards as a document, linked to the new (or matched existing) contract, and can be found and further processed from the Documents page.

If you don't need it tracked as a document — for example if you're only using the file to quickly create a contract — uncheck **Keep document after generation** above the upload area before generating. With it unchecked, the source document and its uploaded file are deleted as soon as the contract has been generated, whether you created a new contract or linked to an existing one. Your choice is saved in your browser and shared with the same checkbox on the Partners **+ From File(s)** page, since both generate from the same underlying documents.

Removing unwanted uploads Pro

If you uploaded the wrong file, or a document never finished processing, click **Remove all** next to **Generate all** on the imported-files list, then **Confirm?**. This clears every file still on the list — including ones stuck at Pending, Processing, or Failed, not just ones ready to generate a contract — deleting each document and its uploaded file along with it. It never affects a contract you've already generated from a previously-handled file.

Documents linked to a contract Pro

A contract's detail view also shows a read-only table of every document already linked to it — for example a signed agreement, an invoice, or anything else uploaded or generated through the flows above. It works like the Documents page's own list view (the same columns, search box, and pagination), just filtered to this one contract. Click a row to open that document. This is separate from Attached files below, which stores raw files rather than tracked Document records.

Editing and cancelling a contract

Open a contract and click **Edit** to change any field. To cancel a contract, change its status to **Cancelled** in the edit form.

Deleting a contract

Open a contract's detail view and click **Delete**. Before you can confirm, SmoovOps checks what's linked to the contract: its pending payments, documents, and notes/reminders.

- **If nothing is linked**, you're simply asked to confirm.
- **If something is linked**, a summary shows how many pending payments and notes/reminders are involved, plus how many documents are linked. Choose one:
- **Also delete the pending payments and notes/reminders**
- **Keep them, just unlink from this contract**

Documents are always kept and unlinked either way — deleting a contract never deletes a document; remove one yourself from the Documents page if you don't need it. Payments that are already settled (Succeeded or Refunded) are always kept too, regardless of your choice. **Confirm?** stays disabled until you've picked one of the two options.

Click **Confirm?** to finish, or **Cancel** to back out without deleting anything. Deleting a partner works the same way, scaled up to that partner's contracts — see Deleting a partner.

Advanced options

Every contract form has a collapsed **Advanced options** section. It's entirely optional — a contract with nothing filled in here behaves exactly as described above, with no automation attached. Expand it to configure a contract that renews on its own and bills on a recurring cycle:

Field	What it does
Auto-renewal	Check this if the contract renews itself unless someone actively cancels it, rather than simply ending on its end date.
Renewal term (months)	How many months each renewal cycle lasts. Used together with Auto-renewal to work out when the *next* renewal decision falls due.
Notice period (days)	How many days before a renewal or payment is due you want to be reminded by email. Leave it blank and SmoovOps reminds you 3 days before by default.
Contract type	A category — Service, Framework agreement, License, or Lease — purely for your own organisation and filtering; it doesn't change how the contract behaves.
Billing cycle	How often this contract is paid: One-time, Monthly, Quarterly, or Yearly.
Reminder emails	Who gets this contract's reminder emails — see Overriding reminder emails for one contract below.

See Automatic reminders and payments below for what these fields actually trigger.

Overriding reminder emails for one contract

By default, a contract's reminder emails follow the account-wide setting an owner or admin configures on the Settings page (see Reminder emails). At the bottom of **Advanced options**, the **Reminder emails** field lets you override that for this one contract:

- **Automatic (use account default)** — follows the account-wide setting. This is the default for every contract.

- **Don't send reminder emails for this contract** — this contract's reminders never get emailed to anyone, no matter what the account default is.
- **Send reminder emails to a specific person** — choose one person from your team; this contract's reminder emails go only to them, regardless of the account default.

Everyone can see this field, but only an account **Owner** or **Admin** can change it by default — a regular **User** can only change it if an owner or admin has turned on **Allow team members to override reminder emails per contract** in Reminder emails Settings. Whatever this field is set to, the yellow reminder bell in the navigation bar still shows the reminder to everyone on the team.

Automatic reminders and payments

SmoovOps keeps you from having to remember every contract's renewal date and billing schedule yourself.

Every contract with an end date automatically gets one reminder for that end date, and every contract with a total value automatically gets one payment for that value — you don't need to create these by hand. They show up in the contract's own Notes/Reminders list and Payments list, and on the Notes and Payments pages, just like anything you create manually.

Contracts with Advanced options configured go further:

- If **Auto-renewal** and a **Renewal term** are set, marking the end-date reminder **done** automatically creates the next one — due date advanced by the renewal term — for as long as the contract stays **Active** and Auto-renewal stays checked. Turn off Auto-renewal, or cancel the contract, and no further reminder is created.
- If a **Billing cycle** other than One-time is set, marking the current payment **Succeeded** automatically creates the next one — due date advanced by one billing cycle, same amount — for as long as the contract stays **Active**.
- SmoovOps also emails you when a reminder or payment is coming up, using the contract's **Notice period** as the lead time (or 3 days if you haven't set one). Once a contract is no longer Active, you stop being emailed about it, even if an open reminder or payment is still sitting there.

A contract's detail view shows a preview of the next upcoming renewal decision and the next few upcoming payments, computed from these settings, so you can see what's coming without waiting for the email.

Maximum number of contracts Free

The number of contracts you can create depends on your plan:

- **Free plan** — up to 20 contracts
- **Starter** Starter+ — up to 100 contracts
- **Pro** Pro — unlimited contracts

If you reach your plan's limit, upgrade to create more contracts.

Document templates

SmoovOps can generate ready-to-use documents from a contract. The templates available depend on your plan:

Termination notice Free

Available on all plans. Generates a formal termination notice for the contract. You fill in a few details and SmoovOps produces a ready-to-send document.

Contractual notice Free

Available on all plans, including Free. Generates a standard contractual notice for the partner, covering common scenarios such as change of terms or early renewal.

Offer and invoice templates Starter+

Available from the Starter plan. Generates a formal offer document and a matching invoice based on the contract details, ready for sending to your partner.

Custom templates Pro

Available on the Pro plan. Beyond the four templates above, add and edit as many document templates of your own as you like — no need to contact support. See Managing document templates.

Notes and reminders

Open a contract's detail view to keep notes and reminders about it — for example the reason it was renewed, or a reminder to check in before renewal. See the Notes & Reminders page for how notes and reminders work, including the **Notes** page that lists everything across all your partners, contracts, and payments in one place.

Attached files Starter+

On the Starter and Pro plans, you can upload files to any contract — for example the signed agreement, attachments, or correspondence.

Storage included by plan:

Plan	Storage
Free	No file storage
Starter	10 GB
Pro	100 GB

To attach a file, open a contract and use the **Upload file** button. Files you upload appear in the contract's file list and can be downloaded or deleted at any time.

See the Files page for more details.

Import & Export Free

On all plans, including Free, you can import contracts in bulk from a spreadsheet and export your full contracts list to CSV, Excel, or ODS format.

To import contracts: 1. Click **Import** at the top of the Contracts page. 2. Upload a CSV, Excel, or ODS file. The file must include a header row, with columns in this order: Name, Status, Partner, Start Date, End Date, Payment Amount, Currency, Description, Tags, Contract type, Billing cycle, Auto-renewal, Renewal term (months), Notice period (days). 3. Review the preview and confirm.

If a row's **Partner** column matches the name of exactly one existing partner, the imported contract is linked to it automatically. If it matches none of your partners, or more than one, the contract is still imported but left without a partner link, and a warning lists which rows need linking by hand afterwards.

The last five columns are the same fields as the **Advanced options** section (see Advanced options above); leave any of them blank to skip. **Reminder emails** isn't part of import/export — it's an override tied to a specific team member, and needs to be set up per contract from the contract's own edit form.

To export contracts: 1. Click **Export** at the top of the Contracts page. 2. Choose CSV, Excel, or ODS and the file will download immediately.

