

Working with Apps and the Marketplace

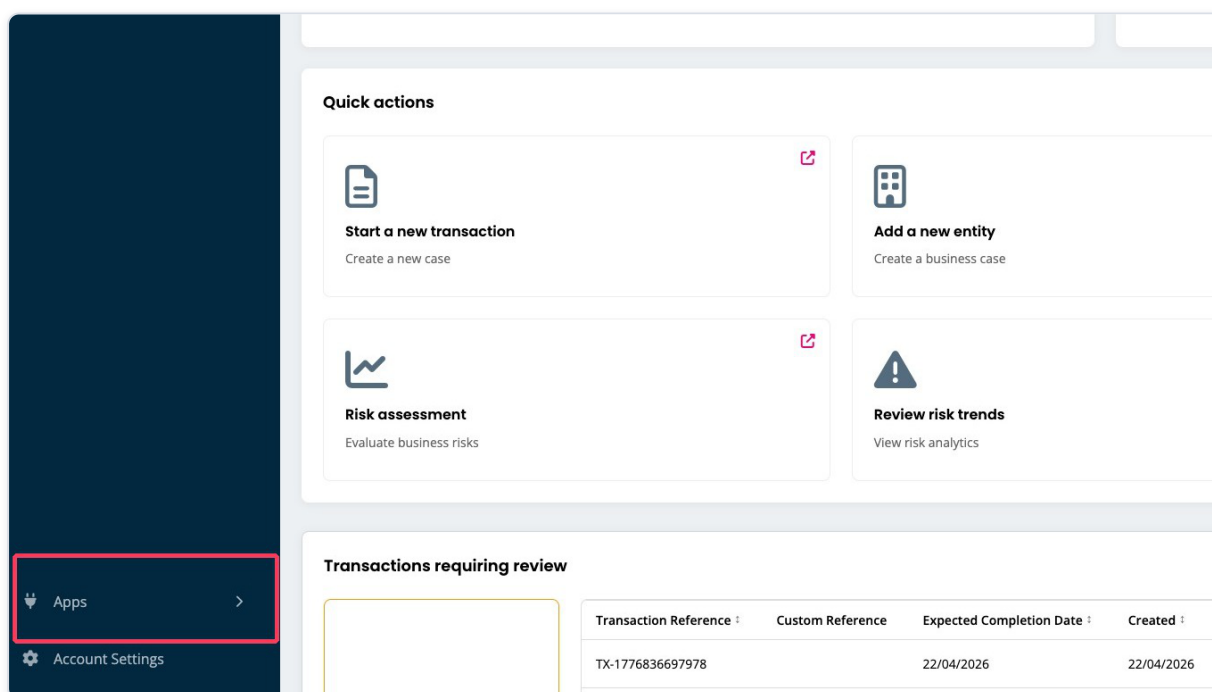
INT-07 · Version 1.1

The Apps page is where you connect your existing management software to easyAML. This guide covers browsing the Marketplace, the two kinds of apps and how each connects, and what to do if the tool you use isn't there yet — we're always open to adding new integrations based on what customers need.

