



Workflow
byEcho.ai

INSTALLATION GUIDE

*Deploy across your entire enterprise in under **5 minutes!***

ADMIN: Authorized by Echo as an app on your tenant

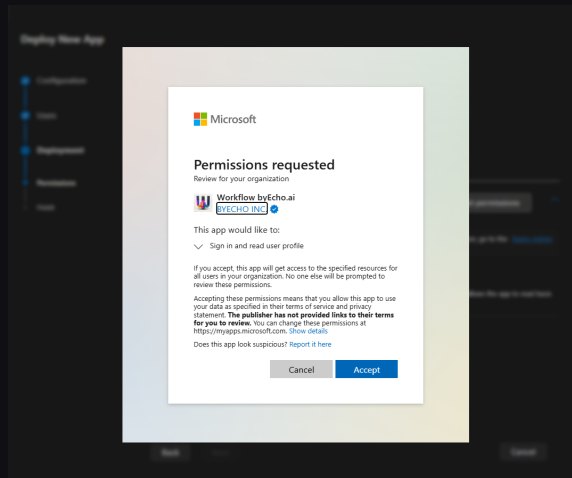
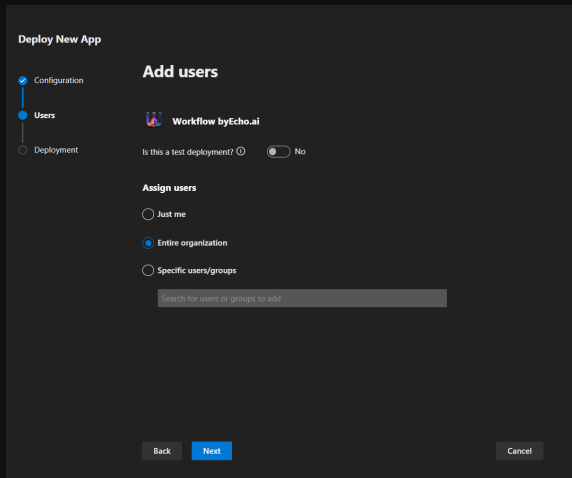
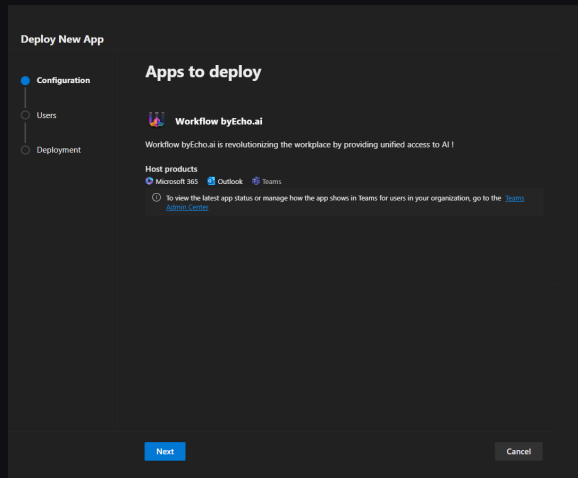
ESTIMATED TIME: 5 MINUTES

