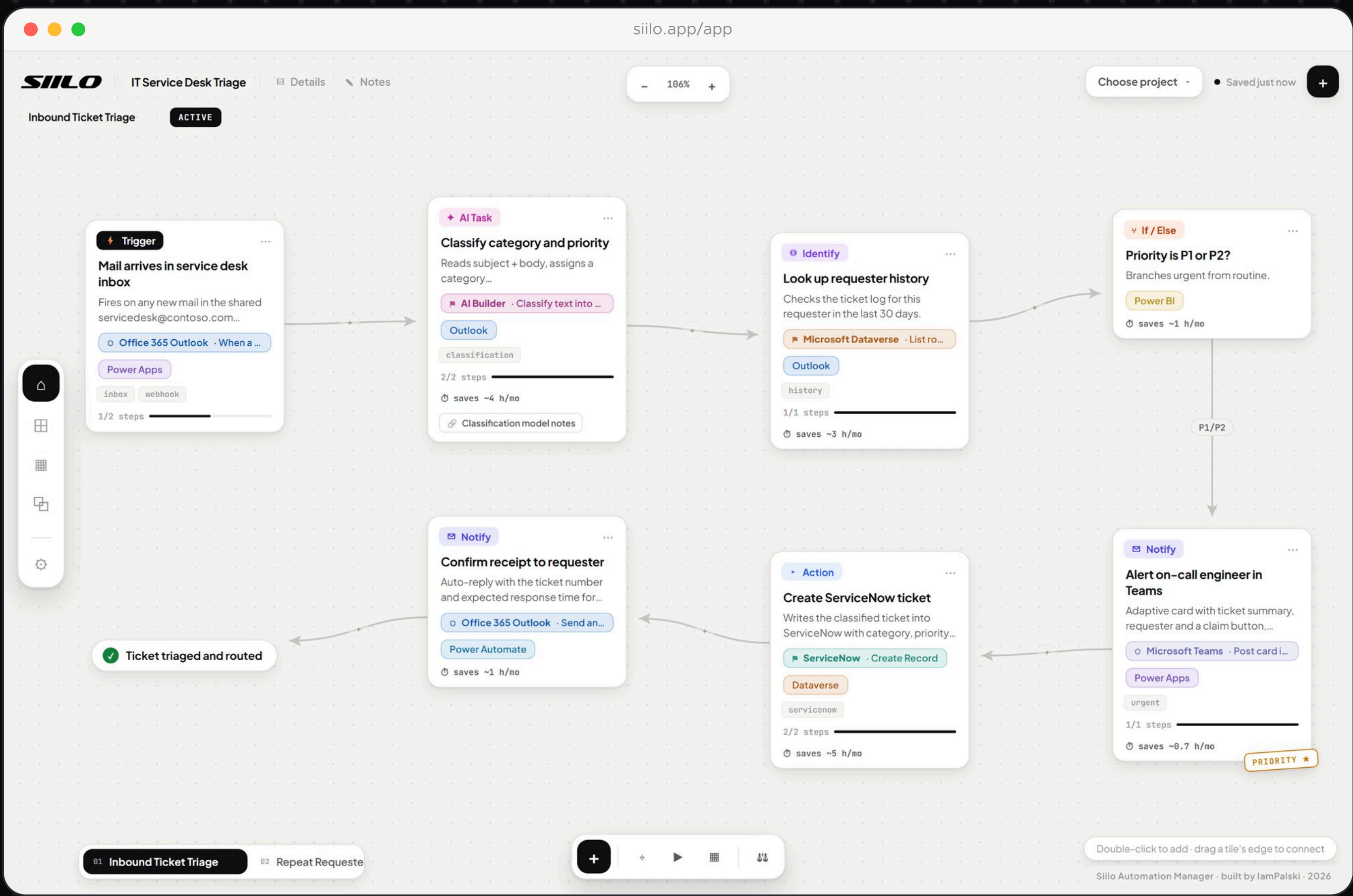
PRODUCT OVERVIEW · SEPTEMBER 2026

# Map the process. Hand over the build.

Siilo turns an automation request into a process map anyone can read, checks it against your Power Platform licensing and data policy, and writes the specification the builder needs.