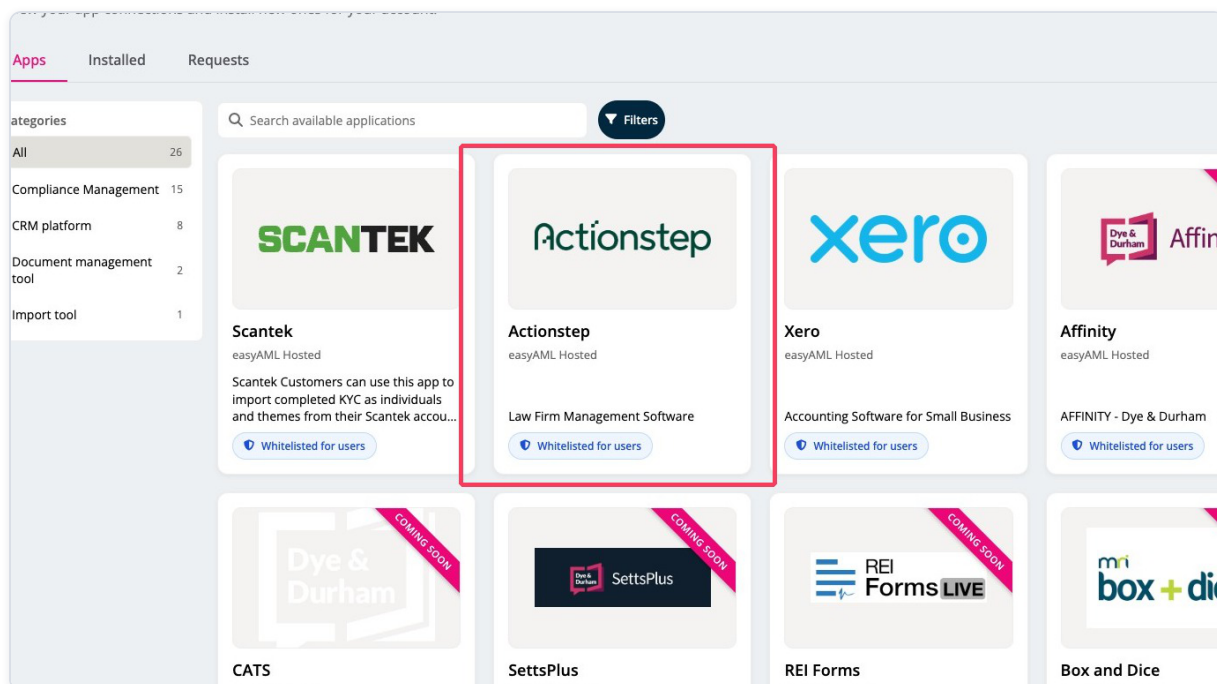
OPEN TO START <https://app.easyaml.com/apps>

Browse and install

- 1 From anywhere in the platform, open the **Apps** menu on the left, then click **Marketplace** to see all the tools you can connect.

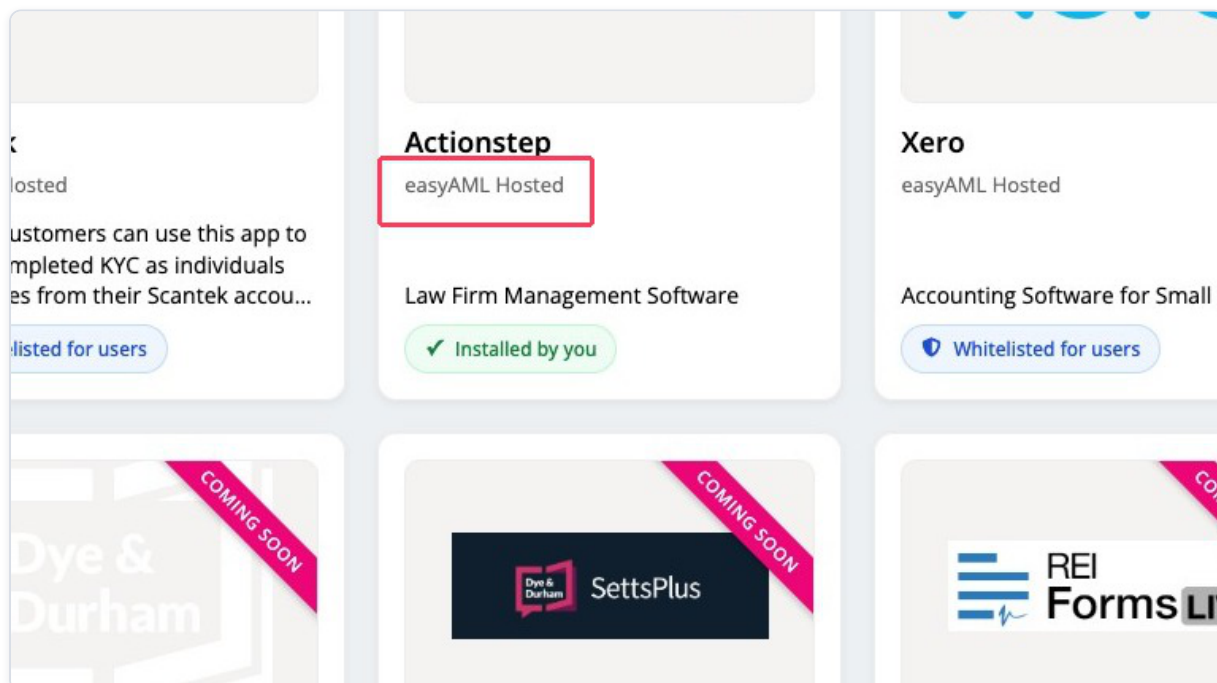


- 2 Browse the tiles (or search) and pick the platform you'd like to link with your account.

