

Within 1-2 business days

Activation

1. Official Order / License Purchase

Please send the signed quotation to your personal InLoox contact person, either directly or via your purchasing department.

2. Account Activation

Your personal InLoox contact person will convert your test account into a productive account (including any existing project data) and activates the ordered number of user licenses on the agreed date.

3. Invoice Delivery

If you use a separate email address for invoice processing, please let us know. Otherwise, the invoice will be sent to the email address used to create the account.

Within 1-2 weeks

Technical Setup

InLoox Cloud editions (optional)

Technical setup session

- Participants from InLoox: InLoox Support
- Participants from your side: InLoox Administrator & M365 Administrator
- Duration: approx. 1 hour

Setup as required, e.g.:

- ✓ Single-Sign-On / Microsoft login
- ✓ Installation of the Outlook Add-in, Teams Add-in, InLoox Desktop Tools
- ✓ Connection of SharePoint Online as document storage

InLoox On-Prem edition (mandatory)

Technical setup session

- Participants from InLoox: InLoox Support
- Participants from your side: InLoox Administrator & IT department & M365 Administrator (if applicable)
- Duration: approx. 1.5 hours

Setup as required, e.g.:

- ✓ Server Setup
- ✓ Single-Sign-On / Microsoft login
- ✓ Installation of the Outlook Add-in, Teams Add-in, InLoox Desktop Tools
- ✓ Connection of SharePoint Online or File Server as document storage

Within 2-4 weeks

Key User Onboarding

Content-focused setup session

- Participants from InLoox: InLoox Expert
- Participants from your side: InLoox Administrator & Key User
- Duration: approx. 1-2 hours

Initial configuration of:

- ✓ User permissions
- ✓ Notifications
- ✓ Structures (e.g. categories)

Clarification of customer-specific processes

Best practices

Tip: We also provide a free [online help center](#) and a wide range of [video tutorials](#).

available at any time upon request

End User Training

Optional advanced end user training sessions

Examples:

- ✓ General InLoox training for groups or individual users
- ✓ Task management training for groups
- ✓ Dashboard and reporting workshop

Available both on-site and online

Further information and pricing can be found on our website under [Training](#).