



Integrations

ELO Integration Client



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Introduction

Use

The ELO Integration Client enables you to use ELO functions in your ERP or CRM system and in other third-party applications. For example, you can create folders and store documents in ELO from within your ERP system.

Target audience

This documentation is aimed at ELO Integration Client users. [Separate documentation](#) is available for administrators.

The scope of functions presented in this documentation may differ greatly from those in your client.

If you do not find functions described in this documentation in your client, you do not have permission to perform the action.

For detailed information, e.g. on metadata, refer to the [ELO Web Client](#) and [ELO Java Client](#) documentation.

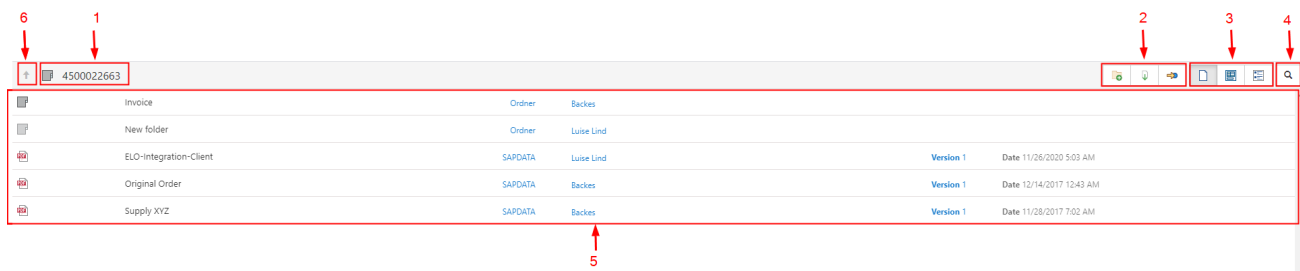
Basics

This chapter contains basic information on the ELO Integration Client interface. It will help you get familiar with the client.

Program interface

The ELO Integration Client shows ELO functions in your ERP or CRM system and in other third-party applications. The appearance of the program interface will differ depending on the system and configuration.

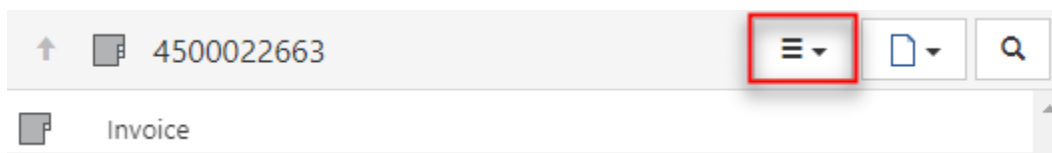
The ELO Integration Client displays specified entries (root entries) from the ELO repository. If the root entry is a folder, you can navigate and use ELO functions within this folder. For example, you can insert and edit files, and start workflows.



1 Current entry: Here you can see the name of the ELO entry you currently have open. This can be a folder or a file.

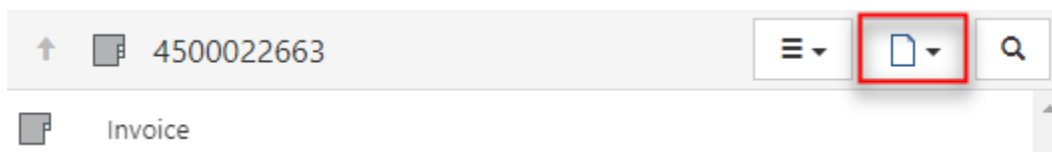
2 Functions: Here is where you launch ELO functions. Different functions are available depending on the entry and configuration. Hover the mouse over an icon to see the name of the function.

Depending on the size of your client window, you can access the functions from a menu.



3 Views: In the viewer pane (5), you see the contents of an ELO entry as well as the associated form or feed. You can use the icons to switch between the views.

Depending on the size of your client window, you can access the views from a menu.



4 Search: Use the magnifying glass icon to start a search for entries in ELO.

5 Viewer pane: Here you can see the ELO entry you currently have open. If the entry is a folder, the child entries are listed. If the entry is a document, the document contents are displayed.

6 Back: The arrow icon takes you back to the previous level. The root entry is the top level. If you are in the root entry, the arrow icon is grayed out.

Text and image view

The ELO Integration Client offers additional control elements in the viewer pane for displaying images (formats: e.g. JPG, TIFF, PNG, etc.) and text files (formats: e.g. TXT, HTML, JS, etc.) or the full text contents of documents.

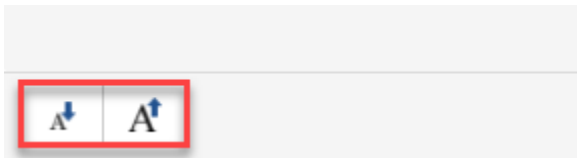
Text view

The text view is used to display the full text information of documents that have been added to the full text database. You can also configure this view for documents with specific file extensions.

Please note

Binary files may result in display errors.

The text view has a menu bar with the following functions:

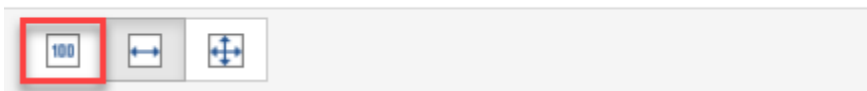


Decrease or increase font size: Decreases or increases the size of the displayed text.