WORKS ACROSS

AT A GLANCE

# Everything between the request and the build

Siilo is a workspace for the people who turn “can we automate this?” into something that runs in Microsoft 365. One project holds the request, the flow mapped step by step, the licence and governance check, and a build-ready handoff pack — so the thinking is written down once, where the builder can find it.

**132**
connectors mapped, each marked standard or premium as Microsoft lists them

**~1,700**
real Power Automate triggers and actions to name on a step

**11**
sections in every handoff pack, written from the map

**13**
step types, from trigger and approval to error handler

**4**
export formats for a pack: PDF, Word, Markdown and JSON

**10**
fully worked example projects, plus 11 flow templates

01 · WHY WE BUILT IT, AND WHO IT IS FOR

# Automation requests deserve better than an email thread

Every automation starts the same way: a message asking whether something can be automated. The detail arrives in pieces — an email, a Teams chat, a call where someone describes the process from memory — and it mostly stays there.

So the flow gets built from what the builder remembers. Halfway through, a **premium connector** turns up that nobody budgeted a licence for. On go-live day the **data policy blocks it**, because it mixes business and non-business connectors. Six months later it stops, because it **ran as the person who built it** and they have moved on. And when anyone asks what it does, the only documentation is the flow itself.

None of that is a technical problem. It is a scoping problem — the thinking happens, but it is never written down in one place.

We built Siilo to be that place. It sits **before** Power Automate: agree the request, map the process with the people who own it, settle the licensing, data policy and identity questions while they are still cheap to answer, and hand the builder a specification instead of a paragraph.

### Built for the in-house automator

The person in IT or operations with Power Automate access — and a queue of departments who want something automated.

- **IT and operations teams** taking automation requests from the rest of the business
- **Microsoft 365 and Power Platform admins** who own licensing and data loss prevention policy
- **Automation leads and Centre of Excellence teams** who review and prioritise what gets built
- **Consultants and partners** scoping work before building it for someone else
- **Anyone inheriting flows** that nobody documented

## What changes

| BEFORE | | WITH SIILO |
|---|---|---|
| The request lives in someone's inbox and chat history | → | **One project per request**<br>The brief, the map and the notes, together |
| Premium licences and DLP blocks found after the build | → | **Checked while mapping**<br>Licensing, data policy and run-as identity, flagged early |
| “Build something that does this” and a lot of questions | → | **An 11-section handoff pack**<br>Named triggers and actions, rules, tests and acceptance criteria |
| The flow is the only documentation of what it does | → | **Import it and read the map**<br>Existing flows drawn from a Power Automate export |

02 · WHO BENEFITS

# Better for everyone who touches an automation

A map everyone can read changes the conversation at every stage — from the person asking for the automation to the person supporting it a year later.

THE AUTOMATOR

### Scope once, build once

- A brief and a map agreed before anyone opens Power Automate
- Every step's connector and Power Automate action decided up front
- Inherited flows imported and documented in minutes

THE PEOPLE ASKING

### Their process, on one page

- A map they can read, question and correct before it is built
- Clear owners, dates and the time the automation will save
- Notes that record what was asked for, and by whom

IT MANAGERS AND AUTOMATION LEADS

### A pipeline you can prioritise

- Hours saved per month, rolled up for every project
- The same specification format across the whole team
- Templates for the flows the team builds again and again

THE BUILDER

### Start from a specification

- An eleven-section pack instead of a paragraph
- Named triggers and actions, conditions and exception routes
- Test scenarios and acceptance criteria written from the map

POWER PLATFORM ADMINS

### No surprises at go-live

- Premium connectors flagged the moment they are chosen
- DLP groups set to match your tenant's real policy
- The account or service principal each flow runs as, decided and named

SUPPORT AND SERVICE OWNERS

### Know what runs, and who owns it

- A named support owner and exception handling in every pack
- Error routes drawn on the map, not assumed
- Documentation regenerated whenever the map changes

03 · HOW IT WORKS

# From a paragraph to a build-ready pack

Four steps, in the order you would do them anyway — with the thinking written down once.

**1**

### Capture the request

Start a project and paste in the email, the Teams message or the notes from the call — kept exactly as it arrived.

**2**

### Map it on the canvas

Trigger, actions, branches and approvals, with the connector, Power Automate action and owner on every step.