01 Go to WorkflowbyEcho.ai or approve.byecho.ai and click “get it now”

02 Click “*next*”

03 Choose who will see the app in your organisation

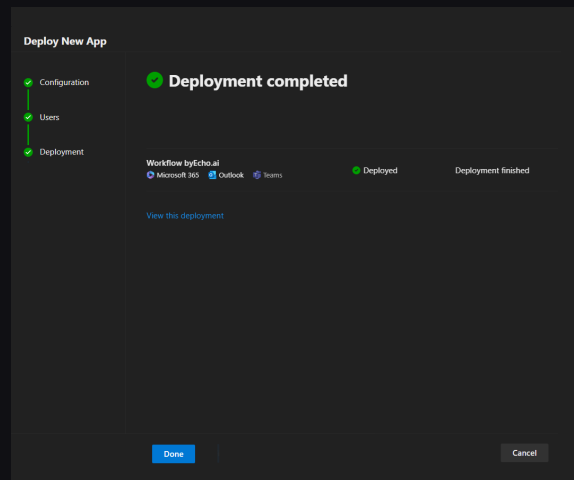
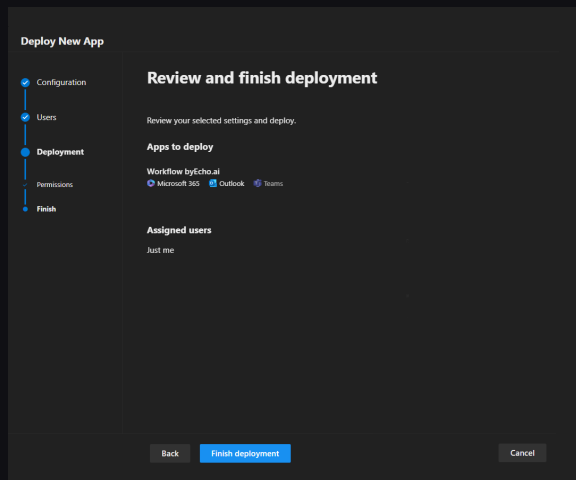
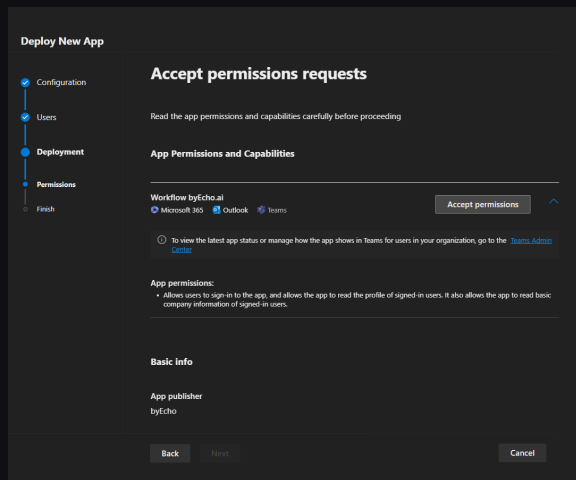
* We recommend all user since everyone can see for free



ADMIN: Authorized by Echo as an app on your tenant

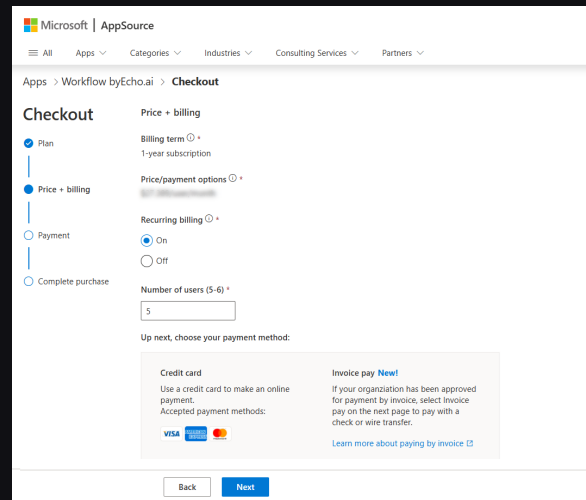
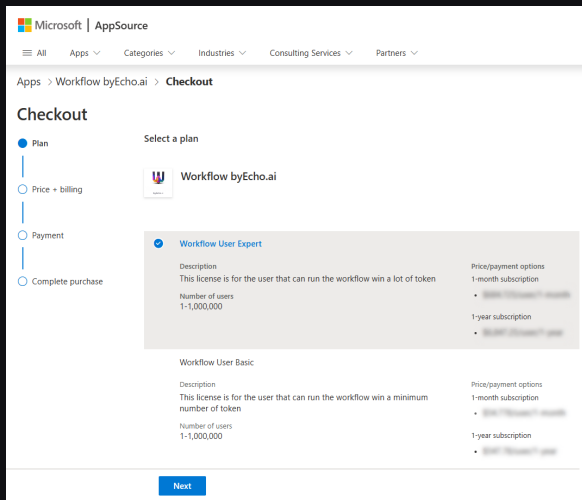
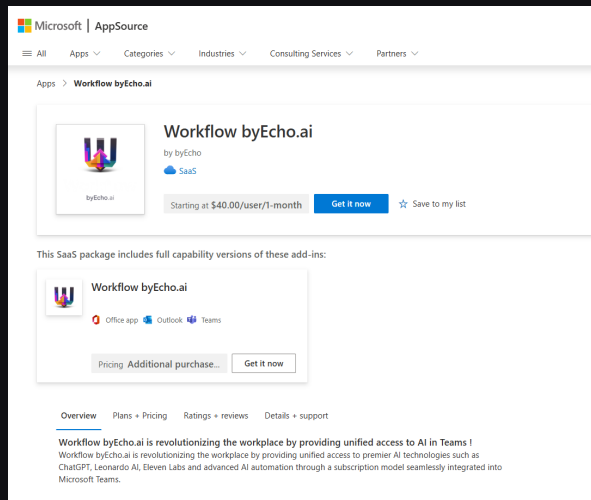
04 Accept Permission