Documents

The Documents module lets you create and track the documents connected to your business — contracts, invoices, delivery notes, letters, offers, and receipts. Documents are linked to your contracts and partners, keeping everything connected.

Document statuses

Status	Meaning
Draft	The document is still being prepared or reviewed.
Final	The document is complete and finalised.

Document types

Every document has a type: **Contract**, **Invoice**, **Delivery**, **Letter**, **Offer**, **Receipt**, or **Other**.

Viewing your documents

Go to **Documents** in the left sidebar. Use the toggle above the list to switch between **Grid** and **List** view — your choice is remembered the next time you visit the page. Use the search box to filter by name, document number, partner, type, or status.

Viewing and resizing the document preview

Open any document that has a file attached and its detail page shows your details on the left and a preview of the file on the right.

- Drag the thin vertical divider between the two panels to give either one more room — the panels can also be resized using the arrow keys once the divider has focus (Home and End jump straight to the narrowest and widest settings).
- The preview automatically zooms to fit whatever width you give it, so widening the preview panel makes the document bigger on its own — no separate zoom step needed.
- Use the magnifying-glass buttons above the preview to zoom in or out further from there, or the percentage button between them to reset back to the fitted size. On a small screen, the two panels stack instead and the divider isn't shown.
- Wherever you leave the divider is remembered the next time you open any document's detail page, instead of starting back at an even 50:50 split each time.

Uploading and auto-processing documents Pro

Every document starts from an uploaded file — SmoovOps reads it for you rather than asking you to fill in every field by hand.

1. Click **New Document** at the top of the Documents page.
2. Above the upload area, check or uncheck **Automatically approve documents when extraction confidence is high** to your liking — see [Automatic approval for high-confidence documents](#) below. Your choice is remembered for next time.
3. Drag and drop one or more files onto the upload area, or click **Choose Files** to browse. Any file type is accepted.
4. Each uploaded file creates a new document automatically. SmoovOps reads the file in the background — classifying its type, extracting the name, date, and document number, and, when it's confident enough, linking the matching contract and partner on its own.

While this is happening, each document shows one of the following statuses:

Status	Meaning
Pending	The file has been uploaded and is queued for processing.
Processing	SmoovOps is currently reading the file.
Processed	Processing finished with high confidence and, since automatic approval was switched on, the document was approved without needing your review — though you can still open it to double-check.
Needs Review	Processing finished, but either the confidence on one or more fields was lower, or automatic approval was switched off — take a moment to confirm or correct the fields before relying on the document.
Failed	Something went wrong reading the file. The error is shown next to the document; you'll need to re-upload it.

The Partners and Contracts pages have their own **+ From File(s)** buttons that use this same processing — see Generating partners from files and Generating contracts from files if you're looking to create a partner or contract from an uploaded file rather than a plain document record.

Automatic approval for high-confidence documents Pro

By default, SmoovOps approves a document on its own once every extracted field — type, name, date, and document number — meets its confidence bar, so you only have to review the documents it's actually unsure about.

If you'd rather check every document yourself no matter how confident SmoovOps is, uncheck **Automatically approve documents when extraction confidence is high** above the upload area on the imported-files page. With it unchecked, every uploaded document ends up at **Needs Review**, even at the highest confidence, until you save it from the review screen yourself. Your choice is saved in your browser and applies the next time you upload — from the Documents page as well as the Partners and Contracts **+ From File(s)** pages, since they all process files the same way.

Reviewing an auto-processed document Pro

Once a document reaches **Processed** or **Needs Review**, a **Review** action becomes available — both on the imported-files list and on the document's own detail page.

The review screen shows: - The same fields as the regular document form, pre-filled with SmoovOps's best guess. Any field extracted with low confidence is flagged with a warning next to it. - A **suggested contract** banner when SmoovOps found a likely match but wasn't confident enough to link it automatically — click **Use this contract** to accept the suggestion, or search for a different one yourself. - A read-only panel of additional details found in the file (sender, amount, currency) that aren't stored on the document itself — useful context while you review, though creating a payment from these is a separate step. - The original file alongside the form, fitted to its panel by default with zoom and scroll controls so you can check the extracted data against the source document.

Correct anything that needs it and click **Save** — this confirms the document has been reviewed.

Processing several documents in a row Pro

If you've uploaded a batch of files, you don't have to open and review them one at a time from the list. On the imported-files page, click **Process all** to jump straight into the oldest document that's ready for review. From there, a small toolbar at the top of the review screen lets you cycle through everything still pending:

- **Save** confirms the current document and automatically opens the next one that needs review.
- **Previous** / **Next** let you jump between pending documents manually, in either direction, without saving.
- A position indicator (e.g. "2 of 5 pending") shows how many documents are left.
- The trash icon deletes the document you're currently reviewing — see Removing unwanted documents below.

Once every document has been reviewed, you're returned to the imported-files list, which stays empty until new files are uploaded. Since uploading and reviewing can happen at different times — or even by different people on your team — this list always reflects what's actually still pending, not just what you personally uploaded in your current session.

Removing unwanted documents Pro

If you uploaded the wrong file, or a document never finished processing (or failed), you don't have to review it just to get it off the list.

To remove a single document while reviewing it: click the trash icon at the top of the review screen, next to **Save**/**Previous**/**Next**, then click **Confirm?** to finish. This is available even if it's the only document currently pending.

To remove everything at once: on the imported-files list, click **Remove all** next to **Process all**, then **Confirm?**. This clears every document still on the list — including ones stuck at Pending, Processing, or Failed, not just ones ready for review.

Either way, the uploaded file behind the document is deleted along with it — nothing is left behind in storage. Removing a document only affects that document record; it never deletes a partner or contract you've already created from a reviewed document.

Generating a document from a template

Instead of uploading a file, you can create a document straight from a template — SmoovOps merges your company details, a partner or contract, and (for offers and invoices) your product catalogue into a finished letter or invoice, ready to preview and save.

1. Go to **Documents** and click **Generate**.
2. Under **Template**, choose which template to use.
3. If the template's type is Letter, Offer, or Invoice, a **Contract** picker appears. Search for and select the contract this document is for:
4. Selecting a contract automatically fills in the recipient's name and address from that contract's partner, and removes the recipient fields from the form — you no longer need to type them by hand.
5. If you leave no contract selected, the recipient fields stay in the form for you to fill in manually.
6. For Offer and Invoice templates, a **Line items** section appears. Add a row for each product or service and choose the product and quantity. The Net, one **Tax** subtotal per rate used, and the Total update automatically as you add or change rows.
7. Each row's **Unit price** starts out as the product's price from your catalogue. Whether you can change it depends on your role and a setting an owner or admin controls — see Overriding line-item pricing below.
8. Each row's tax rate comes automatically from that product's own **Tax Rate** (see Tax Rates) — there's nothing to set by hand. If a product has no Tax Rate assigned, its line is treated as 0%.
9. If your lines use more than one tax rate, the generated document shows a separate subtotal for each — for example two lines at 7% and two at 19% produce **Net**, **Tax (7%)**, **Tax (19%)**, and **Total** rows.
10. Fill in the remaining fields declared by the template (these vary by template — an invoice, for example, asks for an invoice number and due date).
11. Optionally add free text in **Additional text** — this appears wherever the template places it (for a letter, between the salutation and the closing).

12. Click **Generate**. A live preview of the finished document appears on the right.
13. From the preview, you can:
14. **Download PDF** — opens the document in a new tab and triggers your browser's print dialog, so you can save it as a PDF or print it directly.
15. **Save** — stores the document in your Documents list, linked to the contract/partner you selected, so you can find it again later, open it, or send it (see Sending a document below).

Just like a document's own detail page (see Viewing and resizing the document preview above), drag the divider between the form and the preview to give either one more room — the preview automatically zooms to fit whatever width you leave it, so widening the panel makes the document bigger with no separate zoom step. This page remembers its own split independently of the detail page's.

Your company's name, logo, website, tax details, and full contact details — including contact name, email, phone, and country — come from your **Company Profile** and its **Main** address (see Managing your company profile).