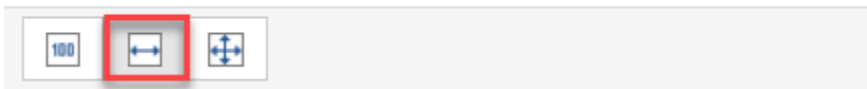
Image view

The image view is used to preview image documents. You can also set this as the display mode for documents with specific file extensions.

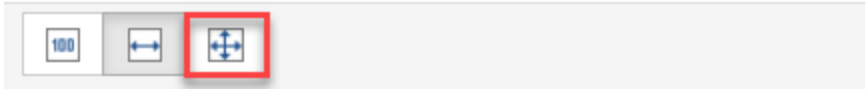
The image view has a menu bar with the following functions:



Zoom to 100%: The image is displayed in the original size.



Fit image width to the frame: The image size fits the width of the viewer pane.



Fit image size to the frame: The image is adjusted to the height of the viewer pane so that the entire page of the document is displayed.

Feed

The feed is used to share information on an entry in ELO (document or folder) and record changes to the entry. New feed posts are denoted with a green dot.

The following message types are shown in the feed:

- Posts
- Comments
- Polls
- Events, e.g. when a new version of a document is filed or changes are made to the working version

Create a post



Use the *Create a post* field to comment on the respective entry in a feed. Select *Create* to submit the post.

Alternative: Press CTRL+ENTER to submit a post.

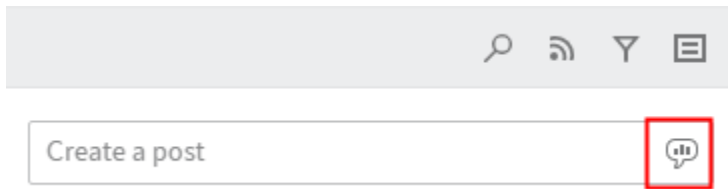
The text in posts, polls, and comments can be formatted as follows:

Bold: To format a part of the text in *bold* type, place an asterisk (*) at the beginning and end of the text section. I would like to emphasize this **again**. will appear in the ELO feed as follows: "I would like to emphasize this again."

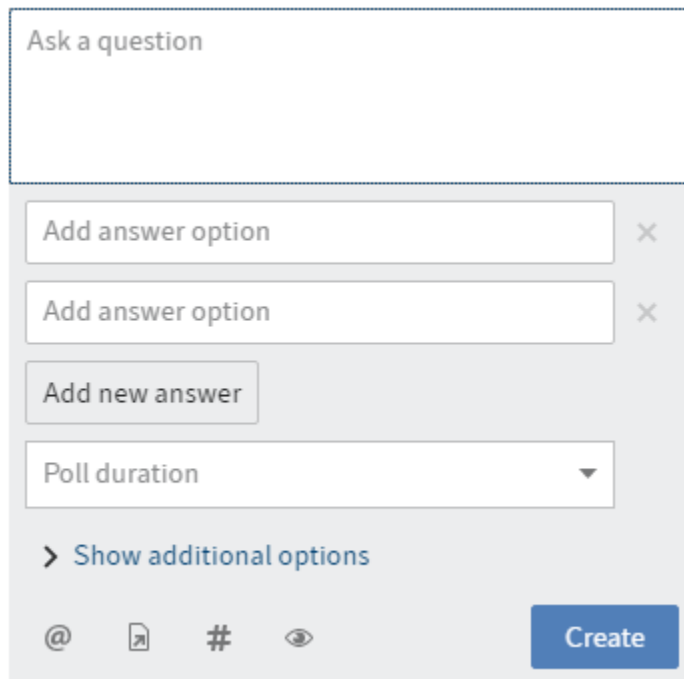
Information

If you want the asterisk to appear as a character in the text, enter a backslash before the asterisk.

Create a poll



Clicking the *Create poll* button opens a new area in the ELO feed. In this area, you can start a user poll.

A screenshot of the "Create a poll" form. The form is divided into several sections. At the top is a large text input field with the placeholder text "Ask a question". Below this are two smaller text input fields, each with the placeholder text "Add answer option" and a small 'x' icon to its right. Below these two fields is a button labeled "Add new answer". Below the button is a dropdown menu labeled "Poll duration". At the bottom of the form is a blue button labeled "Create". To the left of the "Create" button are four icons: a person icon (@), a document icon, a hashtag icon (#), and an eye icon.

Enter the title or question of the poll in the first input field (with the placeholder text *Ask a question*). Enter the answer options in the next input fields (with the placeholder text *Add answer option*). To create an additional answer option, click the *Add new answer* button. You can select how long you want the poll to remain open in the *Poll duration* field.

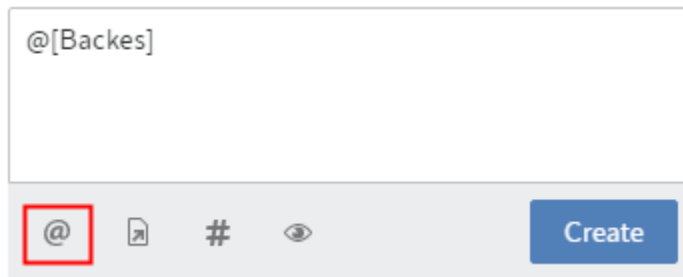
Select *Show additional settings* to open an area with additional settings. This is where you specify whether participants can select more than one answer, see the user names in the result, and add their own answers.