05 Finished Deployment



ADMIN: Purchase your basic, advanced, or expert licenses

- 01 Go to [Workflow byEcho.ai](#) or [buy.byecho.ai](#) and click “*get it now*”
- 02 Choose you subscription and click “*next*”
- 03 Choose the number licence you want and click “*next*”



ADMIN: Purchase your basic, advanced, or expert licenses

04 Fill out your payment information and place the order

05 Click on “*Configure SaaS account*”

Microsoft | AppSource

All Apps Categories Industries Consulting Services Partners

Apps > Workflow byEcho.ai > Checkout

Checkout

Payment

- Plan
- Price + billing
- Payment
- Complete purchase

Product name	Price (CAD)	Quantity	Subtotal (CAD)
Workflow byEcho.ai		5	
Plan			
Workflow Starter Kit			
Billing term			
1-year subscription			
Recurring billing			
On			

Sold to address *
Enter the address of the legal entity responsible for payment and identified on the invoice. The address provided here is used to determine your tax rate.

Billing account
[Dropdown menu]
[Edit](#)

Bill to *
Select the billing profile you want to use for this purchase. You can also edit an existing profile. [Learn more about billing profiles](#)

Billing profile
[Dropdown menu]
[Edit](#) [Add new](#)

[Back](#) [Place order](#)

Microsoft | AppSource

All Apps Categories Industries Consulting Services Partners

Apps > Workflow byEcho.ai > Checkout

Checkout

Thank you for your order. Configure your SaaS account to complete the purchase

Plan

Price + billing

Payment

Complete purchase

Workflow byEcho.ai

To complete the purchase, configure your SaaS account on the publisher's website. We've sent you an email confirmation with the instructions on configuring this SaaS account.

Offer details

Offer
Workflow byEcho.ai

Plan
Workflow Starter Kit

Billing term
1-year

Price/payment options
[Blurred text]

Recurring billing ☐ On

Total
[Blurred text]