Letter, Offer, and Invoice templates present themselves as coming from your business, so generating one is only possible once you've filled in at least the **Legal name** in your Company Profile — until then, the Generate page shows a notice linking you to Settings instead of the form. **Other**-type templates don't reference your company details at all and can always be generated, Company Profile or not.

Generating an Invoice from an Offer

Once you've saved an Offer, you can turn it into an Invoice without retyping anything.

1. Open the Offer's detail page.
2. Click **Generate Invoice**.
3. You'll land on the same **Generate** screen as above, but pre-filled: an Invoice template is selected automatically, the contract/partner carries over from the Offer, and the Offer's line items — including each line's own tax rate at the time the Offer was made — are copied in. If a product's Tax Rate has changed since, the copied line still uses the Offer's original rate, not the new one.
4. Fill in the fields the Invoice template needs (such as an invoice number and due date) and any other changes you want to make.
5. Click **Generate**, then **Save** — this creates a brand-new Invoice document; the original Offer is left untouched.

The new Invoice's detail page shows a **Generated from Offer …** note linking back to the Offer it came from.

Whether you can change the copied line items and their pricing depends on your role and a setting an owner or admin controls — see Overriding line-item pricing below. Once an Offer or Invoice has been generated and saved, its line items can no longer be changed at all — only the metadata fields available from **Edit** (see Editing a document).

Overriding line-item pricing

By default, when generating a document with line items, a regular team member can pick products and quantities freely, but a line's **Unit price** always matches the catalogue price, and — when generating an Invoice from an Offer — the copied line items are locked as they were on the Offer.

An account **Owner** or **Admin** can always change unit prices and edit copied line items, on any plan. To let every team member do the same, switch on **Allow team members to override line-item pricing** in Settings — see Invoice and offer pricing.

Managing document templates

Templates are managed on their own page, available to the account **Owner** or **Admin**, on every plan. Which templates you have depends on your plan:

- **Free** — a **Termination Notice** and a **Contractual Notice** template, both editable.
- **Starter** — the same two, plus editable **Offer** and **Invoice** templates.

- **Pro** — the same four, plus the ability to add as many templates of your own as you like.

- Go to **Documents** and click **Manage Templates**.

- Select an existing template to edit it. On the Pro plan, click **New Template** to add one of your own instead — on Free and Starter this button is replaced by a note that upgrading to Pro unlocks adding your own templates.
- Fill in the template's **Name** and **Document Type**.
- Write the template's layout using SmoovOps's restricted Pug-style syntax, split across three sections:
- **Content** — required; the main body of the document.
- **Header** — optional; repeated at the top of the document. Once you've entered a header, or switched on **Show company logo** (see below), choose its **Header visibility**: **All pages**, **First page only**, or **Last page only**.
- **Footer** — optional; repeated at the bottom of the document, with its own **Footer visibility** choice (same three options).

Leaving Header or Footer empty is fine — the document simply has none. 5. Optionally switch on **Show company logo** and choose a **Logo position** (**Top left** or **Top right**). This uses the logo from your [Company Profile] — nothing to upload here. 6. Add the form fields the template needs — each with a name, a label in English and German, a field type, and whether it's required. 7. Click **Validate**. This compiles whichever of Header, Content, and Footer you've filled in, checks them for errors, and shows a live preview using sample data (including your logo, if enabled); fix any errors shown and validate again. 8. Once validation succeeds, choose a **Status** — **Draft** keeps the template hidden from the Generate page; **Published** makes it available there — and click **Save**.

Save is only available once the current Header, Content, and Footer text has been successfully validated. Editing any of them after validating disables Save again until you re-validate — this guarantees a template can't be used unless it's actually been checked.

Resetting a plan-provided template to its original content

The **Termination Notice**, **Contractual Notice**, **Offer**, and **Invoice** templates start out with SmoovOps-provided default content. Editing and saving one of them creates your own copy — from then on, that template shows your changes, not the default. A **Reset to original** button appears next to **Edit** once you've customized one of these four; clicking it (with a confirmation step) discards your copy and reverts to the current default content.

Until you customize a given plan-provided template, it always reflects the *current* SmoovOps default — if that default's content is ever improved in a later update, you see the improvement automatically, with nothing to do on your side. Once you've customized it, your own version is what you and your team see, and stays that way until you either edit it again or click **Reset to original**. Custom templates you've added yourself (Pro plan) have no default to reset to, so they never show this button.

Appearance of the plan-provided templates

The **Termination Notice**, **Contractual Notice**, **Offer**, and **Invoice** templates are laid out for standard German business correspondence: the recipient's address sits at the position expected by a windowed envelope, your company logo (if you've uploaded one) appears in the top right, and a footer at the bottom of the page shows your managing director and Handelsregister details, up to two bank accounts, and your phone/email — whichever of these you've actually filled in under [Company Profile], [Addresses], and [Bank Accounts]. Anything you haven't filled in is left out entirely rather than shown blank. This layout only applies to these four SmoovOps-provided templates — a template you author yourself (Pro plan) uses whatever layout you write for it, including its own separate **Show company logo** setting (see step 5 above).

For the full syntax of that restricted Pug-style language — every tag, attribute, loop, and conditional it supports, with worked examples — see the Template Syntax Reference, also available as a standalone PDF.

Sending a document

Once a document is linked to a partner, a **Send** action becomes available on its detail page — for any document, whether it was generated or uploaded.

1. Open the document.
2. Click **Send**.

A "Sent on" badge and date appear on the document once sent, and you can send it again at any time — each send updates the date shown.

Editing a document

Open a document and click **Edit** to change any field, including its status.

Attaching, replacing, or removing a document's file

A document created without a file — for example, one added through **Import** (see below) or created without using the upload flow — has no file to view or download. Open such a document and you'll see an **Attach a file** prompt where the file preview would normally appear. Click **Choose file** and select the file from your device; it's uploaded and linked immediately, without triggering SmoovOps's automatic processing, so none of the document's existing fields change.

Once a document has a file, two more actions appear next to **Open file**:

- **Replace file** — pick a new file to swap in immediately; the previous file is deleted from storage once the new one is safely uploaded.
- **Remove file** — asks for confirmation, then deletes the file and returns the document to the "no file attached" state; the file is deleted from storage, not just unlinked.

Either action permanently deletes the previous file from storage — this can't be undone. If storage cleanup fails for some reason, the document still updates but a warning is shown so you know to check manually.

Import & Export Free

On all plans, including Free, you can bulk-import and bulk-export your documents list.

To import documents: 1. Click **Import** at the top of the Documents page. 2. Upload a CSV, Excel (.xlsx), or ODS file. The file must include a header row, with columns in this order: Name, ID, Document Type, Contract, Partner, Status, Creation Date, Net Amount, Tax Amount, Total Amount. 3. Review the preview and confirm the import.

If a row's **Contract** or **Partner** column matches the name of exactly one existing contract or partner, the imported document is linked to it automatically — the two are resolved independently, so a document can end up linked to one, both, or neither. A name that matches none of your records, or more than one, is left unlinked for that row, and a warning lists which rows need fixing by hand afterwards. The last three columns are optional and only meaningful for Offer/Invoice-type documents — leave them blank for anything else.

To export documents: 1. Click **Export** at the top of the Documents page. 2. Choose your preferred format: CSV, Excel, or ODS. 3. The file downloads to your device immediately.

The export also includes a few read-only columns beyond what import accepts: **Sent Date**; a **Line Items** summary listing each line's product, quantity, price, and tax rate; a **Tax Breakdown** summary of the tax subtotal per rate used (see Generating a document from a template above); and **Generated From** (the source Offer, for a generated Invoice — see Generating an Invoice from an Offer above). These are informational only; re-importing an exported file simply ignores them.

Notes & Reminders

Notes let you jot down information and follow-ups against a Partner, a Contract, a Payment, or a Product — right where that record lives, and all in one place if you need the full picture.