Select *Create* to start the poll.

Click the pencil icon to edit a poll that has already started. You can edit the poll as long as no one has taken part.

Click the X button to delete a poll that has already started. You cannot undo this.

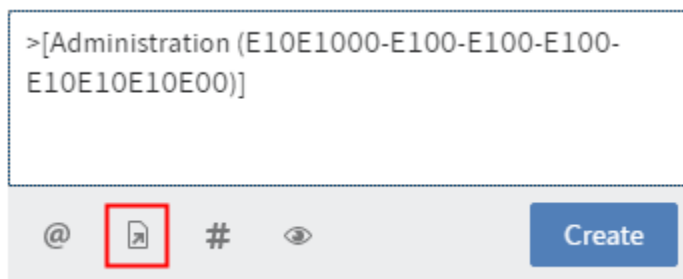
Mention



Use the *Mention* button (@ symbol) to address a feed post to another ELO user or group. The people mentioned can see the corresponding feed post in their *My ELO* work area.

Alternative: As soon as you type an @ character, ELO automatically recognizes that you want to insert a mention.

Reference

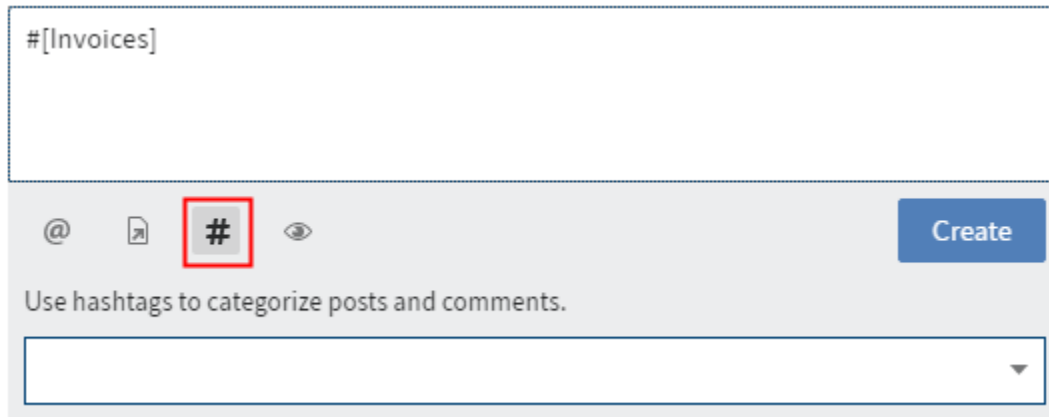


Use the *Reference* button (document icon with arrow) to link a feed post with an entry in ELO. Selecting the reference automatically takes the user to the filing location of the linked entry.

You can select the entry that you want to refer to in the *Reference* dialog box.

Alternative: As soon as you type a > character, ELO automatically recognizes that you want to insert a reference.

Hashtag



The screenshot shows a text input field containing the text "#[Invoices]". Below the input field is a toolbar with four icons: an '@' symbol, a document icon, a '#' symbol (highlighted with a red box), and an eye icon. To the right of the toolbar is a blue button labeled "Create". Below the toolbar is a text prompt: "Use hashtags to categorize posts and comments." and a search input field with a dropdown arrow.

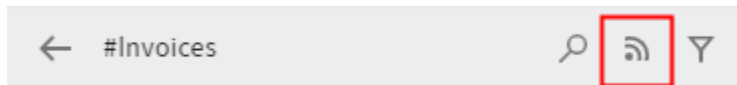
Use the *Hashtag* button (# symbol) to add hashtags to a post. Users can subscribe to hashtags.

Alternative: As soon as you type a # character, ELO automatically recognizes that you want to insert a hashtag. The hashtag drop-down menu opens.

Subscribe to a hashtag

Method

1. Select a hashtag to subscribe to it.

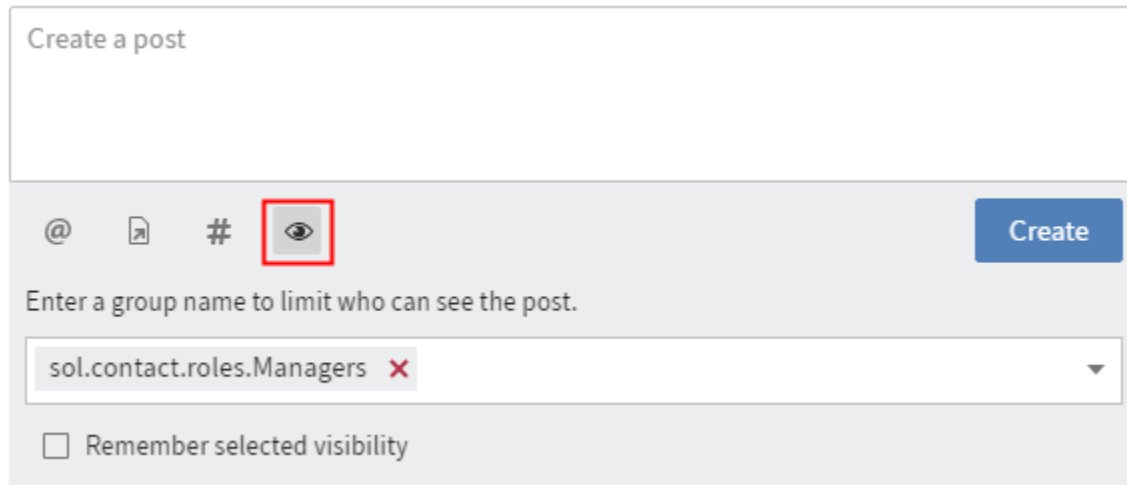


The discussion page for the selected hashtag appears.

