

Partner Onboarding

□ **Status: Draft** — This process is defined but not yet fully operational. [billing.unicis.tech](#) and the partner programme are in development. Update this page when the partner programme launches.

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Purpose

To onboard new reseller, integration, or referral partners into the Unicis partner programme — from first contact to active, contracted, and billing-enabled partner.

Owner

Predrag Tasevski — CEO / Visionary

Trigger

This process starts when a prospective partner expresses formal interest in the Unicis partner programme (via contact form, direct outreach, or referral).

Steps

1. **Qualification** — Predrag reviews the prospective partner: company size, geography, existing customer base, alignment with Unicis ideal customer profile. If qualified, proceed. If not, send a polite decline. \\Tool: [Dolibarr](#) (CRM record)
2. **Discovery call** — 30-minute call to understand the partner's business, expected deal volume, and integration needs. \\Tool: [Nextcloud Talk](#), [Nextcloud Calendar](#)
3. **Partner agreement sent** — Predrag sends the standard Partner Agreement ([Dolibarr](#) document template). Agreement covers: commission structure, co-marketing obligations, support responsibilities, and term. \\Tool: [Dolibarr](#)
4. **Agreement signed** — Partner signs agreement. Signed copy stored in Nextcloud under [/Partners/Agreements/](#). [Dolibarr](#) record updated to Active Partner. \\Tool: [Dolibarr](#), [Nextcloud](#)
5. **Partner account created** — Partner receives access to: [billing.unicis.tech](#) partner portal (once live), partner documentation in the handbook, and Unicis demo environment. \\Tool: [billing.unicis.tech](#) (pending), [Handbook](#)
6. **Onboarding briefing** — 60-minute onboarding call covering: platform demo, pricing and commission model, how to register deals, how to escalate support issues. \\Tool: [Nextcloud Talk](#)
7. **Listed in partner directory** — Partner added to the Unicis website partner directory (if they consent to public listing). \\Tool: [unicis.tech](#) (Decap CMS)
8. **First deal registered** — Partner registers their first customer deal in the partner portal. Predrag confirms and begins customer onboarding via the [Customer Onboarding](#) process, noting the referring partner in [Dolibarr](#). \\Tool: [billing.unicis.tech](#), [Dolibarr](#)

Output

The process is complete when:

- The Partner Agreement is signed and stored
- The partner has access to all necessary tools and documentation
- The partner is listed in [Dolibarr](#) as an active partner
- The partner has received the onboarding briefing

Tools

- [Dolibarr](#) — partner CRM record, agreement template, commission tracking
- [Nextcloud](#) — agreement storage
- [Nextcloud Talk](#) — calls; [Nextcloud Calendar](#) — discovery and onboarding calls
- [billing.unicis.tech](#) — partner portal (in development)
- [Decap CMS](#) — website partner directory

Notes / Exceptions

- This process will be significantly updated once [billing.unicis.tech](#) is live with the partner portal.
- EU-based partners may require a Data Processing Agreement (DPA) in addition to the Partner Agreement. Confirm with Predrag.

Revision History

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

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