Notes vs. reminders

Every entry is either a **note** or a **reminder**:

- **Note** — a permanent piece of information: a title, some content, who wrote it, and when. There's nothing to schedule or complete.
- **Reminder** — the same as a note, but with a **due date** and a **done** checkbox (unchecked by default). Use reminders for anything you need to follow up on by a certain date.

Notes and reminders are shown with different icons throughout SmoovOps: a small sticky-note icon for notes, a bell icon for reminders.

Adding a note or reminder to a record

Open any **Partner**, **Contract**, **Payment**, or **Product** and go to its detail view. The middle column lists everything already attached to that record.

1. Click **Add Note** or **Add Reminder** above the list.
2. Fill in a **Title** and **Content**.
3. For a reminder, also set the **Due date**.
4. Click **Save**.

The new entry appears in the list and opens automatically in the right-hand column, where you can review it at any time.

Viewing, editing, and deleting

Click any note or reminder in the middle column to see its full content, creator, and creation date in the column on the right. From there:

- **Edit** — change the title, content, or (for a reminder) the due date.
- **Delete** — removes it after you confirm.
- **Done** — for a reminder, tick the checkbox (in the list or in the detail view) once you've followed up. Untick it to reopen a reminder you marked done by mistake.

A note can't be converted into a reminder or back — decide which one you need when you create it.

Reminders created automatically by a contract

Not every reminder is one you added yourself. Every contract automatically gets a reminder for its end date, and — if the contract has **Auto-renewal** configured under its Advanced options — SmoovOps keeps creating the next one as you mark each one done, for as long as the contract stays Active. These behave exactly like any other reminder: they appear in the contract's list and on the Notes page, and you edit, complete, or delete them the same way. See Automatic reminders and payments on the Contracts page for details.

The Notes page

Notes in the left sidebar opens a single page listing every note and reminder you've created, across all partners, contracts, payments, and products — no need to open each record individually to check what's outstanding.

- Switch between **Grid** and **List** view, same as on the Partners, Contracts, Payments, and Products pages.
- Each entry shows which type of record it belongs to (Partner, Contract, Payment, or Product).
- Use the search box to filter by title or content, and the pagination controls if you have a lot of entries.
- Click an entry to view, edit, mark done, or delete it — exactly as you would from the record's own detail page.

Once you've selected an entry, its detail view also shows a button next to the record-type badge — the same icon used elsewhere for jumping to a linked record (for example a payment's linked contract) — that takes you straight to the specific partner, contract, payment, or product it's attached to.

Creating a new note or reminder always happens from the specific Partner, Contract, Payment, or Product it belongs to, not from the Notes page itself — that way SmoovOps always knows which record a new entry is attached to.

Overdue reminders

A reminder becomes **overdue** once its due date has arrived and it hasn't been marked done yet. SmoovOps highlights overdue reminders in three places:

- A **yellow bell** next to **Notes** in the left sidebar — visible from any page, so you always know at a glance whether something needs your attention.
- The same **yellow bell** in the top navigation bar, just to the left of the light/dark mode switch — visible even if the sidebar is collapsed.
- A **yellow bell** (and a yellow due date) on the reminder itself, wherever it appears — in a record's own detail view and on the Notes page.

Once you mark an overdue reminder done, or update its due date to a future date, the yellow highlighting disappears.

Payments

The Payments module lets you record and track every payment connected to your contracts — whether it has been received, is still pending, or needs following up.

How payments relate to contracts

Each payment is linked to a contract (which brings its partner along automatically). You can optionally add a document number for your own reference. Recording payments against a contract lets you see at a glance what has been settled and what is still outstanding.

Payment statuses

Status	Meaning
Pending	The payment has been initiated or is expected but not yet confirmed.
Marked	You've confirmed this payment happened — manually or via a bank statement match — but haven't finalised it yet. See Reconciling payments below.
Succeeded	The payment has been received and confirmed.
Failed	The payment attempt did not go through.
Refunded	The payment was returned to the partner.

Payment methods

When recording a payment, select the method that was used:

- **Bank Transfer** — direct bank-to-bank payment
- **Credit Card** — card payment
- **Direct Debit** — automatic deduction from the partner's account
- **Other** — any method not listed above

Recording a payment

1. Go to **Payments** in the left sidebar and click **Add payment**.
2. Use the contract picker to search for and select the **Contract** this payment applies to. This fills in the linked partner automatically; use **Change** if you picked the wrong one. The picker shows your most recently updated contracts by default, so the common case needs no typing at all.
3. Optionally enter a **Document Number** for your own reference.
4. Set the **Status** (usually **Succeeded** for a payment that has arrived).
5. Choose the **Payment method**.
6. Enter the **Amount**, **Currency**, and **Payment Date**.
7. Click **Save**.

Notes and reminders

Open a payment's detail view to see its linked contract, with the same jump-to-linked-record icon used elsewhere in SmoovOps (for example on the Notes page) to go straight to that contract's own detail page. From here you can also attach your own notes and reminders to the payment — for example a note about how it was settled, or a personal reminder to follow up with the partner. See the Notes & Reminders page for how these work, including the **Notes** page that lists everything across all your partners, contracts, and payments in one place.

This is separate from the automatic reminder emails described below, which are triggered by a contract's own settings — the notes and reminders here are entirely up to you.

Recurring payments

If a contract has a **Billing cycle** set under its Advanced options (see the Contracts page), you don't need to create every period's payment by hand: once you mark the current payment **Succeeded**, SmoovOps automatically creates the next one — due date advanced by one billing cycle (Monthly, Quarterly, or Yearly), same amount — for as long as the contract stays **Active**. Every contract also automatically gets one initial payment for its total value the moment it becomes Active, whether or not a billing cycle is set.

Automatic email reminders

SmoovOps can email you before a payment falls due, so you don't have to check the app every day to avoid missing one. The lead time comes from the linked contract's **Notice period** (Advanced options), or 3 days if the contract doesn't set one. Once a contract is no longer **Active**, its payments stop generating reminder emails, even if a payment is still open.

This is separate from the notes and reminders above — those are private entries you create yourself and are never emailed to anyone; this is SmoovOps proactively notifying you about payments it already knows are coming up.

AI-assisted payment data collection Pro

On the Pro plan, SmoovOps can read payment confirmation documents or emails and pre-fill the payment details for you automatically. Instead of typing in the amount, date, and reference manually, you provide the confirmation and SmoovOps extracts the relevant information and creates a draft payment record. You review and confirm before it is saved.

Viewing and filtering payments

Go to **Payments** in the left sidebar to see the full list. Each row shows the linked contract, the partner name, the payment date, the method, the amount, and the status.

Use the toggle above the list to switch between **Grid** and **List** view — your choice is remembered the next time you visit the page. Use the **1 month**, **3 months**, or **6 months** buttons to widen or narrow the list to payments due in that period — your choice is remembered too, including after you edit, delete, or otherwise navigate away from and back to the list. Use the search box to filter by partner name or contract name, and use the status filter to see only pending, succeeded, or failed payments.

Next to each amount, a small **SOLL** or **HABEN** label shows which side of the books that payment falls on — see Payment Accounting Terms on the Settings page to change which term applies to incoming vs. outgoing payments for your whole team. The **Customer**/**Vendor** badge next to the partner name shows the same incoming/outgoing direction, based on whether the linked contract's partner is a customer or a vendor.

Reconciling payments

Instead of opening every payment individually to mark it **Succeeded**, use **Reconcile** to work through everything due in a period at once. Every plan, including Free, can do this by hand — see Marking payments as paid manually below. On the **Pro** plan, SmoovOps can additionally do the matching for you against an uploaded bank statement, described next.

Bank statement or shopping receipt? Pro

At the top of the Reconcile screen, a switch lets you choose between **Bank statement** and **Shopping receipt** — only one is shown at a time. Use **Bank statement** to reconcile payments against your actual bank activity, described below. Use **Shopping receipt** to log variable spending (groceries, fuel, and similar) against a monthly budget instead — see Tracking budgets from shopping receipts further down. Switching between the two doesn't lose your place in either — an in-progress bank statement review or an uploaded receipt waiting for review is still there when you switch back.