2. Select the *Subscribe* button.

You have subscribed to the hashtag. All posts that are marked with the corresponding hashtag appear in the *My ELO* work area of the ELO Web Client or the ELO Java Client.

Visibility



Create a post

@ 📎 # 👁️ Create

Enter a group name to limit who can see the post.

sol.contact.roles.Managers ✕ ▼

Remember selected visibility

Use the *Visibility* button (eye icon) to restrict who can read the post. You can apply this restriction for future feed posts. Select the *Remember selected visibility* button. Your visibility settings will be set as the default for new feed posts.

Search feed



🔍 📡 🏠 📄

Create a post 🗨️

Select the *Search feed* button (magnifying glass icon) to search for terms within the currently selected feed. When the searched term is found, the feed is reduced to the corresponding posts. The matches are highlighted. Select the magnifying glass icon to start the search. To reset the search and display the entire feed, select the X icon next to the selected search term.

Subscribe to feed

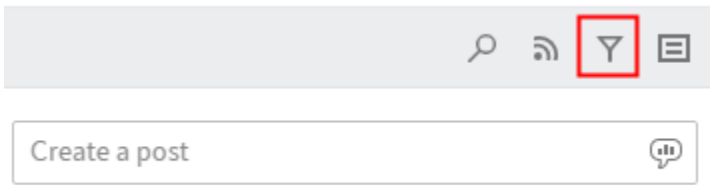


🔍 📡 🏠 📄

Create a post 🗨️

Use the *Subscribe* button (antenna icon) to subscribe to the feed. All feeds you have subscribed to are listed in the *My ELO* work area of the ELO Web Client or the ELO Java Client. Once a post is added to one of these feeds, you also see the post in the *My ELO* work area.

Show filter options

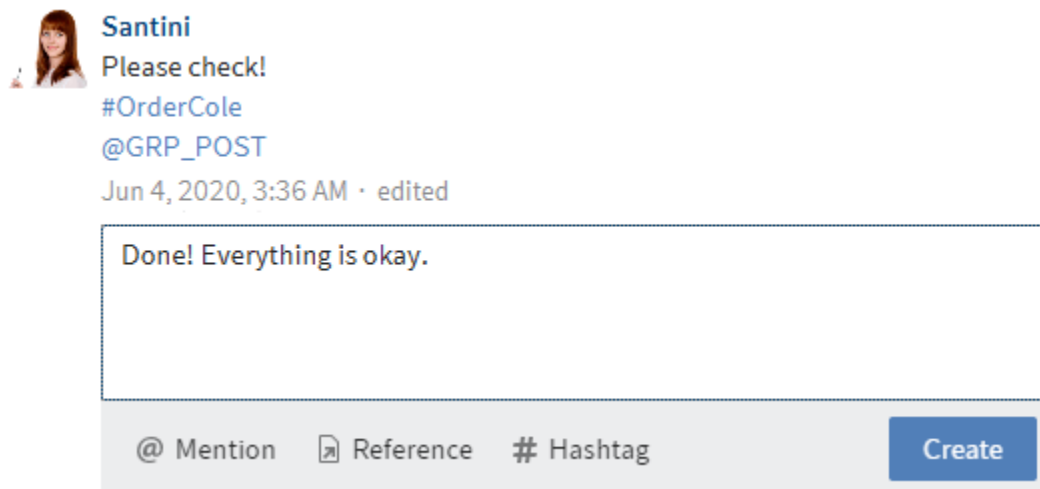


The *Show filter options* button opens a window with filters for the corresponding feed. You can use these filters to restrict the feed to posts that match the respective filter. To close the selection, select the button again.



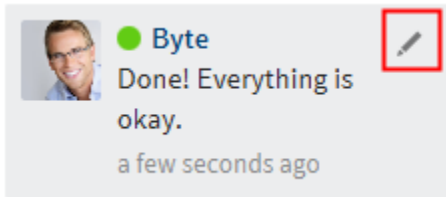
You can also see when filters are active, even when filter options are hidden.

Enter a comment



You can enter comments on any post. The procedure for adding a comment is almost identical to creating a post. However, the visibility settings for a comment are bound to the visibility settings for the commented post, which is why you are unable to change the visibility settings for comments.

Edit post



Click the *Edit* button (pencil icon) to edit your own feed posts and comments.

Feed history

Edited entries are marked as *edited* below the entry. To open the editing history, select *edited*.

