

Actionstep — Integrate, Configure & Create Transactions

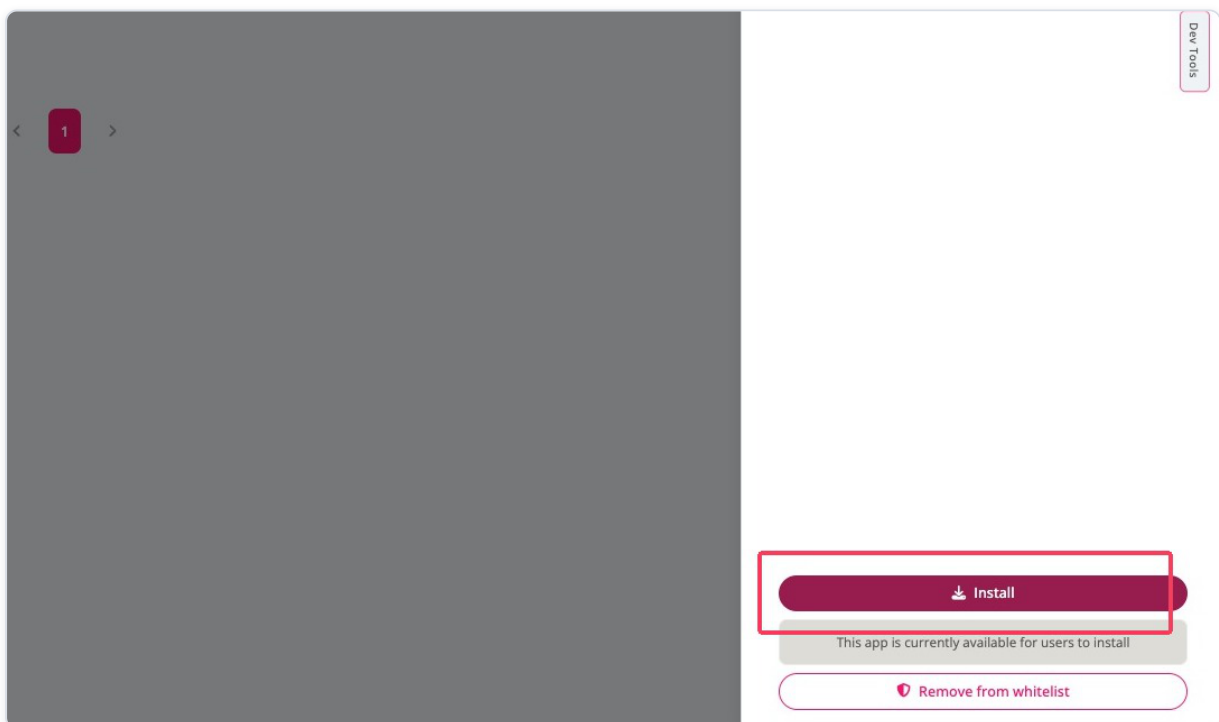
INT-04 · Version 1.1

The Actionstep integration works in two directions: import Actionstep matters into easyAML as transactions, and open easyAML directly from a matter with the “Open in easyAML” button. Setup happens once (install, role mapping, Actionstep permissions); after that, staff create transactions straight from their matters.