Both of these use AI-assisted data extraction, so the switch — and everything below it on this page — only appears on the **Pro** plan; a Pro account can also turn the **Shopping receipt** side off entirely, see Tracking budgets from shopping receipts. On the Free and Starter plans, the Reconcile screen shows only the manual list described in Marking payments as paid manually.

Reconciling against a bank statement Pro

If you'd rather match payments against your actual bank activity than mark them one by one, upload your bank statement and let SmoovOps do the matching for you.

1. Go to **Payments** in the left sidebar and click **Reconcile**. Select **Bank statement** in the switch at the top of the screen if it isn't already selected.
2. Check or uncheck **Automatically mark high-confidence matches as paid** to your liking — see Automatic matching confidence below. Your choice is remembered for next time.
3. Drag and drop your bank statement onto the upload area, or click **Choose File** to browse.
4. SmoovOps reads every transaction in the statement and compares it against the payments due in the period you uploaded it for — matching on the exact amount and currency, then scoring how closely the counterparty name and reference text line up with the payment's partner and contract.

Only one bank statement can be reviewed at a time. If you try to upload a new one while another is still in progress, you'll see a banner linking back to the one that's already open instead of the upload area.

Automatic matching confidence Pro

- **High-confidence match, with automatic approval switched on** — the matched payment is staged **Marked** without any action from you.
- **A match was found, but confidence is lower — or automatic approval is switched off** — the transaction is listed on the review screen for you to decide.
- **No matching payment found** — shown as "No match found". This is informational only and never blocks finishing the review.

Reviewing matched transactions Pro

The review screen lists every transaction from the uploaded statement, showing its amount, counterparty, reference, and value date alongside the payment it was matched to (if any) and a match score.

- Click **Accept** to confirm a suggested match — this stages the payment **Marked**, the same as an automatic match would.
- Click **Reject** if the suggestion is wrong — the payment is left untouched at its current status.
- Leaving a transaction unresolved is fine; it just stays informational. Once you're done, click **Done reviewing** to finish — this frees up the slot so you can upload the next statement.
- If you uploaded the wrong file, click **Discard** instead of reviewing it, then confirm — this removes the statement without touching any payment it may have already matched.

Marking payments as paid manually

Below the bank statement area, the Reconcile screen also lists every payment due in the period currently selected on the main list (1, 3, or 6 months).

1. Tap a **Pending** payment to stage it **Marked** — tap it again to undo. Payments already **Succeeded**, **Failed**, or **Refunded** aren't affected here; correct those from the payment's

own edit form instead.
2. Check **Hide paid** to temporarily remove already-**Succeeded** payments from the list while you work — this only changes what's shown, not their status.
3. Once everything you've confirmed is staged, click **Confirm marked payments** to promote all of them to **Succeeded** in one step.

Whichever way a payment ends up **Marked** — manually or via a bank statement — **Confirm marked payments** is what promotes it to **Succeeded**.

Tracking budgets from shopping receipts Pro

Not every expense is tied to a fixed contract and payment — groceries, fuel, and similar variable spending don't fit the Payments model above. For these, set a monthly budget per category and log your receipts against it: uploading a receipt doesn't mark anything "paid", it simply deducts the receipt's amount from that category's remaining budget for the current calendar month.

This uses the same AI-assisted data extraction as bank statement reconciliation above, so it's available on the **Pro** plan only — it isn't available on the Free or Starter plans. The account owner or an admin can also switch it off entirely for the whole team — see [Turning budget tracking on or off](#) on the Settings page.

Setting up budget categories

Before logging any receipts, define at least one category to log them against.

1. Go to **Payments**, click **Reconcile**, select **Shopping receipt** in the switch at the top, then click **Manage budgets**.
2. Click **Add category** and give it a **Name** (for example "Groceries"), a **Monthly limit**, a **Currency**, and a few **Keywords** — words you'd expect to see in the vendor name on a receipt for this category (for example "rewe, edeka, supermarket"). These keywords are what SmoovOps uses to suggest a category automatically when you upload a receipt.
3. Click **Save**. Repeat for each category you want to track.

Each category shows how much of its monthly limit remains, based on the receipts logged against it so far this calendar month. Use the **Active** toggle to hide a category from the upload flow without losing its history, and the edit or delete icons to change or remove a category entirely.

Uploading a receipt

1. Go to **Payments**, click **Reconcile**, and select **Shopping receipt** in the switch at the top of the screen.
2. Check or uncheck **Automatically log high-confidence category matches** to your liking — see [Automatic matching confidence](#) above; the same idea applies here, just for categories instead of payments. Your choice is remembered for next time.
3. Drag and drop your receipt onto the upload area, or click **Choose File(s)** to browse — you can upload more than one receipt at once.
4. SmoovOps extracts the amount, date, and vendor from each receipt and suggests the best-matching budget category based on your keywords.

Unlike bank statements, there's no single-review-at-a-time limit here — upload as many receipts as you like, whenever you like.

Reviewing a receipt

Each uploaded receipt appears on a review list showing its extracted amount, date, and vendor, plus the suggested category if one was found.

- If the suggestion looks right, confirm it and click **Save** — this creates a budget entry against that category and reduces its remaining budget for the month.
- If you'd rather use a different category, pick it from the category list before saving.

- If no suggestion was found, or none of your categories fit, pick one manually — a receipt can also be reviewed with no category chosen at all, if you just want to discard it.
- Click the delete icon on a receipt to remove it without logging anything.

A category's remaining-budget figure never blocks a new receipt — once a category's limit is used up, its remaining amount is shown as zero, but you can keep logging further receipts against it for the rest of the month.

Import & Export Free

On all plans, including Free, you can bulk-import and bulk-export your payments list.

To import payments: 1. Click **Import** at the top of the Payments page. 2. Upload a CSV, Excel (.xlsx), or ODS file. The file must include a header row, with columns in this order: Contract, Partner, Document, Status, Amount, Currency, Date, Method. 3. Review the preview and confirm the import.

If a row's **Contract** or **Partner** column matches the name of exactly one existing contract or partner, the imported payment is linked to it automatically — the two are resolved independently, so a payment can end up linked to one, both, or neither. A name that matches none of your records, or more than one, is left unlinked for that row, and a warning lists which rows need fixing by hand afterwards.

To export payments: 1. Click **Export** at the top of the Payments page. 2. Choose your preferred format: CSV, Excel, or ODS. 3. The file downloads to your device immediately.

Products

The Products module is your catalogue of the things you sell or provide — a place to keep the services and goods you offer, with their pricing, organised and searchable.

Product types

Every product has a type:

- **Service** — something you do or deliver as a service, such as consulting, design work, maintenance, or coaching
- **Goods** — a physical product or tangible item you sell

The type helps you organise your catalogue and can be used to filter when searching.

Viewing your products

Go to **Products** in the left sidebar. The list shows each product's name, type, unit price, currency, and unit of measure. Use the search box to filter by name or tag.

Adding a product

1. Click **Add product** at the top right of the Products page.
2. Fill in the details:
3. **Name** — the product or service name (required)
4. **Type** — Service or Goods
5. **Unit price** — the price for one unit
6. **Currency** — the currency the price is expressed in
7. **Unit** — the unit of measure (for example: hour, day, piece, item, licence)
8. **Description** — optional details about what is included
9. **Tags** — optional labels to help you group and search
10. **Tax Rate** — optional; which of your account's tax rates applies to this product when it's used as a line item on a generated Offer or Invoice
11. Click **Save**.

Editing a product

Click the edit icon next to any product to open the edit form. Update the fields you need and click **Save**.

Deleting a product

Click the delete icon next to a product and confirm the deletion. As with editing, existing records that reference the product are not affected.

Grid and List view

Use the toggle above the list to switch between **Grid** view (a card per product) and **List** view (a compact table). Your choice is remembered the next time you visit the page.

Import & Export Free

On all plans, including Free, you can bulk-import and bulk-export your product catalogue.