Create entries

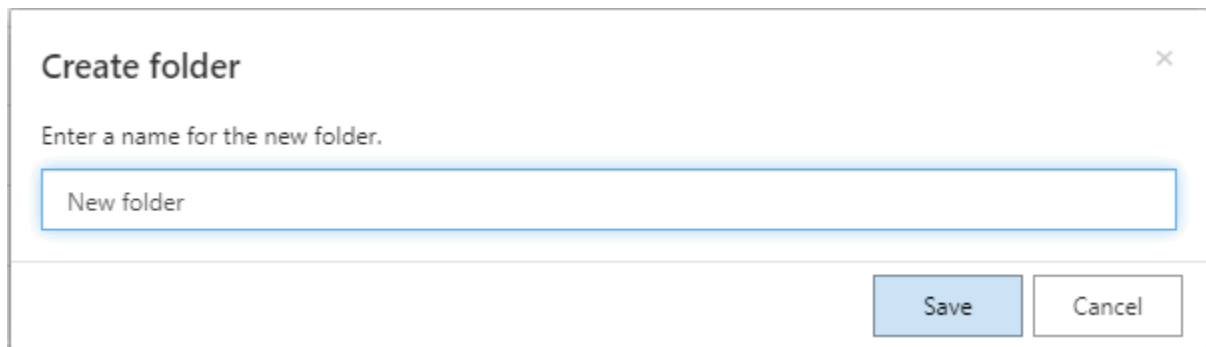
This chapter explains how to add contents to ELO. You can create new folders and insert files below the root folder.

Create folder

You can create new child folders within the root folder displayed in the ELO Integration Client.

Method

1. Open the folder where you want to create the new folder.
2. Select *Create folder*.



The image shows a 'Create folder' dialog box. The title bar contains the text 'Create folder' and a close button (X). Below the title bar, there is a prompt: 'Enter a name for the new folder.' followed by a text input field. The input field contains the text 'New folder'. At the bottom right of the dialog, there are two buttons: 'Save' and 'Cancel'.

3. Enter a name for the new folder.
4. Select *Save*.

Insert file

You have the following options for storing documents in a folder:

- *Insert file* function
- Drag-and-drop

'Insert file' function

Method

1. Select the folder where you want to store the document.
2. Select *Insert file*.

Insert file ×

Short name

Short name

File

Choose File No file chosen

Version

1

Comment

Comment

Save Cancel

3. Select *Select file*.

Alternative: Drag and drop the document into the dialog box.

The file name is automatically entered into the *Short name* field. You can change the short name and version and enter a comment.

4. Select *Save*.

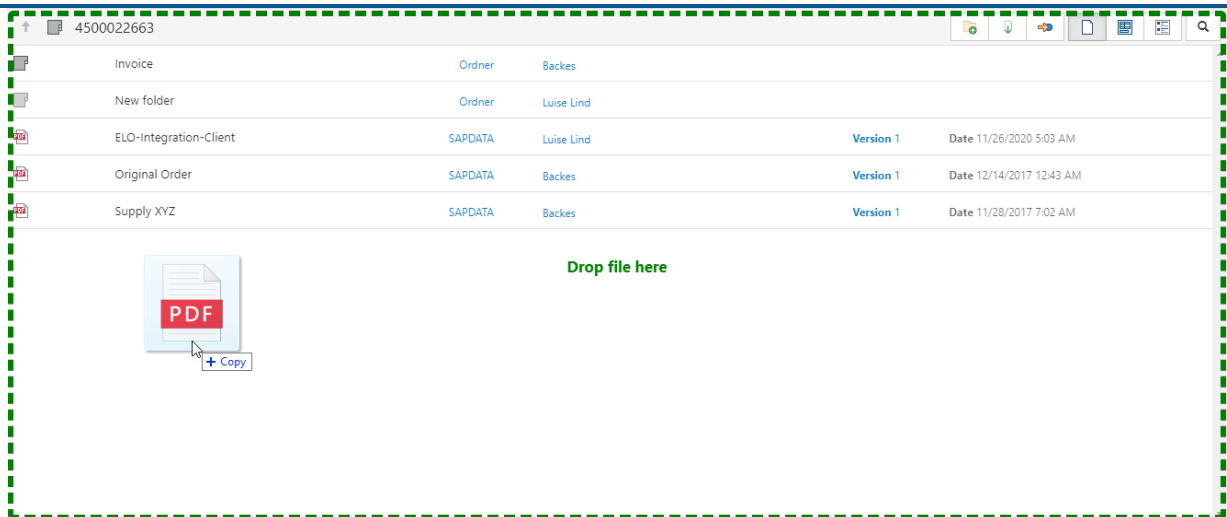
Result

The document is filed with the metadata form defined in the configuration. If your administrator has configured a form for this metadata form, you can enter metadata in the *Form* view.

Drag-and-drop

Method

1. Select the folder where you want to store the document.
2. Click the document you want to file and drag it to the folder holding down the mouse button.



3. Release the mouse button.

Insert file ✕

Short name

File

Version

Comment

The file name is automatically entered into the *Short name* field. You can change the short name and version and enter a comment.

4. Select *Save*.

Result

The document is filed with the metadata form defined in the configuration. If your administrator has configured a form for this metadata form, you can enter metadata in the *Form* view.

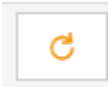
Update entries

A document filed to ELO can be changed unless it has been configured otherwise.