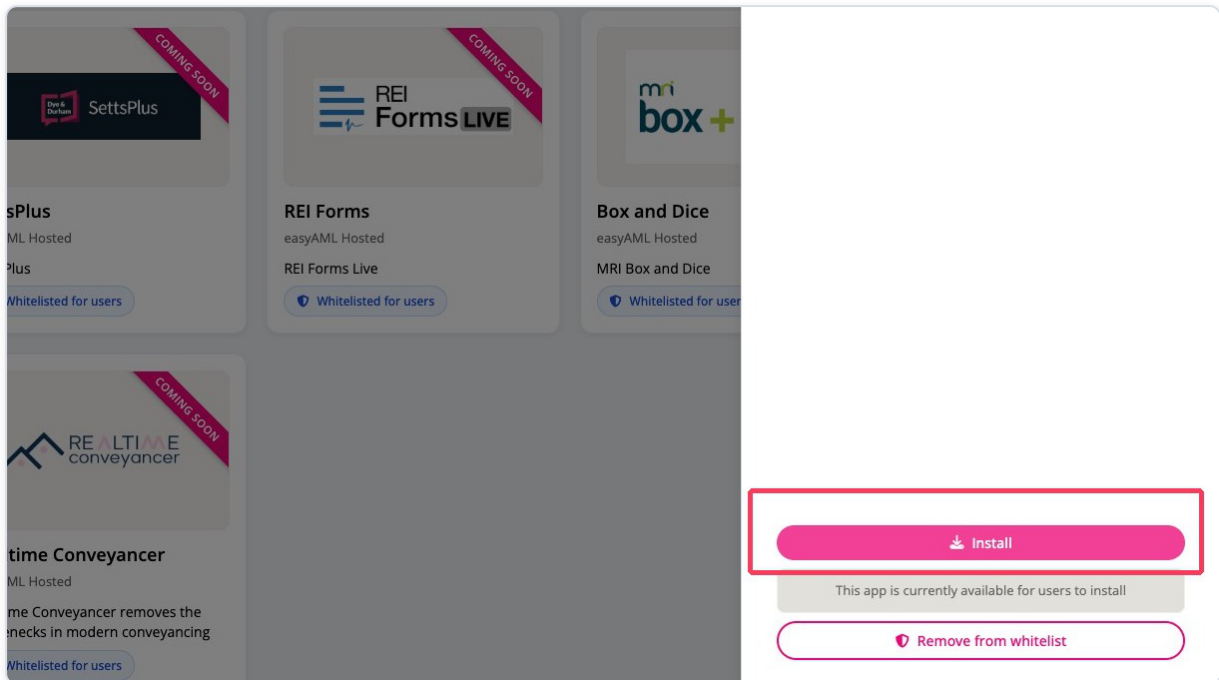


easyAML Hosted apps — connect from inside easyAML

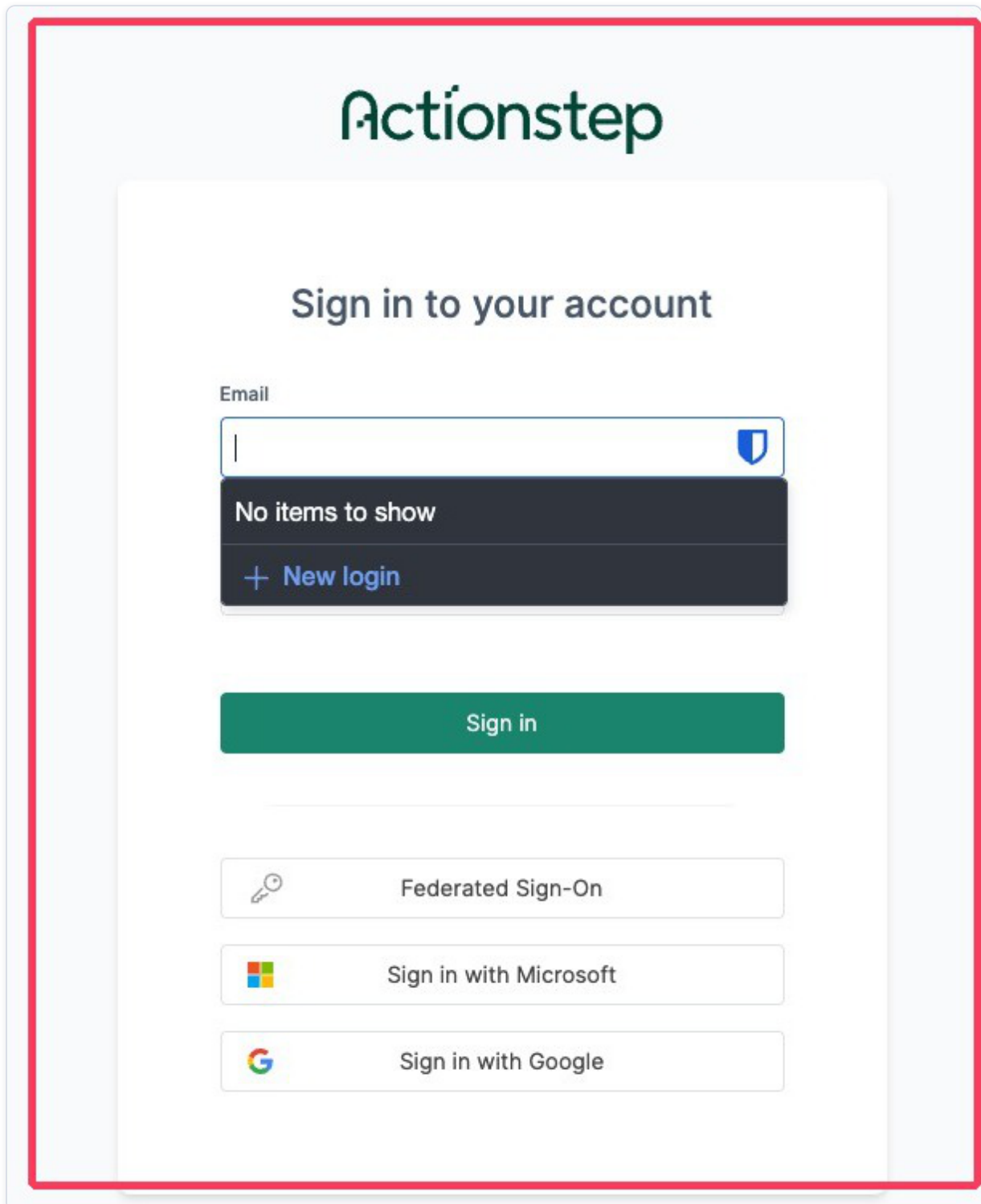
- 1 Apps marked **easyAML Hosted** connect from inside easyAML.



- 2 Click **Install** to kick off the connection, then **Authorise** to give easyAML permission to talk to your chosen platform.