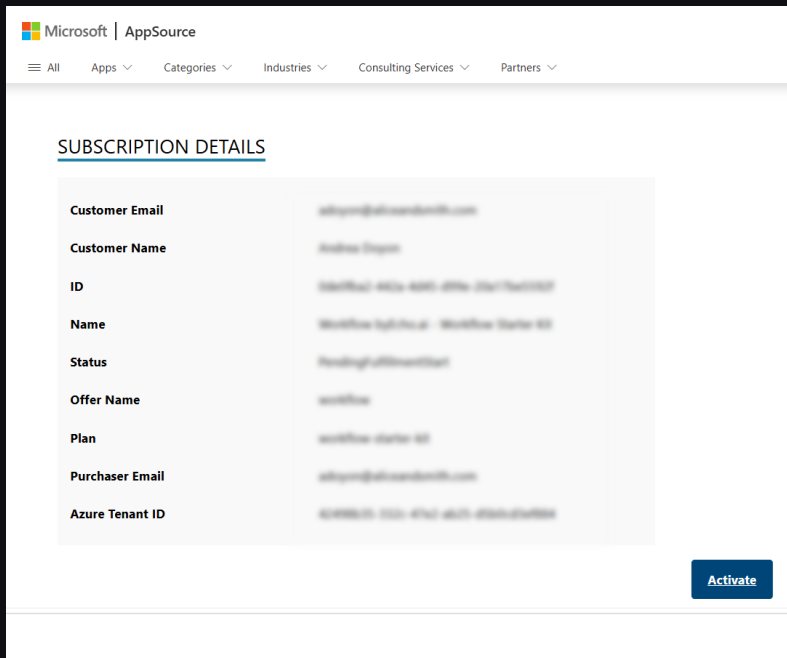
Invoice details

Sold to
[Blurred text]

[Back](#) [Configure SaaS account](#)

ADMIN: Purchase your basic, advanced, or expert licenses

06 Click on “*activate*”



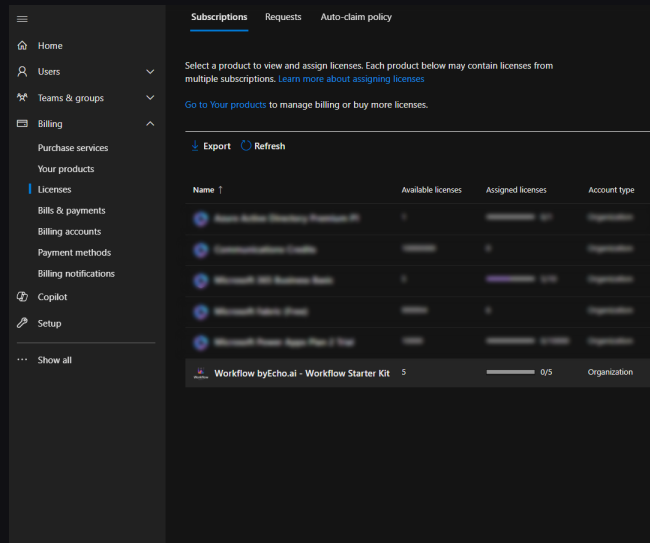
The screenshot shows the Microsoft AppSource interface. At the top, there's a navigation bar with the Microsoft logo and 'AppSource' text. Below it, a menu bar contains 'All', 'Apps', 'Categories', 'Industries', 'Consulting Services', and 'Partners'. The main content area is titled 'SUBSCRIPTION DETAILS'. It contains a table with the following information:

Customer Email	adrian@alexanderli.com
Customer Name	Adrian Degan
ID	000000-0000-0000-0000-000000000000
Name	Workflow by Echo AI - Workflow Starter Kit
Status	Pending activation
Offer Name	Workflow
Plan	Workflow Starter Kit
Purchaser Email	adrian@alexanderli.com
Azure Tenant ID	000000-0000-0000-0000-000000000000

At the bottom right of the table, there is a blue button labeled 'Activate'.

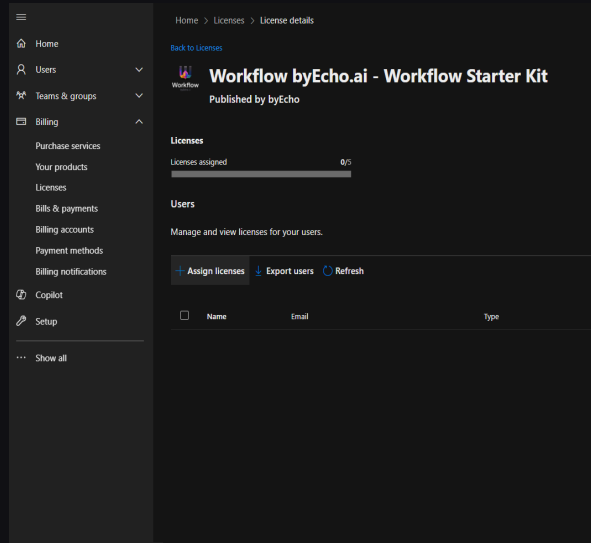
ADMIN: Assign licenses to your users like any other Office 365 licenses