You have the following options for updating a document:

- *Edit in Microsoft Office* function (Microsoft Office documents only)
- *File as new version* function

Use the *Refresh* button to apply changes recently made by other users.



Edit in Microsoft Office

If you want to edit Microsoft Office documents, open them using the *Edit in Microsoft Office* function.

Method

1. Select the document you want to edit.
2. Select *Edit in Microsoft Office*.

The document is opened in Microsoft Office. While you are working on the document, it is locked for other users. This prevents multiple people from being able to make changes to a document at the same time.

When you are finished working on the document, you do not have to check it back in. Once you save the document in Microsoft Office, the changes are saved in ELO.

3. After you have saved the changes, close the document in Microsoft Office.

A new version of the document is created in ELO.

File as new version

The *File as new version* function loads a file from your local file system and stores it as a new version of a document. Using this option on version-controlled documents creates a new entry in the version history and makes it the current working version. In the case of documents that are not version controlled, the previous version is overwritten.

The following options are available for filing a new version:

- *File as new version* function
- Drag-and-drop

'File as new version' function

Method

1. In ELO, select the document you want to upload a new version of.
2. Select *File as new version*.

File as new version ×

File

No file chosen

Version (last version: 1)

Comment

3. Select *Select file*.

Alternative: Drag and drop the document into the dialog box.

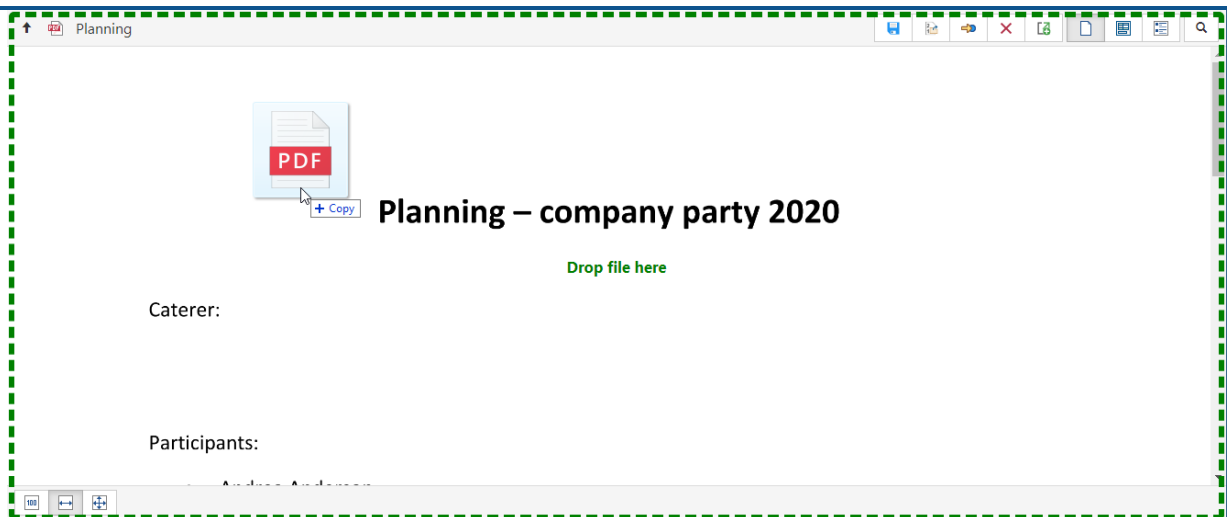
You can enter a comment on the new version.

4. Select *Save*.

Drag-and-drop

Method

1. In ELO, select the document you want to upload a new version of.
2. Click the document you want to file as a new version and drag it to the viewer pane holding down the mouse button.



3. Release the mouse button.

File as new version ×

File

Version (last version: 2)

Comment

You can enter a comment on the new version.

4. Select *Save*.

Create tasks

Tasks help you keep your processes organized. In the ELO Integration Client, you can create new tasks (workflows). To do so, use the *Start workflow* function.

Method

1. Select the entry in ELO you want to start a workflow on.
2. Select *Start workflow*.
3. Select a workflow template.

The workflow is displayed in the ELO Java Client and ELO Web Client in the *Tasks* work area where it can be processed.

Export from ELO

Various options are available for exporting entries from ELO. This allows you to send contents to people who do not use ELO, for example.

Save entry

The *Save as* function enables you to save the currently selected document outside of ELO. For example, you can send documents as an e-mail attachment or view documents for which no preview is available in ELO.

Method

Select the document you want to save outside of ELO.

Result

The document is downloaded. You will find it on your local file system in the *Downloads* folder.

Create external link

The external link enables users without ELO to access documents. You can send the external link to people outside your company network, e.g. by e-mail.


Method

1. Select the document that you want to send.
2. Select *Create external link*.

Create external link ×

The external link enables users without ELO to access the document.

Available until

Mar 18, 2021 

Restrict number of downloads to

5

Create external link

Cancel

You can restrict the availability of the document:

○

- Available until: Specify a date to limit access to the document by an external user.
 - Restrict number of downloads to: This option lets you determine how often the document can be downloaded using the external link.
3. In the dialog box, select *Create external link*.

You can copy the link or click the *Send by e-mail* button to go straight to your e-mail program and send the link.