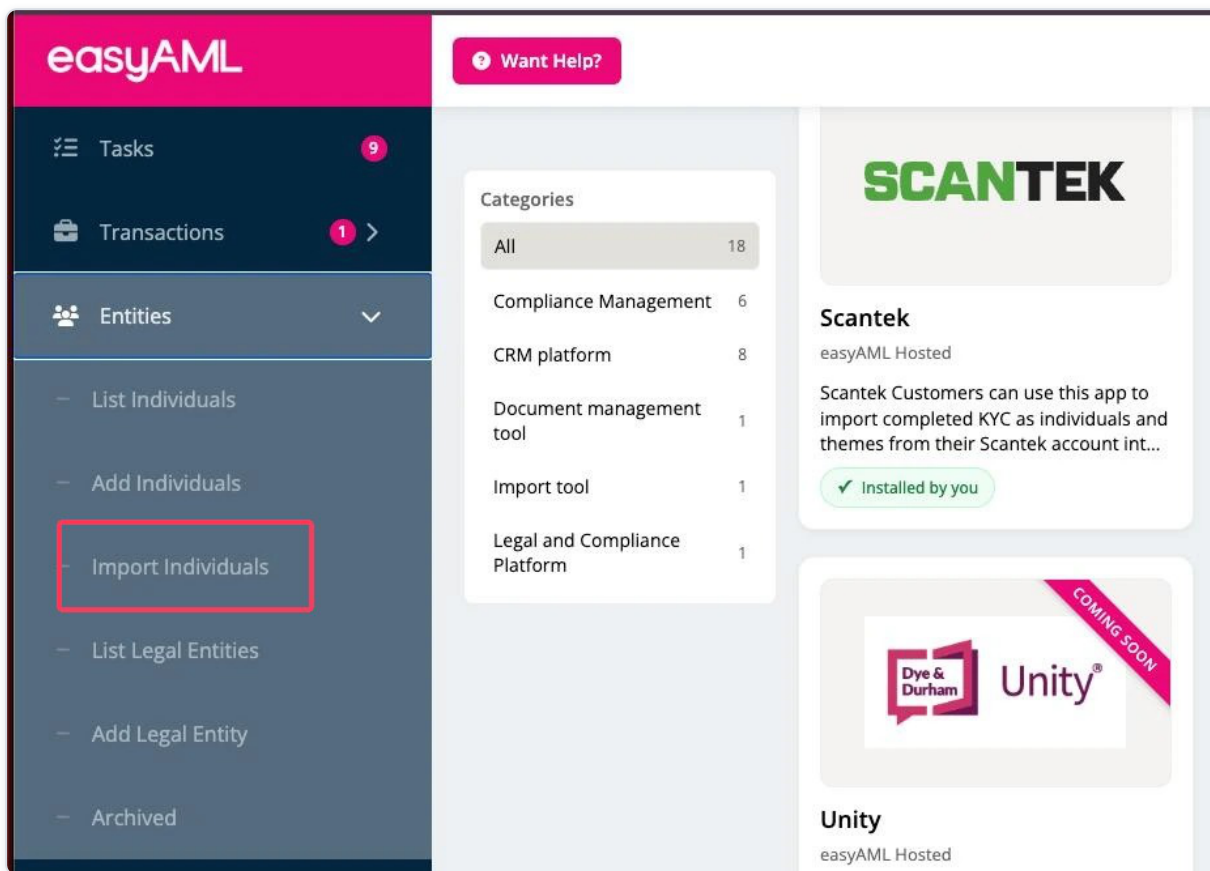


- 3 A new window asks you to log in to your management software — this simply confirms it's really you connecting the two accounts. Once you're back, the app shows as installed and ready to use.



The screenshot shows the Actionstep login page. At the top is the Actionstep logo in green. Below it is the heading "Sign in to your account". Under the heading is an "Email" label and a text input field. To the right of the input field is a blue shield icon. Below the input field is a dark grey dropdown menu with the text "No items to show" and a "+ New login" link. Below the dropdown is a green "Sign in" button. Below the button is a horizontal line. Under the line are three sign-in options: "Federated Sign-On" with a key icon, "Sign in with Microsoft" with the Microsoft logo, and "Sign in with Google" with the Google logo.

