

Invoicing & Billing

📄 **Status: Draft** — Will be updated when billing.unicis.tech is live.

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Purpose

To issue invoices accurately, collect payment reliably, and maintain clean financial records — for customers, partners, and EU project claims.

Owner

Predrag Tasevski — CEO / Visionary

Trigger

This process starts when: (a) a customer subscription is due for renewal, (b) a new customer subscription is activated, © a partner commission is due, or (d) an EU project milestone triggers a financial claim.

Steps

Customer Subscription Invoicing

1. **Invoice generated** — [Dolibarr](#) generates the recurring invoice automatically on the billing date (monthly or annual). Predrag reviews before sending. *\\Tool: Dolibarr*
2. **Invoice sent** — [Dolibarr](#) sends the invoice by email to the customer billing contact. *\\Tool: Dolibarr*
3. **Payment link included** — Invoice includes a Wise payment link for bank transfer. For customers requiring other payment methods, contact Predrag. *\\Tool: Wise*
4. **Payment confirmed** — Predrag marks the invoice as paid in [Dolibarr](#) when payment is received. Customer record updated. *\\Tool: Dolibarr*
5. **Overdue follow-up** — If unpaid after 14 days, Predrag sends a manual reminder via FreeScout. If unpaid after 30 days, escalate to a direct conversation. *\\Tool: FreeScout*

Partner Commission

1. **Commission calculated** — At the end of each month, Predrag reviews partner-referred subscriptions in [Dolibarr](#) and calculates commission per the Partner Agreement. *\\Tool: Dolibarr*
2. **Commission invoice received** — Partner sends their invoice to Unicis. Predrag reviews against [Dolibarr](#) records. *\\Tool: FreeScout / email*
3. **Payment sent** — Commission paid via Wise. Marked in [Dolibarr](#). *\\Tool: Wise, Dolibarr*

EU Project Financial Claim

1. **Eligible costs compiled** — Ksenija and Predrag compile eligible costs for the reporting period: personnel time (from [Dolibarr](#) time tracking), direct costs, subcontracting. *\Tool: [Dolibarr](#)*
2. **Financial report prepared** — Predrag prepares the financial report in the format required by the project grant agreement. *\Tool: [EU project portal template](#), [Nextcloud](#)*
3. **Submission** — Financial report submitted via the EU project portal. Confirmation saved in Nextcloud under /EU Projects/[Project Name]/Financial/. *\Tool: [EU project portal](#), [Nextcloud](#)*

Output

- Subscription invoices: paid and marked in [Dolibarr](#) within 30 days of issue
- Partner commissions: paid monthly, reconciled in [Dolibarr](#)
- EU claims: submitted on schedule per grant agreement, confirmations archived

Tools

- [Dolibarr](#) — invoice generation, customer records, time tracking, financial reporting
- [Wise](#) — payment processing and transfers
- [FreeScout](#) — overdue follow-up communications
- [Nextcloud](#) — financial document archive
- [EU project portal](#) — grant financial submissions

Notes / Exceptions

- Once [billing.unicis.tech](#) is live, customer self-service billing will replace manual [Dolibarr](#) invoicing for standard subscriptions. This process will be updated at that point.
- All financial records are confidential. Store only in [Dolibarr](#) and the restricted Nextcloud finance folder.
- VAT: Unicis is registered in Estonia (OÜ). EU B2B invoices use reverse charge. Non-EU customers: consult with the accountant.

Revision History

Date	Change	Updated by
2026-05-25	Initial draft	Predrag Tasevski

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[processes](#), [billing](#), [invoicing](#), [finance](#), [dolibarr](#)

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