Open in ELO

To use functions that are not available in the ELO Integration Client, you can open entries in the ELO Web Client or ELO Java Client assuming you have one of the programs installed and have the corresponding permissions.

Method

1. Select the entry you want to open in another ELO client.
2. Select *Open in ELO*.

The entry will open in a new window in ELO. Depending on the configuration, the entry will open either in the ELO Java Client or in the ELO Web Client.

Search and reference entries

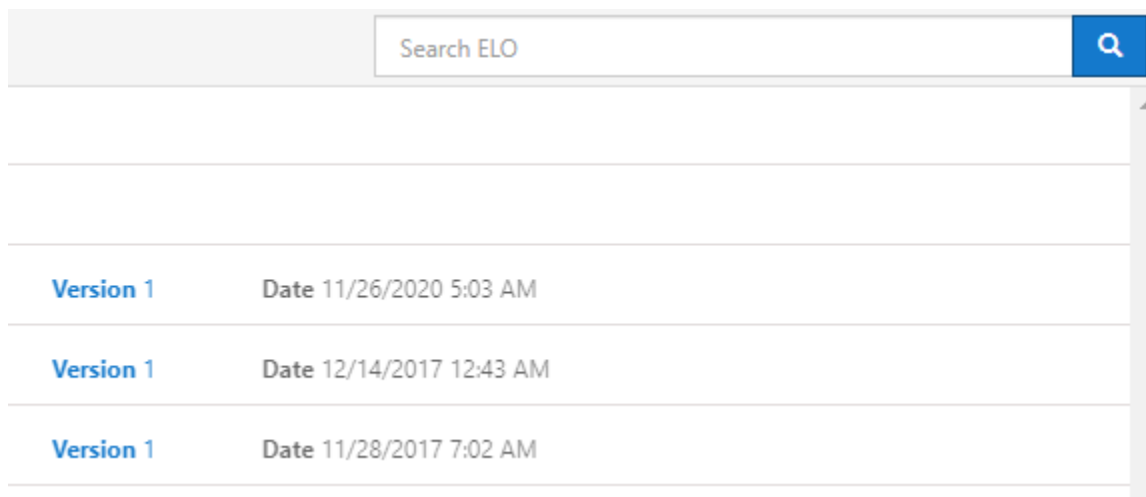
You can search the entire ELO repository with the ELO Integration Client. For example, you can create a reference to an entry in the root folder.

A reference is a link between a copy of an original document. The document only exists once physically in ELO. All changes to the document automatically apply to the references. This prevents duplicates.

For example, if you have purchase order stored in the root folder, you can create a reference to the associated invoice in another folder in ELO.

Method

1. Select the magnifying glass icon in the ELO Integration Client.

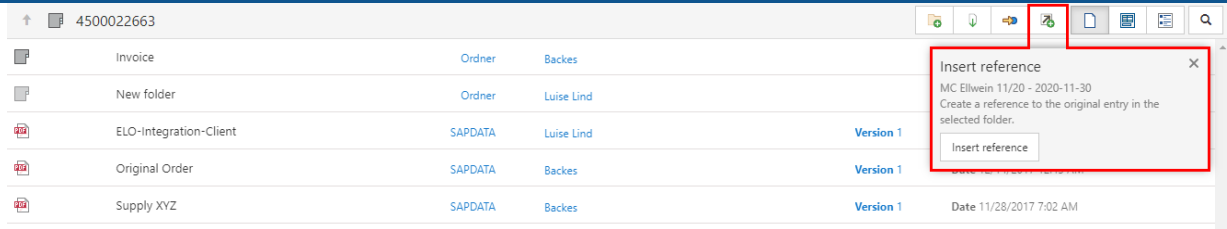


2. Enter a search term.
3. To start the search, select the magnifying glass icon or press the ENTER key.



The search results are listed.

4. Select the entry you want to reference.
5. Select the *Reference* function.



The *Insert reference* dialog box opens. The view switches from the search results to the root entry.

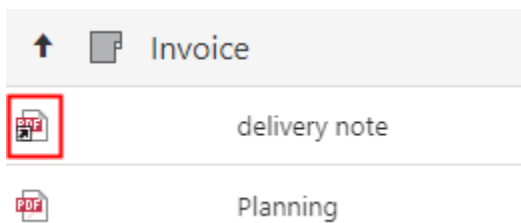
You can insert the reference into the root folder or one of the child folders.

To insert the reference into a child folder, select the desired folder.

6. Select *Insert reference*.

Result

The reference is created in the selected folder. An arrow icon indicates that it is a reference.



Delete entries

You can also delete folders and documents that you no longer need.

Warning

The entries are not deleted permanently. They are hidden and marked for deletion. This tells the administrator that the documents need to be removed from ELO permanently.

Method

1. Select the entry you want to delete.

Please note

Once you select the *Delete entry* function, the entry will be deleted immediately and without confirmation.

2. Select *Delete entry*.

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Foreword

The "ELO Integration Service for Business Central" implements the ELO Integration Client right in your ERP system. Using the ELO Integration Client within Microsoft Dynamics 365 Business Central requires an ELO installation. Following installation, the ELO Integration Client is available as an additional area in configured views of Microsoft Dynamics 365 Business Central. When calling this application, a configurable path is created in the ELO system, assuming one doesn't already exist, and displayed in the ELO Integration Client. The ELO Integration Client is a customizable single-page web application that adds select ECM functions to the target system (in this case Microsoft Dynamics 365 Business Central).