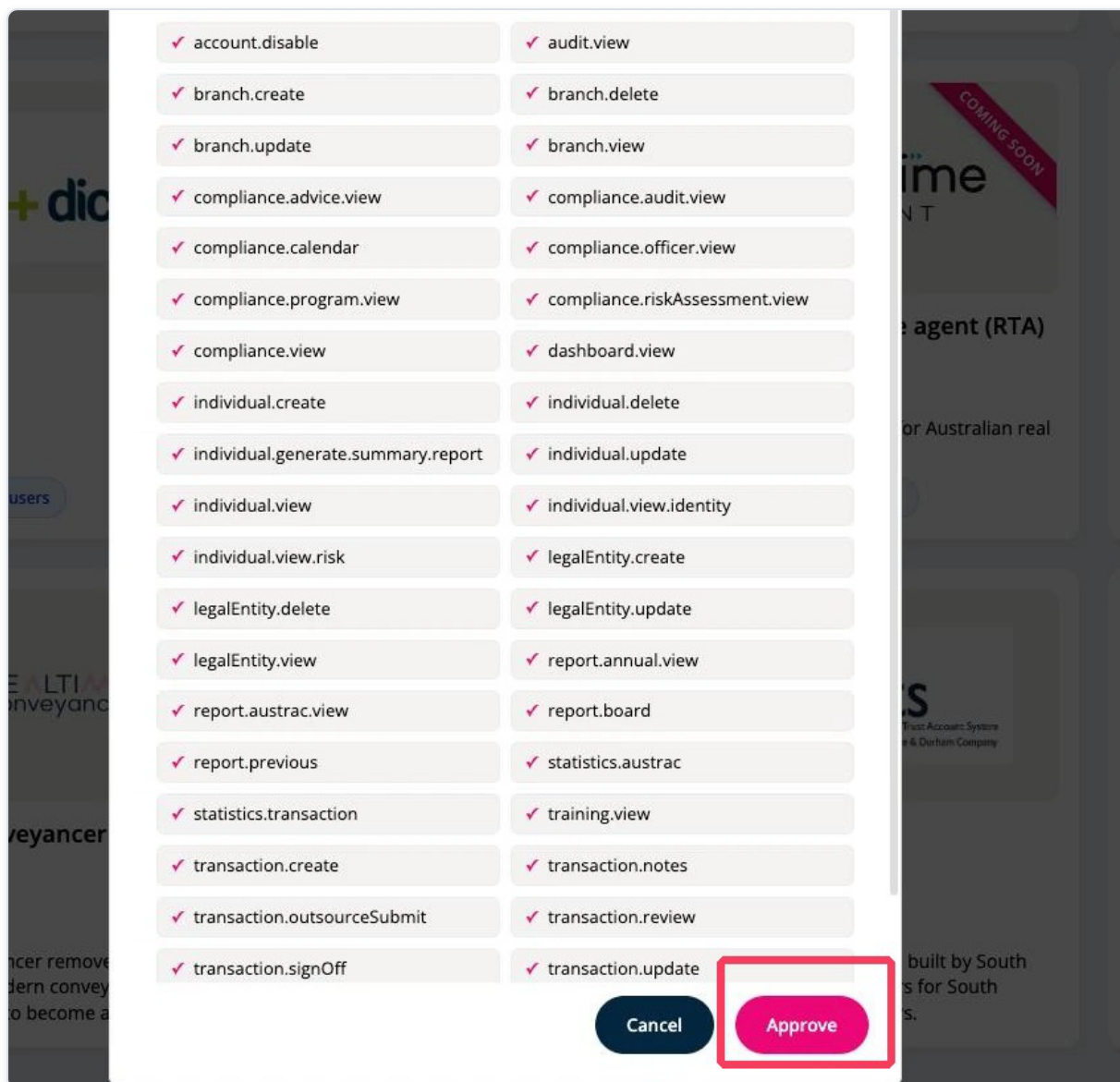
- 4 Installed hosted apps enable new menu items — **Import Individuals**, **Import Legal Entities** or **Import Transactions** — and some also add an “Open in easyAML” button inside the connected app.



3rd Party Hosted apps — approve, then connect from the other side