To import products: 1. Click **Import** at the top of the Products page. 2. Upload a CSV, Excel (.xlsx), or ODS file. The file must include a header row with the column names matching the expected fields (Name, Type, Unit Price, Currency, Unit, Description, Tags, Tax Rate). 3. Review the preview and confirm the import.

If a row's **Tax Rate** column matches the name of exactly one of your account's tax rates, the imported product is linked to it automatically. If it matches none or more than one, the product is still imported but left without a tax rate, and a warning lists which rows need fixing by hand afterwards.

To export products: 1. Click **Export** at the top of the Products page. 2. Choose your preferred format: CSV, Excel, or ODS. 3. The file downloads to your device immediately.

Files

The Files feature lets you attach documents to your contracts and records — signed agreements, certificates, attachments, correspondence, or any other file relevant to your business.

Storage availability by plan

File storage is not available on the Free plan. To upload and store files, you need a paid plan:

Plan	Storage included
Free	No file storage
Starter	10 GB
Pro	100 GB

If you are approaching your storage limit, you will see a warning in the app. Upgrading your plan increases your storage allowance immediately.

Uploading a file Starter+

Files are uploaded in the context of the record they belong to — for example, from within a contract.

1. Open the contract (or other record) you want to attach a file to.
2. Click **Upload file** or drag and drop a file onto the upload area.
3. A progress bar shows the upload status. Wait for it to reach 100% before closing the page.
4. The file appears in the record's file list once the upload is complete.

There is no restriction on file type. You can upload PDFs, Word documents, images, spreadsheets, and any other file format.

Viewing and downloading files Starter+

Attached files appear in a list within the record they belong to. Each entry shows the file name and the upload date. Click on a file name to download it to your device.

Deleting files Starter+

Click the delete icon next to a file and confirm the deletion. Deleted files are removed permanently and cannot be recovered, so check before you delete.

A note on storage usage

Your storage usage is the total size of all files across all your records combined. You can see your current usage in your account settings. Deleting files frees up storage space.

Account

Settings

The Settings page lets you personalise how SmoovOps looks and behaves for you.

Opening Settings

Click your name or the user icon in the top bar, then choose **Settings** from the dropdown menu. Choosing **Activity Log** from the same menu takes you straight to the Activity tab (see Viewing your activity log below).

Page layout

Settings has four tabs: **General**, **Company**, **Billing**, and **Activity**.

- **General** — Language, Appearance, and Newsletter. Visible to everyone, on any plan and any role.
- **Company** — your **Company Profile**, your company **Addresses**, your company **Bank Accounts**, **Reminder Emails**, **Invoice and offer pricing**, **Regional Settings**, **Payment Accounting Terms**, **Tax Rates**, and (Starter/Pro) **API Tokens**. Only visible to the account **Owner** or an **Admin** — a regular **User** doesn't see this tab at all.
- **Billing** — your **Plan**, **Billing Information**, and **Team**. Also only visible to the account **Owner** or an **Admin**; a regular **User** doesn't see this tab either. Some sections within it have their own narrower visibility rules on top of that — see each section below.
- **Activity** shows a log of actions taken on your account — see Viewing your activity log below. Visible to everyone, but what you see inside it still depends on your role.

The **Receipt Budgets** section (see Turning budget tracking on or off) only appears on the Company tab at all for accounts where it applies — see that section for the exact conditions.

Display language

SmoovOps is available in **English** and **Deutsch**. To change the language:

1. Go to **Settings**.
2. Under **Language**, select the language you prefer.
3. The page reloads and the entire interface switches to the selected language.

The language setting is stored in your session. If you use SmoovOps on multiple devices or browsers, you may need to set the language on each one.

Light and dark mode

SmoovOps supports three appearance options: **Light**, **Dark**, and **System** — where System follows your device's own light/dark setting and switches automatically if you change it. The dark theme is easier on the eyes in low-light environments.

From Settings: 1. Go to **Settings**. 2. Under **Appearance**, select **Light**, **Dark**, or **System**. 3. The interface updates immediately.

From anywhere: click the sun/moon/half-circle icon in the top navigation bar to cycle through System → Light → Dark and back to System, without opening Settings. Whichever option you pick — from Settings or the navbar icon — is remembered for next time.

Newsletter

The **Newsletter** section, on the **General** tab of the Settings page below **Appearance**, lets you opt in to occasional emails from SmoovOps about new features and product updates. It's off by default — you have to actively switch it on to receive anything.

To subscribe or unsubscribe: 1. Go to **Settings**, under the **General** tab, then **Newsletter**. 2. Switch **Receive the SmoovOps newsletter** on or off. 3. Changes save automatically — no separate Save button.

This is a personal preference, not a company-wide one — every team member decides for themselves, regardless of role.

Managing your plan

The **Plan** section, on the **Billing** tab of the Settings page, shows your current plan.

- If you are the account **Owner**, the Plan section is always visible — including on the free **Free** plan.
- If you are an **Admin**, the Plan section is only visible once the account is on a **paid plan** (Starter or Pro) — it's hidden while the account is still on the free plan.

- A regular **User** does not see the Plan section, or the Billing tab, at all.

- Go to **Settings**, under the **Billing** tab.

- Under **Plan**, your current plan and account type are shown.
- If a higher plan is available for your account type, an **Upgrade** button appears. Select it, then confirm — the upgrade takes effect immediately.
- If you're already on the highest plan for your account type, no upgrade button is shown.

Upgrades move you one step up:

- **Free** Free → **Starter** Starter+
- **Starter** Starter+ → **Pro** Pro

Downgrading to a lower plan isn't available from Settings — contact the SmoovOps support team if you need this.

To compare what each plan includes before upgrading, visit the Pricing page.

On a paid plan, the Plan section also shows the amount due on your next payment — the plan's per-user price multiplied by your current number of team members, with a note that it excludes VAT, same as on the Pricing page. This isn't shown on the Free plan, since it isn't billed per user, or once a contract has been cancelled.

Quitting your contract

The account **Owner** — on any plan, Free, Starter, or Pro — can end the contract immediately from the Plan section. An Admin or a regular User never sees this option, on any plan.

1. Go to **Settings**, under the **Billing** tab, then **Plan**.
2. Select **Quit Contract**.
3. Confirm — this takes effect immediately.

This is permanent. Once confirmed, the contract cannot be reactivated, upgraded, or changed from Settings again — the Plan section instead shows a notice that the contract has been cancelled. If you cancel by mistake, contact the SmoovOps support team.

Billing information

The **Billing Information** section, on the **Billing** tab of the Settings page directly below **Plan**, stores how your account pays for its subscription. It follows the same visibility rule as Plan above: always visible to the account **Owner**, even on the free Free plan; visible to an **Admin** only once the account is on a paid plan; not visible to a regular **User**.

Two payment methods are available, and you choose one at a time:

- **Bank Account** — Account Holder, IBAN, and BIC/SWIFT.
- **Credit Card** — card brand, last 4 digits, and expiry date, plus the security code (CVV) to confirm the card. The security code is only used to verify the card at the moment you save it — it is never stored, and the full card number is never collected here at all. Only the brand, last 4 digits, and expiry are kept on file.

To set or change your billing method: 1. Go to **Settings**, under the **Billing** tab, then **Billing Information**. 2. Select **Bank Account** or **Credit Card** — only the fields for the method you select are shown. 3. Fill in the fields and click **Save**.

Whichever method you save most recently becomes your account's active billing method, and is shown by default the next time you open Settings. Switching between Bank Account and Credit Card does not erase the other method's previously saved details — you can switch back without re-entering them.

Managing your company profile

The **Company Profile** section, at the top of the **Company** tab of the Settings page, stores your business's legal identity — used as the sender details on documents you generate from a template. This is only visible to the account **Owner**.

To set your company profile: 1. Go to **Settings**, under the **Company** tab. 2. Under **Company Profile**, fill in your **Legal name** (required), and any of **Tax ID**, **VAT ID**, **Registration court**, **Registration number**, **Managing director** (its title/role, and separately its name), **Website**, and **Logo** that apply to your business. 3. Click **Save**.