ELO Output Link for Business Central files your outgoing documents or documents created in Microsoft Dynamics 365 Business Central in configurable structures in the ELO system, including metadata. Using ELO Output Link for Business Central requires the ELO Integration Service for Business Central.

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6. Duration of the agreement

1. This EULA will come into force on the effective date. The Licensee is entitled to use the applications and the documentation for an indefinite period. This does not affect the legal right to revoke the rights granted free of charge. In particular, the Licensor is entitled to revoke the license in the event of significant breaches of contractual obligations by the Licensee. This applies in particular if the applications are distributed or modified, unless explicitly permitted under the terms of this license. Any attempt to take any such actions is void, and will automatically terminate your rights under this license.
2. In the case of termination of the license, the Licensee must delete the applications, in particular the original data carrier, any backup copies and application files installed on the network system and return the documentation. The Licensor is entitled to demand an affirmation in lieu of an oath regarding deletion of the application.

7. Compensation for breach of contract

The Licensor expressly declares that the Licensee shall be liable for all losses incurred by the Licensor arising from copyright infringements by the Licensee in breach of this Agreement.

8. Modifications and updates

The Licensor is entitled to create updates to the program at its discretion. However, the Licensee does not have a legal entitlement to such updates (see section 2).

9. Privacy

The applications do not collect, process, or store personal data. Personal data is therefore not submitted to third parties. In addition, the applications have no function that records personal data (device number or phone number, etc.) in the background or tracks user behavior.

10. Technical support

The Licensor provides technical support services Monday to Friday from 9 a.m. to 5 p.m. CET. The technical support services can be utilized via Jira support (customer portal: <https://eloticksy.elo.com/>) or by sending an e-mail to psupport@elo.com.

The Licensor provides technical support at its own discretion. It is the sole responsibility of the Licensee to back up all existing data, software, and programs. The Licensor reserves the right to refuse, suspend or cancel any technical support at its own discretion.

11. Disclaimer of warranties

1. The applications are provided free of charge; liability for defects in quality and defects in title, especially with regard to accuracy, correctness, freedom from intellectual property rights of third parties, completeness and/or usability, is ruled out except in cases of intent or fraud and is subject to legal provisions (section 518 et seq. German Civil Code (BGB)).
2. Although the Licensor makes every effort to keep the applications virus-free, it is unable to guarantee that the application is free of viruses. The Licensee must, for its own protection, take the necessary steps to ensure appropriate security measures and shall utilize a virus scanner to ensure that no viruses are uploaded before downloading the applications.

12. Limitation of liability

1. The Licensor shall be liable for all damages incurred by the Licensee due to gross negligence or willful misconduct by the Licensor or resulting from culpable acts that lead to injury to life, limb or health in so far as there is liability on the Licensor's part, or if they were concealed with intent or in cases where the Licensor is liable under the German Product Liability Act. In all other cases, the Licensor is only liable for damages resulting from breaches of material contractual obligations. Material obligations are those obligations whose fulfillment is necessary for the proper execution of the agreement and which the Licensee can expect to be fulfilled. Liability on the part of the Licensor for loss of data is limited to the typical cost of

recovery that would have been incurred had regular data backups been made. We refer in this regard to your duty to back up data regularly (see section 3 paragraph 9).

2. In the event of a negligent breach of contractual obligations by the Licensor, the Licensor's liability is limited to foreseeable, typical damages.
3. The above limitations of liability shall also apply in respect of all representatives of the Licensor, in particular with respect to its managing directors, legal representatives, employees, and other agents.

13. Obligation of confidentiality and duty of care

Both parties to the Agreement shall not divulge any trade or business secrets, data or documents that they become aware of through their business relationship either during or after the term of the Agreement. Trade and business secrets include the names of the clients of the holder of rights and the agreed terms and conditions of sale.

14. Miscellaneous

1. In the event that a provision of this EULA should be wholly or partly invalid or unenforceable, the validity of the remaining provisions shall remain unaffected. This does not apply if compliance with the remaining provisions would constitute an undue hardship for either party to the agreement, including when taking into consideration fall-back laws or regulations to close the legal loophole.
2. Changes and adjustments to this License Agreement must be made in writing.
3. The applications are provided by and are the responsibility of the Licensor. The applications take into account the requirements of the respective country in which the Licensor is based. The Licensor assumes no responsibility if the applications, information, and/or documentation is viewed or downloaded outside of this country. If the Licensee accesses the application, information and/or documentation from locations outside the country, the Licensee is solely responsible for complying with the laws and regulations of that particular country. Accessing the applications, information and/or documentation from countries where this is illegal is prohibited.

15. Final provisions

1. The courts of Stuttgart shall have jurisdiction. This jurisdiction also applies in the case of non-commercial users subject to the German Code of Civil Procedure and the Brussels I Regulation.
2. The agreement shall be governed exclusively by the laws of the Federal Republic of Germany with exclusion of the UN Convention on Contracts for the International Sale of Goods.

ELO Digital Office GmbH

Tübinger Str. 43

70178 Stuttgart, Germany

+49 711 806089-0

info[at]elo.com