- 1 Apps marked **3rd Party Hosted** only require approval inside easyAML — you then connect to easyAML from within your other system.

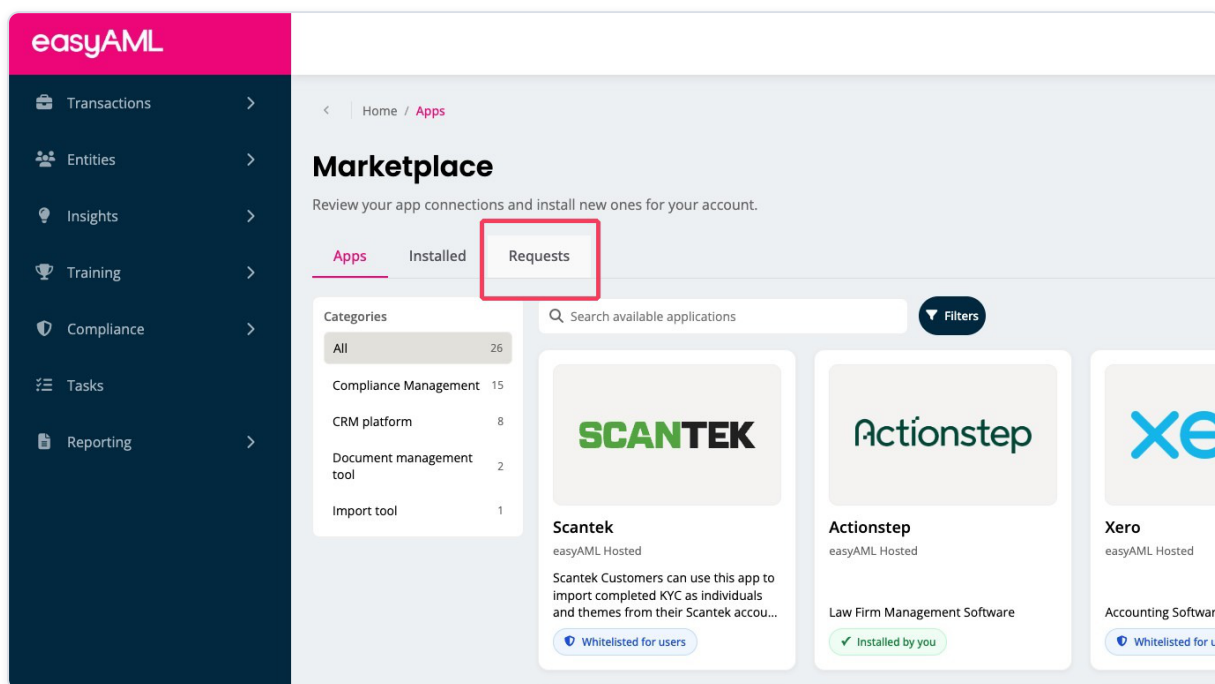
- 2 Click **Install**, then review the permissions the app is requesting and, if acceptable, **Approve**.