- 01 Go to [Microsoft Admin](#)
- 02 Click on the “*Workflow byEcho.ai*” licenses
- 03 Click on “*+ Assign licenses*”



The screenshot shows the Microsoft Admin center interface. The left sidebar contains navigation links: Home, Users, Teams & groups, Billing, Purchase services, Your products, Licenses, Bills & payments, Billing accounts, Payment methods, Billing notifications, Copilot, and Setup. The main content area is titled 'Subscriptions' and includes a table of products. The 'Workflow byEcho.ai - Workflow Starter Kit' is highlighted at the bottom of the table.

Name	Available licenses	Assigned licenses	Account type
SharePoint Online Standard License (SPL)	1	1	Organization
Communications Credits	100000	0	Organization
Microsoft 365 Business Basic	1	1	Organization
Microsoft Teams (Free)	10000	0	Organization
Microsoft Power Apps Plan 1 (Per User)	1000	1000	Organization
Workflow byEcho.ai - Workflow Starter Kit	5	0/5	Organization



The screenshot shows the 'License details' page for 'Workflow byEcho.ai - Workflow Starter Kit'. The page includes a 'Licenses' section with a progress bar showing '0/5' licenses assigned. Below this is a 'Users' section with a table for managing licenses for users.

Licenses

Licenses assigned: 0/5

Users

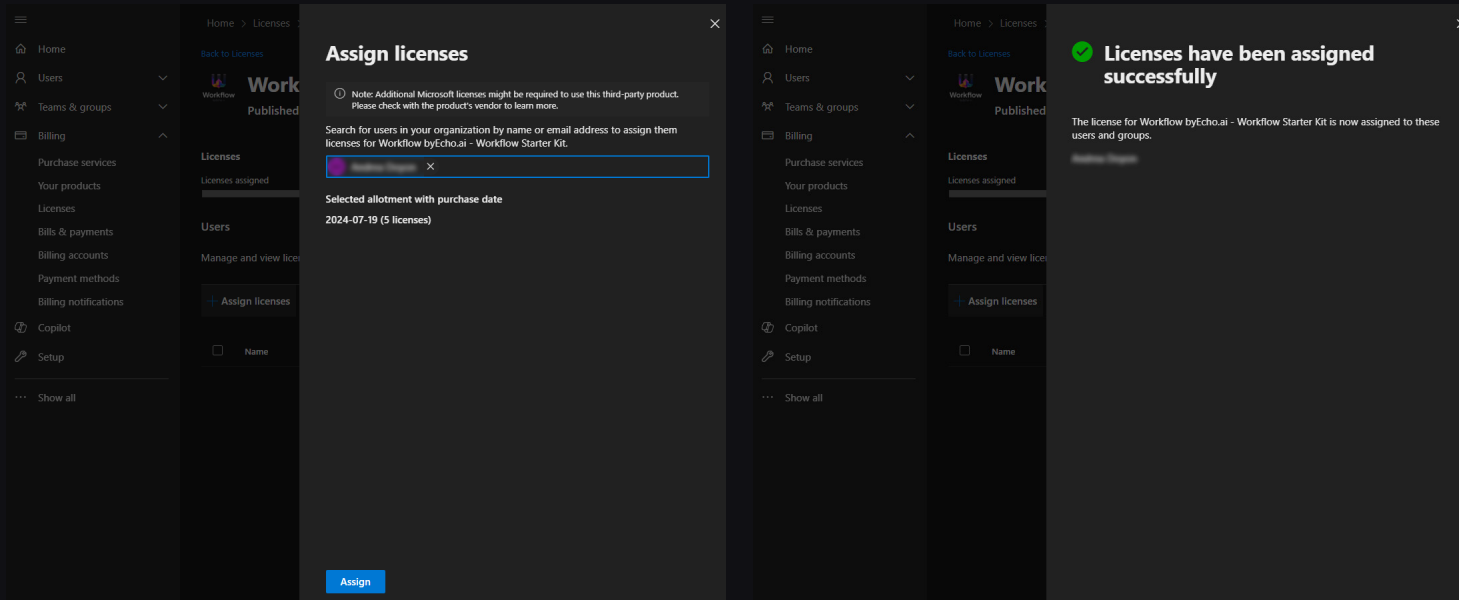
Manage and view licenses for your users.