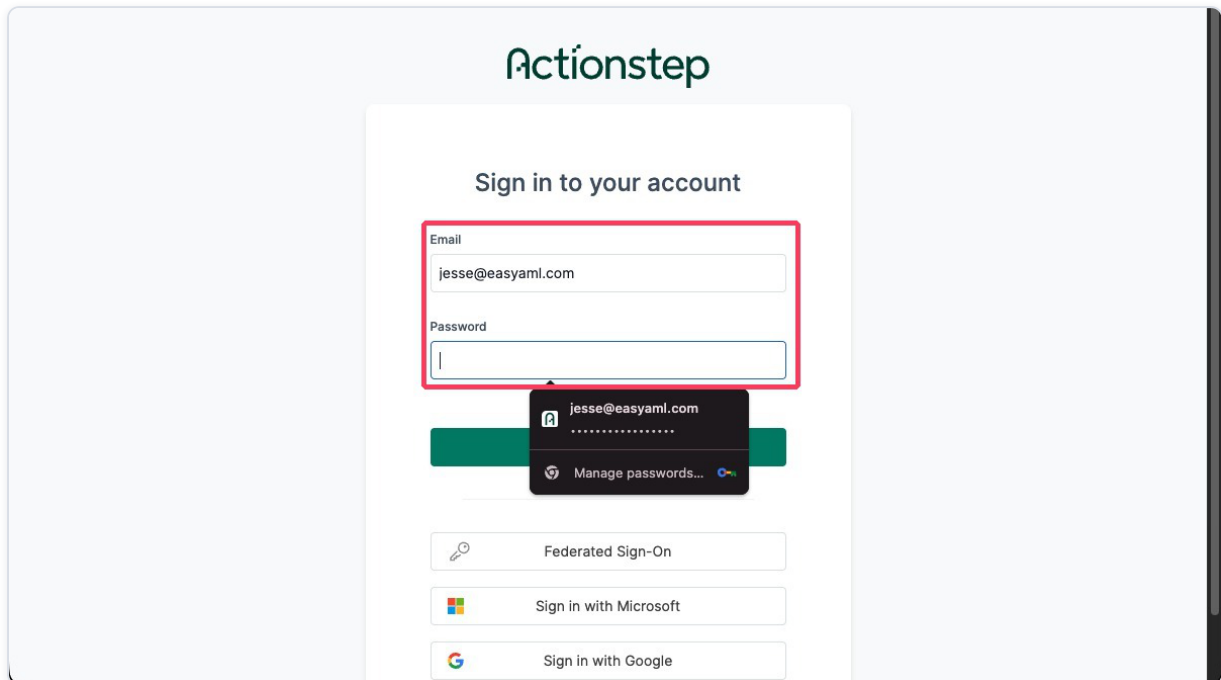
OPEN TO START <https://app.easyaml.com/apps>

Part 1 — Install and authorise

- 1 In easyAML, open **Apps → Marketplace**, search for **Actionstep**, and click **Install**.