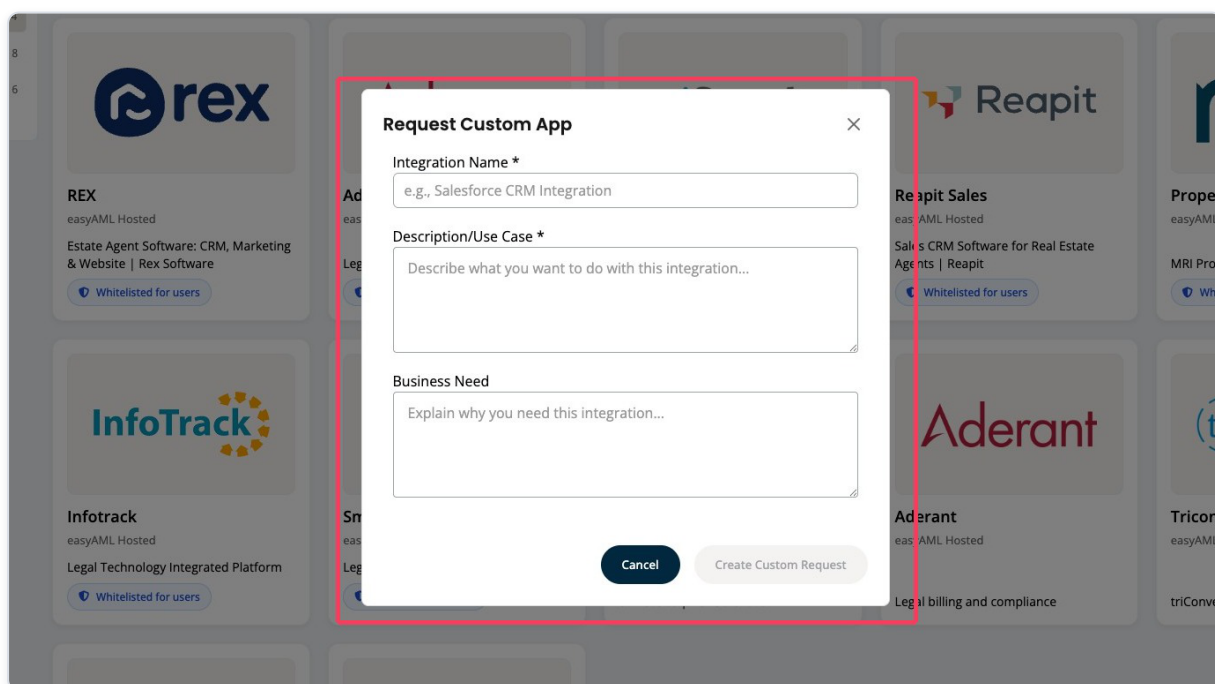
External systems cannot connect to easyAML unless an easyAML member with appropriate permissions has approved the app and the permissions it requires — approval is the security gate.

Can't see the tool you use?

- 1 Head to the **Requests** tab and click **Request Custom App**.



- 2 Fill in a few details about the platform you'd like supported — integration name, what you want to do with it, and the business need — then **Submit**. We review every request and will be in touch.



More ways to get help

- **In-platform:** the “Want Help?” button on each page opens the relevant walkthrough.
- **Knowledge Base:** <https://knowledge.easyaml.com/working-with-apps-in-easyaml>
- **Video walkthrough:** Scribe link to be added once published.