[+ Assign licenses](#) [+ Export users](#) [Refresh](#)

☐	Name	Email	Type
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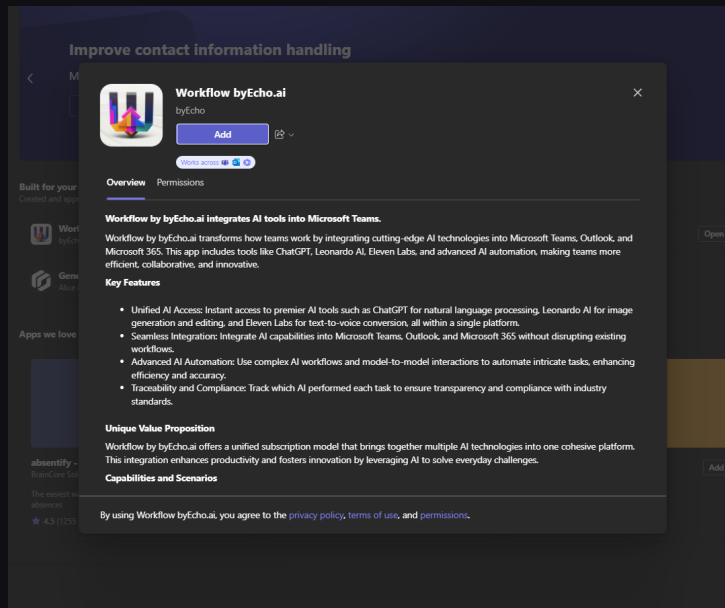
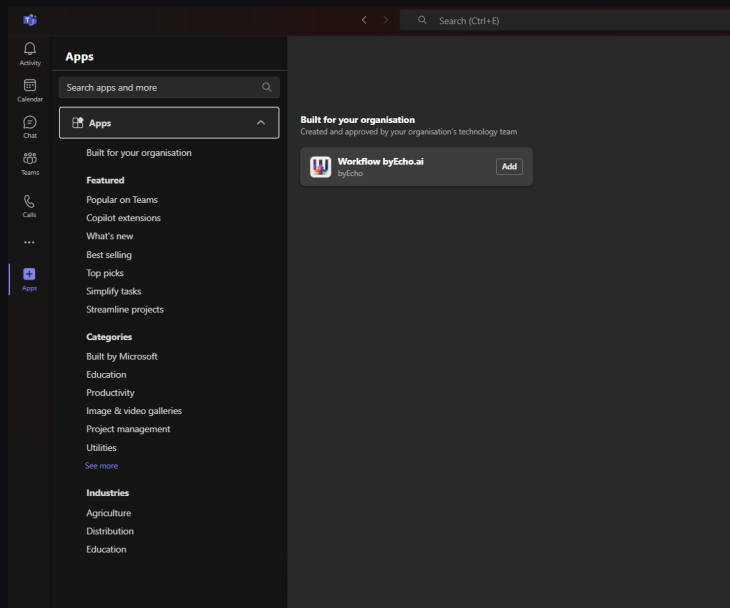
ADMIN: Assign licenses to your users like any other Office 365 licenses

04 Choose the email of the user you want to assign the license to and click *“Assign”*



USER: Adding your app in Teams

- 01 In Microsoft Team, clicks on the App tab and search “*Workflow byEcho.ai*”
- 02 Click “*Add*” - Note that as an admin, you can also pin the app for a user or a group





Workflow
byEcho.ai

Thank you