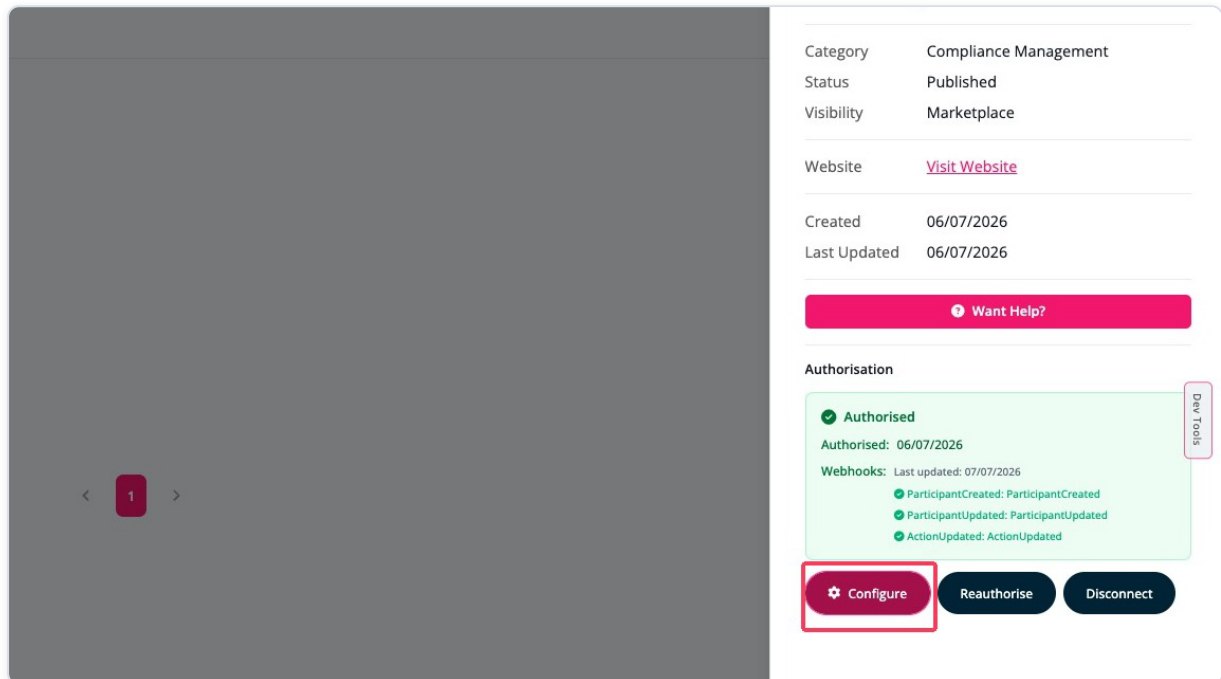


- 2 Click **Authorise Actionstep** — an Actionstep login window opens. Sign in and **Grant access**. This authorises easyAML to act on your behalf, and adds an easyAML custom data collection to each Matter Type.



Part 2 — Configure the mapping

- 1 Click **Configure** and review the account settings. Tasks can be created to remind Actionstep users of important easyAML actions, and **disbursements** can be raised in Actionstep matters when KYB/KYC costs are incurred.