Your legal name, tax details, registration court and number, managing director, logo, and website appear on generated documents alongside your **Main** address (see Managing your company address below) — including that address's contact name, email, phone, and country, not just its street and city. Generating a Letter, Offer, or Invoice requires at least a **Legal name** to be saved here first; see Generating a document from a template.

Website is a link to your business's own website, stored alongside your legal details. **Logo** lets you upload an image of your company logo — unlike a partner's logo, it's kept exactly as uploaded, without any resizing, since it may be reused at full resolution in document templates.

Managing director is two separate fields: a title or role (SmoovOps suggests "Geschäftsführer o.ä." as a starting point, but you can replace it with whatever fits your business — "Inhaber" for a sole proprietorship, for example) and the person's name. Both are shown together on generated documents; leaving the title empty hides this line entirely, even if a name is filled in.

Managing your company address

The **Addresses** section, on the **Company** tab of the Settings page directly below **Company Profile**, stores your own company's addresses — for example your business address and a separate billing address — rather than a partner's. This is only visible to the account **Owner**.

To add an address: 1. Go to **Settings**, under the **Company** tab. 2. Under **Addresses**, click **Add Address**. 3. Choose the **Usage** (Main, Billing, Shipping, or Other), fill in the contact person, email, phone, and postal address fields you need, and click **Save**.

You can add as many addresses as you need, and edit or remove any of them at any time using the pencil or trash icon next to it.

Managing your company bank accounts

The **Bank Accounts** section, on the **Company** tab of the Settings page directly below **Addresses**, stores up to two of your business's bank accounts — shown on generated Letters, Offers, and Invoices so recipients know where to send payment. This is only visible to the account **Owner**.

To add a bank account: 1. Go to **Settings**, under the **Company** tab. 2. Under **Bank Accounts**, click **Add Bank Account**. 3. Fill in the **Bank name**, **IBAN**, and **BIC/SWIFT**, then click **Save**.

You can edit or remove a saved account at any time using the pencil or trash icon next to it. Once two accounts are saved, **Add Bank Account** is replaced by a note that up to two can be added — remove one first if you need to add a different one.

Managing your team Free

Every plan, including Free, lets more than one person use the same SmoovOps account. The **Team** section, on the **Billing** tab of the Settings page, lets you invite additional users and see who's on your team. How many team members you can have depends on your plan:

Plan	Team members (including you)
Free	2
Starter	5, billed per additional user
Pro	Unlimited, billed per additional user

Once you reach your plan's limit, the Team section shows how many seats you've used and you'll need to upgrade to invite more people.

The Team section is visible to the account **Owner** or an **Admin** — on any plan.

Roles

- **Owner** — the person who originally registered the account. There is exactly one owner per account, and this role can't be reassigned from Settings.
- **Admin** — can invite additional users, same as the owner.
- **User** — a regular team member. Can't invite anyone and doesn't see the Team section.

Inviting a user

1. Go to **Settings**, under the **Billing** tab.
2. Under **Team**, you'll see a list of everyone already on your account, with their role and status (**Pending** until they've confirmed their email and set a password, **Active** afterwards).
3. Fill in the new user's **name** and **email address**, choose whether they should be an **Admin** or a **User**, then select **Invite user**.
4. The new user receives an email with a confirmation code and a link. Once they open the link, confirm the code, and choose their own password, their status changes to Active and they can log in.

You don't set a password for the people you invite — each person chooses their own when they confirm their invitation.

Changing a team member's role

The account **Owner** or an **Admin** can change any other **Admin** or **User** between those two roles at any time — the Owner's own role can never be changed from here, and you can't change your own role either.

1. Go to **Settings**, under the **Billing** tab, then **Team**.
2. Next to the person whose role you want to change, use the **Role** dropdown to select **Admin** or **User**.

The change takes effect immediately — no separate save step or confirmation needed.

Removing a team member

The account **Owner** or an **Admin** can remove any **Admin** or **User** from the team — the Owner's own row can never be removed, and you can't remove yourself.

1. Go to **Settings**, under the **Billing** tab, then **Team**.
2. Next to the person you want to remove, select **Remove**.
3. Select **Confirm** to finish, or **Cancel** to back out.

Removing someone takes effect immediately: they lose access right away, disappear from the Team list, and free up a seat for a new invite. This can't be undone from Settings — contact the SmoovOps support team if you need to restore a removed team member.

Forgot password

If you or someone on your team forgets their password, select **Forgot password?** on the login screen. Enter the email address to receive a reset code, then use that code to choose a new password.

Turning budget tracking on or off Pro

The **Receipt Budgets** section, on the **Company** tab of the Settings page, lets a Pro account turn the budget-tracking feature off for the whole team — for example if uncontrolled variable-spend tracking doesn't fit your organization's expense-approval process.

The Receipt Budgets section is only visible if both of these are true:

- Your account is on the **Pro** plan, and
- You are the **Owner** or an **Admin** on the account.

Budget tracking is a Pro-only feature — Free and Starter accounts don't have it available, so there's nothing to suppress on those plans.

To turn budget tracking off: 1. Go to **Settings**, under the **Company** tab. 2. Under **Receipt Budgets**, switch on **Suppress receipt budgets for this account**. 3. This takes effect immediately for every member of your team — the **Shopping receipt** switch on the Reconcile page disappears for everyone, and only the bank-statement upload area remains.

Switch it back off at any time to restore the feature for your team. Turning it off doesn't delete any budget categories or previously logged receipts — they're simply hidden from view until you turn it back on.

Reminder emails

Every contract with an end date or a renewal automatically gets a reminder — see Automatic reminders and payments. The **Reminder Emails** section, on the **Company** tab of the Settings page below **Addresses**, lets you control where those reminder emails are sent. It's visible to the account **Owner** or an **Admin**, on any plan.

Default reminder email address — the address every contract's reminder emails go to, unless that contract overrides it (see below). Leave it blank and reminders go to every team member instead.

Allow team members to override reminder emails per contract — when this switch is on, anyone on the team (not just owners/admins) can change where a specific contract's reminders go, or turn them off for that one contract, from the contract's own **Advanced options**. When it's off, only an owner or admin can change this per contract.

To set it up: 1. Go to **Settings**, under the **Company** tab, then **Reminder Emails**. 2. Enter a **Default reminder email address**, and/or switch on **Allow team members to override reminder emails per contract**. 3. Changes save automatically — no separate Save button.

The yellow reminder bell in the navigation bar always shows upcoming reminders to everyone on the team, regardless of who the reminder emails are actually sent to.

Invoice and offer pricing

The **Invoice & Offer Pricing** section, on the **Company** tab of the Settings page below **Reminder Emails**, controls who can change line-item pricing when generating a document — see [Overriding line-item pricing](). It's visible to the account **Owner** or an **Admin**, on any plan.

Allow team members to override line-item pricing — when this switch is on, anyone on the team (not just owners/admins) can change a line item's unit price, and edit the line items copied over when generating an Invoice from an Offer. When it's off, only an owner or admin can do either of those; everyone else sees the catalogue price and the copied-over line items, but can't change them.

To set it up: 1. Go to **Settings**, under the **Company** tab, then **Invoice & Offer Pricing**. 2. Switch on **Allow team members to override line-item pricing**. 3. Changes save automatically — no separate Save button.

Regional Settings

The **Regional Settings** section, on the **Company** tab of the Settings page below **Invoice & Offer Pricing**, controls how dates, numbers, and currency amounts are displayed for your whole team. It's visible to the account **Owner** or an **Admin**, on any plan.

- **Date format** — choose `DD.MM.YYYY`, `DD/MM/YYYY`, or `YYYY-MM-DD`. Each option in the dropdown shows a formatted example date so you can preview the pattern before choosing.
- **Number format** — choose `1.234,56` (dot for thousands, comma for decimals) or `1,234.56` (comma for thousands, dot for decimals).
- **Currency** — choose from EUR, GBP, CHF, SEK, DKK, NOK, PLN, CZK, HUF, RON, BGN, or ISK.