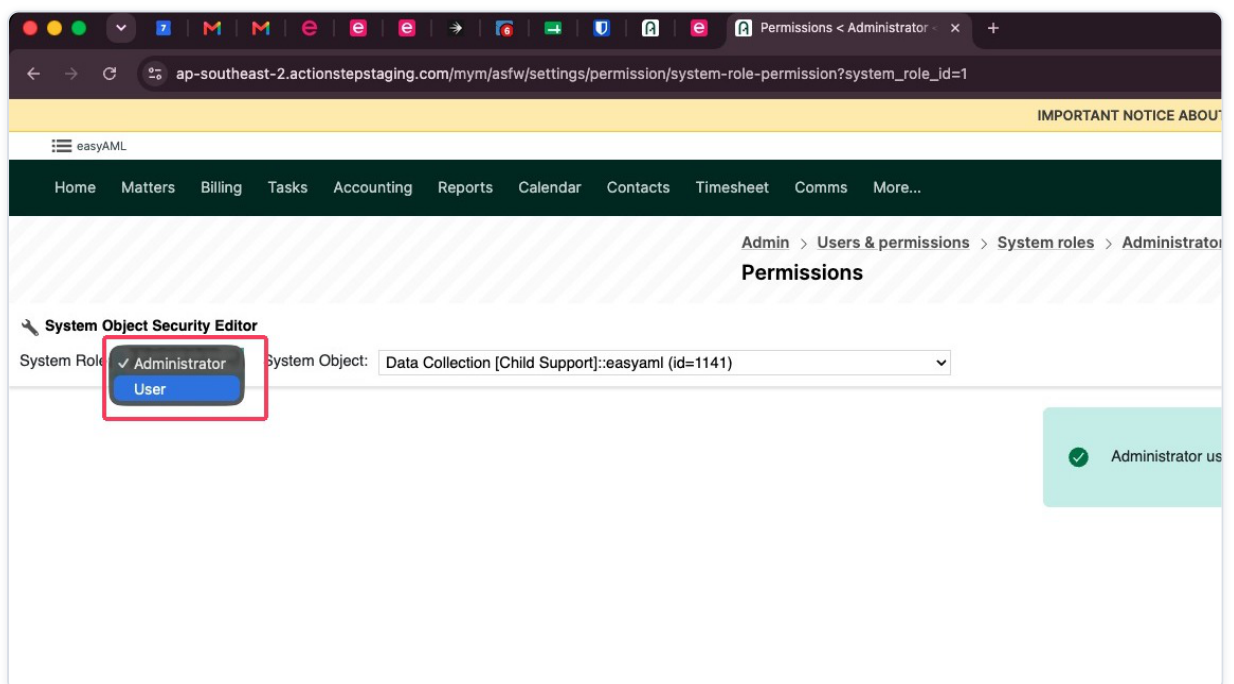
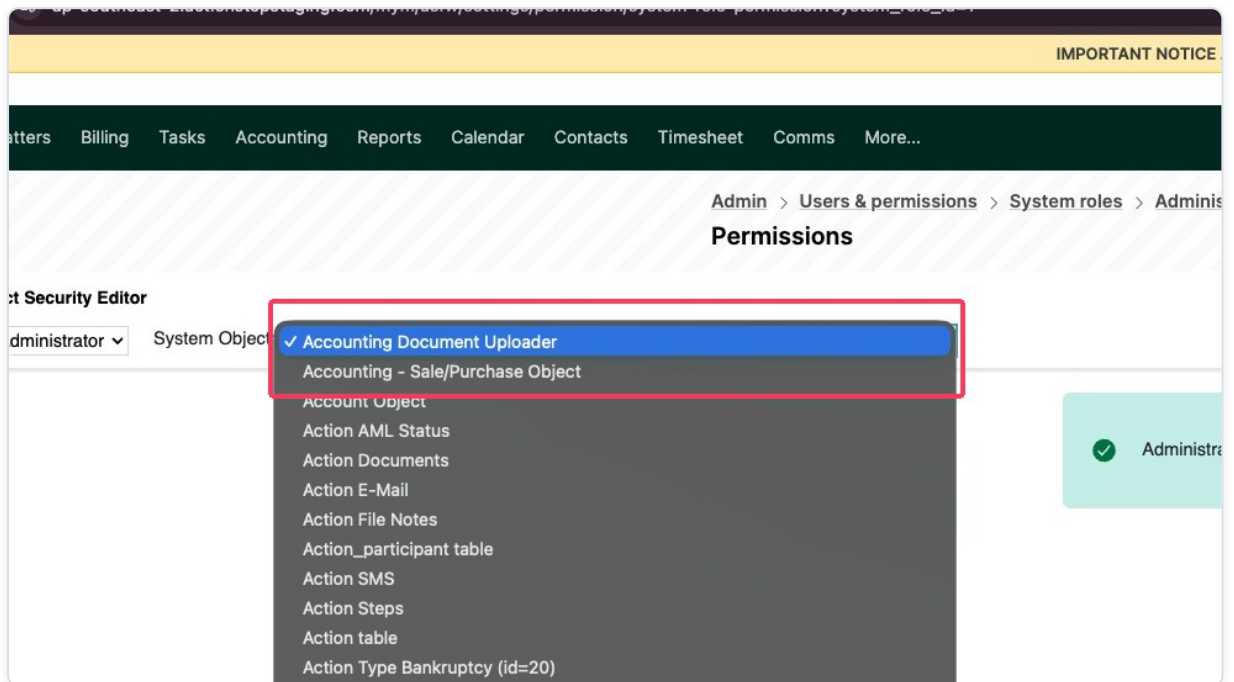
- 2** Map **participant roles to transaction roles** — this controls which matter participants are imported. For participant types that never need AML, choose **Exclude from AML**. Click **Continue** — the mapping applies to all users on your account.

ACTIONSTEP PARTICIPANT ROLE	Transaction Role
Bank	Client
Accountant	Client
Bookkeeper	Client
Client	Client
Client_Primary_Contact	Client
Court	Client

Part 3 — Enable the easyAML panel in Actionstep

A few permission steps inside Actionstep make the easyAML data collection (and its “Open in easyAML” button) visible:

- 1 In Actionstep's permissions, open the **System Object** dropdown. For each “Data Collection [Matter Type]::easyaml” collection: set **System Role** to “User”, enable the **can_read** permission, and save. Repeat for each Matter Type relevant to AML — others can be skipped.



- 2 For Actionstep's built-in AML status fields: open **Action AML Status**, enable **can edit action aml status** and **can_set_action_aml_status_to_complete**, then **Save**. (The settings page links Actionstep's own step-by-step guide for these fields.)

Part 4 — Import a matter as a transaction

- 1 From easyAML: **Transactions** → **Import Transactions**, search and select the matter, choose which entities to import (select/deselect all in the top-right), set the **Legal Entity Type** and **Transaction Type** that best match the matter, and click **Import transaction**.

Import Transactions

Search and import transactions, properties, or matters from your connected apps.

Blah Sale Select all Select none

Review the 3 entities that will be imported alongside this transaction.

Transaction type *

Select a transaction type

Choose a transaction type to import

Actionstep didn't provide a type. Choose one before importing.

☒

Conveyancers (SA) Pty Ltd

ABN/ACN 48 103

Client x

Roles

+ Add role v

ABR match: (ABN 4810) 0% match

Legal entity type

Other v

Ask Gemini

Work

Example Financial Services
Global Admin

3 of 5 tasks

Export PDF

7 Jul 2026 Risk ●●● Medium Edit details

Reference	Blah-001
Value	0.00 AUD
Source	Not specified

Change Lead Entity

Edit Details

Report to AUSTRAC

Log Unusual Activity

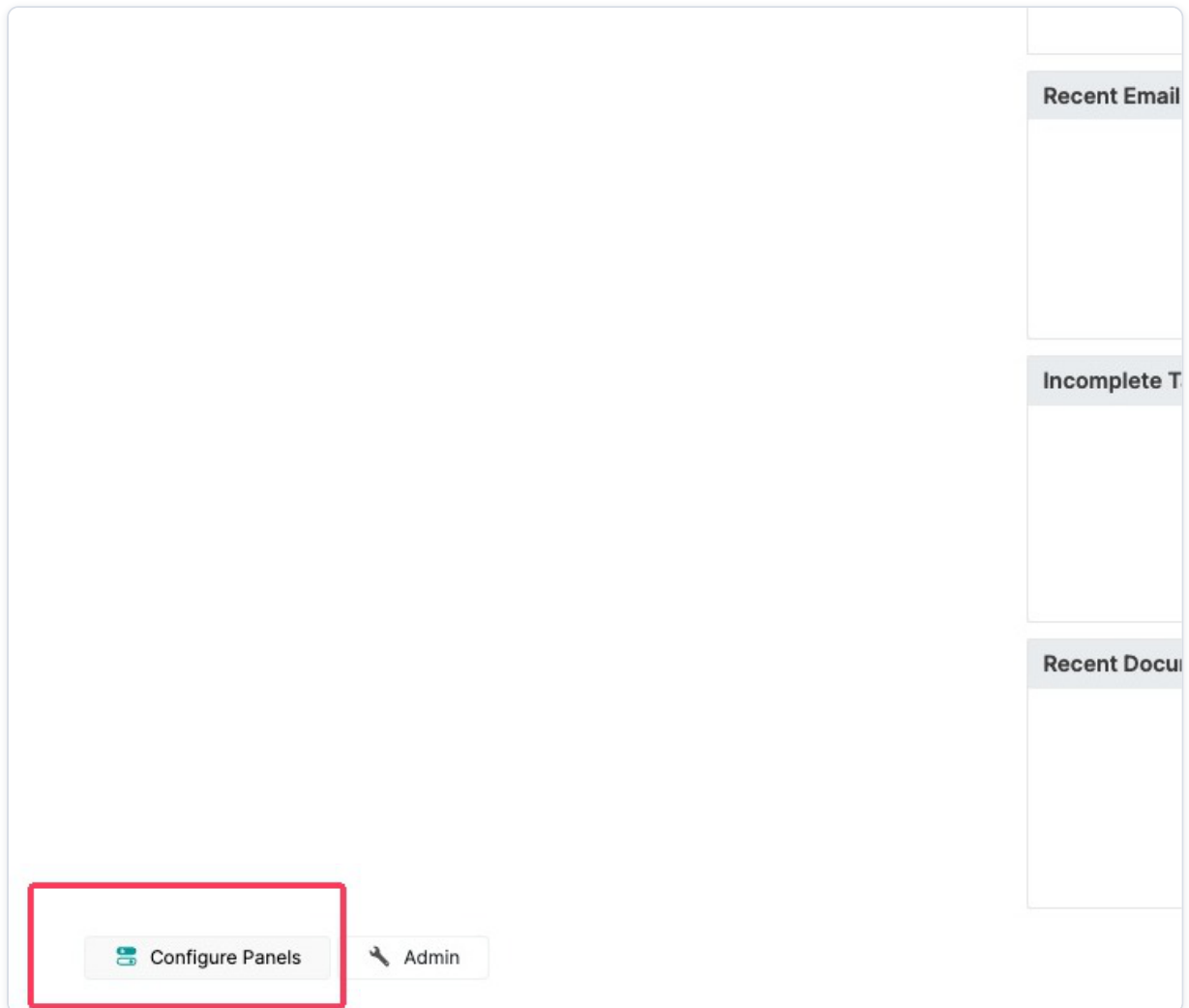
Sign off

Archive

Dev Tools

Part 5 — Or start from the matter (“Open in easyAML”)

- 1 In a matter of a relevant type, click **Configure Panels** at the bottom of the page and tick the **easyAML** checkbox under Custom Data.



Configure Panels

Admin

Configure Your Panels

Add or remove panels from your personal layout. **NOTE:** this will apply for all Matters.

ACCOUNTING

☐ Action Ledger

☐ Purchase Summary

☐ Receipts & Disbursements

☐ Sale Summary

BILLING

☐ Disbursements

☐ Time Billing Invoice History

☐ Time Billing Summary

☐ Time Billing To Invoice

CUSTOM DATA

☐ matter_info

☐ easyAML

GENERAL

☒ Matter Calendar Appointments

☒ Recent File Notes

☐ Parties

☒ Parties (detailed)

☐ Progress

☒ Recent Documents

☐ Related Matters

☒ Incomplete Tasks

MESSAGING

☒ Recent Email

- 2 Click **Open in easyAML** in the matter panel — easyAML opens in a new tab. Select the **Transaction type**, review the individuals and legal entities to be imported (untick any that shouldn't come across), and click **Import transaction**.

Import Transactions

Search and import transactions, properties, or matters from your connected apps.

Purchase of 15 Knebworth Avenue

Select all Select none

Review the 1 entity that will be imported alongside this transaction.