To change it: 1. Go to **Settings**, under the **Company** tab, then **Regional Settings**. 2. Pick a value from any of the three dropdowns. 3. Changes save automatically — no separate Save button.

By default, new accounts use `DD.MM.YYYY`, `1.234,56`, and EUR.

Your date and number format apply everywhere dates and amounts are shown — Payments, Products, Contracts, Notes, Documents, generated Offers and Invoices, the Dashboard, and account activity/API token timestamps. A record's own currency (for example a payment or product saved in USD) is always shown alongside its amount as-is; the Regional Settings currency only sets the default for newly created records and the Dashboard's aggregate figures.

Payment Accounting Terms

The **Payment Accounting Terms** section, on the **Company** tab of the Settings page below **Regional Settings**, controls which German bookkeeping term — **SOLL** or **HABEN** — is shown next to a payment's amount on the [Payments]() list, grid, and detail views, for your whole team. It's visible to the account **Owner** or an **Admin**, on any plan.

Only one dropdown, **Incoming payments**, needs setting — the term for outgoing payments always follows automatically as the other one of the pair:

- **Incoming = HABEN, Outgoing = SOLL** — the default. Treats a customer's payment as crediting (HABEN) their debtor account, and a payment to a vendor as debiting (SOLL) the creditor account.
- **Incoming = SOLL, Outgoing = HABEN** — the opposite convention, treating an incoming payment as a debit (SOLL) to your bank/cash account and an outgoing one as a credit (HABEN) to it.

Both are valid bookkeeping conventions depending on which account's perspective you're booking from — pick whichever matches how your own books are kept.

To change it: 1. Go to **Settings**, under the **Company** tab, then **Payment Accounting Terms**. 2. Pick a value from the **Incoming payments** dropdown. 3. Changes save automatically — no separate Save button.

Tax Rates

The **Tax Rates** section, on the **Company** tab of the Settings page below **Invoice & Offer Pricing**, is where you maintain the named tax rates your account can assign to a product's **Tax Rate** field — see [Adding a product](). It's visible to the account **Owner** or an **Admin**, on any plan.

Each tax rate has a **Name** (for example "Standard" or "Reduced"), a **Rate (%)** between 0 and 100, and can be marked **Default** — new products default their Tax Rate field to whichever tax rate is marked default; existing products keep whatever they already have. Only one tax rate can be default at a time — marking a different one default un-marks the previous one automatically.

To manage your tax rates: 1. Go to **Settings**, under the **Company** tab, then **Tax Rates**. 2. Under **Add Tax Rate**, enter a **Name** and a **Rate (%)**, optionally check **Default**, and click **Add**. 3. To change a rate afterwards, click **Edit** on its row, adjust the fields, and click **Save**. 4. To make a different rate the default, select its radio button in the **Default** column. 5. To remove a rate you no longer need, click **Remove**, then **Confirm**.

A product's Tax Rate automatically applies to every line item using that product when generating an Offer or Invoice (see [Generating a document from a template]()) — there's nothing to set by hand per document. If your lines mix rates, the generated document shows a separate subtotal for each rate used.

API Tokens Starter+

The **API Tokens** section, on the **Company** tab of the Settings page below **Tax Rates**, is where you generate credentials for calling the SmoovOps API directly — from your own scripts, a CI pipeline, or a tool like Zapier — without a browser session. See [API Access]() for the full guide to using a token once you have one. It's visible to the account **Owner** or an **Admin**, on the **Starter** or **Pro** plan — not available on Free.

To generate a token: 1. Go to **Settings**, under the **Company** tab, then **API Tokens**. 2. Select **Generate new token**. 3. Give it a name — something that reminds you what it's for, e.g. "CI pipeline" or "Zapier" — and optionally an expiry date, then select **Generate**. 4. A dialog shows your new token and your account's API key, **exactly once**. Copy both now — SmoovOps never shows the full token again after this.

Every token you generate reuses the same account-wide **API key** — only the token itself is unique per integration.

To revoke a token: 1. Go to **Settings**, under the **Company** tab, then **API Tokens**. 2. Next to the token you want to revoke, select **Revoke**, then **Confirm**.

Revoking is permanent — if you revoke a token by mistake, generate a new one. A revoked token stops working within a few minutes, though not necessarily instantly everywhere.

Viewing your activity log

The **Activity** tab on the Settings page shows a log of actions taken on your account — for example signing in, inviting a team member, or creating and updating contracts, partners, and payments. Entries are listed with the newest action first.

To view it: 1. Go to **Settings** and select the **Activity** tab, or choose **Activity Log** directly from the user menu in the top bar. 2. Browse the list, newest activity at the top.

How far back you can see

How much history is available depends on your plan:

Plan	Activity history shown
Free	Last 30 days
Starter	Last 180 days
Pro	Last 180 days

Upgrading from Free to Starter immediately extends how far back you can see — no waiting period, since the activity was always being recorded, just not previously shown that far back.

Whose activity you see

- The account **Owner** and any **Admin** see activity from everyone on the account by default.
- A regular **User** only ever sees their own activity.
- On any plan — **Free**, **Starter**, or **Pro** — an Owner or Admin can narrow the list to one specific person using the **Filter by user** dropdown next to the search box — choose **All activities** to see everyone again.

Searching and loading more

Use the search box to narrow the currently displayed entries by action, person, or the item they affected. Search only looks through activity that's already been loaded on the page — if you're looking for something further back in time, select **Load more** first, then search.

Use the **Show** dropdown to choose how many entries load at a time (10, 25, or 50). If there's older activity beyond what's currently shown, a **Load more** button appears below the list; selecting it adds the next batch to what's already displayed.

API Access

SmoovOps can be called directly from your own scripts, CI pipelines, or tools like Zapier — without a browser session — using a **Personal API Token**.

What a Personal API Token is

A Personal API Token (PAT) is a secret credential, starting with `smv_live_`, that identifies you and your account to the SmoovOps API. It works the same way a login session does — anything you can do in the app, a request carrying your token can do too — so treat it like a password: don't share it, and don't commit it to source control.

Alongside your token, SmoovOps also gives you an **API key**. This is one fixed value per account (not per token) that the API uses to apply rate limits and daily quotas. You'll get your API key the first time you generate a token; every token you generate afterwards reuses the same key.

The two required headers

Every direct API request must include both of the following headers:

```
Authorization: Bearer smv_live_...
x-api-key: <your API key>
```

The `Authorization` header identifies you; the `x-api-key` header is what the API checks against your account's rate limit and daily quota.

Generating a token Starter+

1. Go to **Settings**, under the **Company** tab (visible to the account **Owner** or an **Admin** only).
2. Under **API Tokens**, select **Generate new token**.
3. Give it a name — something that reminds you what it's for, e.g. "CI pipeline" or "Zapier" — and optionally an expiry date.
4. Select **Generate**. A dialog shows your new token and your account's API key, **exactly once**. Copy both now — SmoovOps never shows the full token again after this.

If you lose a token, you can't recover it — revoke it and generate a new one instead.

Revoking a token

In the same **API Tokens** table, select **Revoke** next to a token, then confirm. This is permanent — if you revoke a token by mistake, generate a new one.

Revoking isn't instant everywhere: a request already in flight, or one made within a few minutes of revoking, may still succeed briefly. Changes may take a few minutes to take effect.

Rate limits and quotas

How many requests per second, and per day, your tokens can make depends on your plan — Pro accounts get a higher rate limit and daily quota than Starter. Requests over your daily quota, or too many requests too quickly, receive an error response until the limit resets. Contact the SmoovOps support team if your integration needs a higher limit than your plan provides.

Who can access the API

API access is available on the **Starter** and **Pro** plans. It isn't available on the **Free** plan — upgrade from **Settings** to unlock it.

Endpoint reference

Once you have a token, see the API Reference for the full list of endpoints and what each one expects in its request body.