Transaction type *

Select a transaction type

Choose a transaction type to import

- Residential property transaction
- Commercial property transaction
- Property transfer between related parties
- Off-the-plan property purchase
- Property development / subdivision
- Property option agreement

Cancel

Import transaction (+1 entities)

Search and import transactions, properties, or matters from your connected apps.

Purchase of 15 Knebworth Avenue

Select all Select none

Review the 1 entity that will be imported alongside this transaction.

Transaction type *

Residential property transaction

Actionstep didn't provide a type. Choose one before importing.

☒ Fleckermanns Conveyancers (SA) Pty Ltd

ABN/ACN 48 103 085 856

Roles

Client x

+ Add role v

Already in your account — will be linked

Cancel

Import transaction (+1 entities)

- 3** You're redirected to the imported transaction. **Open in Actionstep** deep-links back to the connected matter — and each imported entity or individual carries its own link back to the matching Actionstep contact.

Import Transactions

Search and import transactions, properties, or matters from your connected apps.

Purchase of 15 Knebworth Avenue

Select allSelect none

Review the 1 entity that will be imported alongside this transaction.

Transaction type *

Residential property transaction|

Actionstep didn't provide a type. Choose one before importing.

Fleckermanns Conveyancers (SA) Pty Ltd

ABN/ACN 48 103 085 856

Client x

Roles

+ Add role v

Already in your account — will be linked

Cancel

Import transaction (+1 entities)

Parts 1–3 are one-time setup by an administrator. Day to day, staff only use Part 4 or Part 5.

More ways to get help

- **In-platform:** the “Want Help?” button on each page opens the relevant walkthrough.
- **Knowledge Base:** <https://knowledge.easyaml.com/how-to-integrate-and-configure-actionstep-with-easyaml>
- **Video walkthrough:**
https://scribehow.com/o/PKpOki2kThyzGwDRLEXASw/viewer/How_To_Integrate_And_Configure_Actionstep_With_easyAML_7434db90