**3**

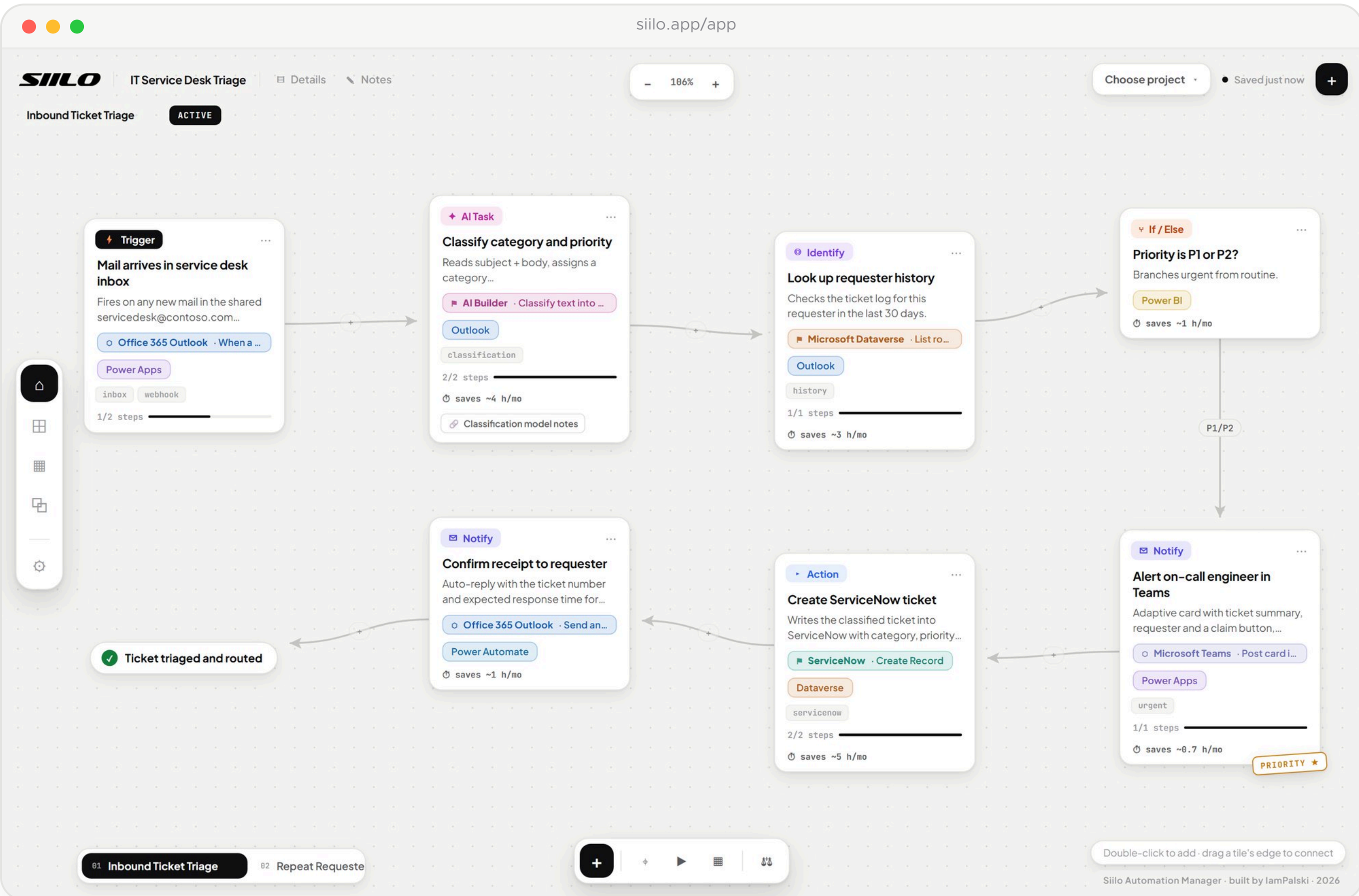
### Check it can be built

Premium connectors, DLP groups, run-as identity and steps with nothing chosen, flagged before anyone builds.

**4**

### Send the pack

An eleven-section specification, generated from the map and downloaded as PDF, Word, Markdown or JSON.




An IT service desk triage process: each tile carries its step type, connector and Power Automate action, the owner and the time it saves.

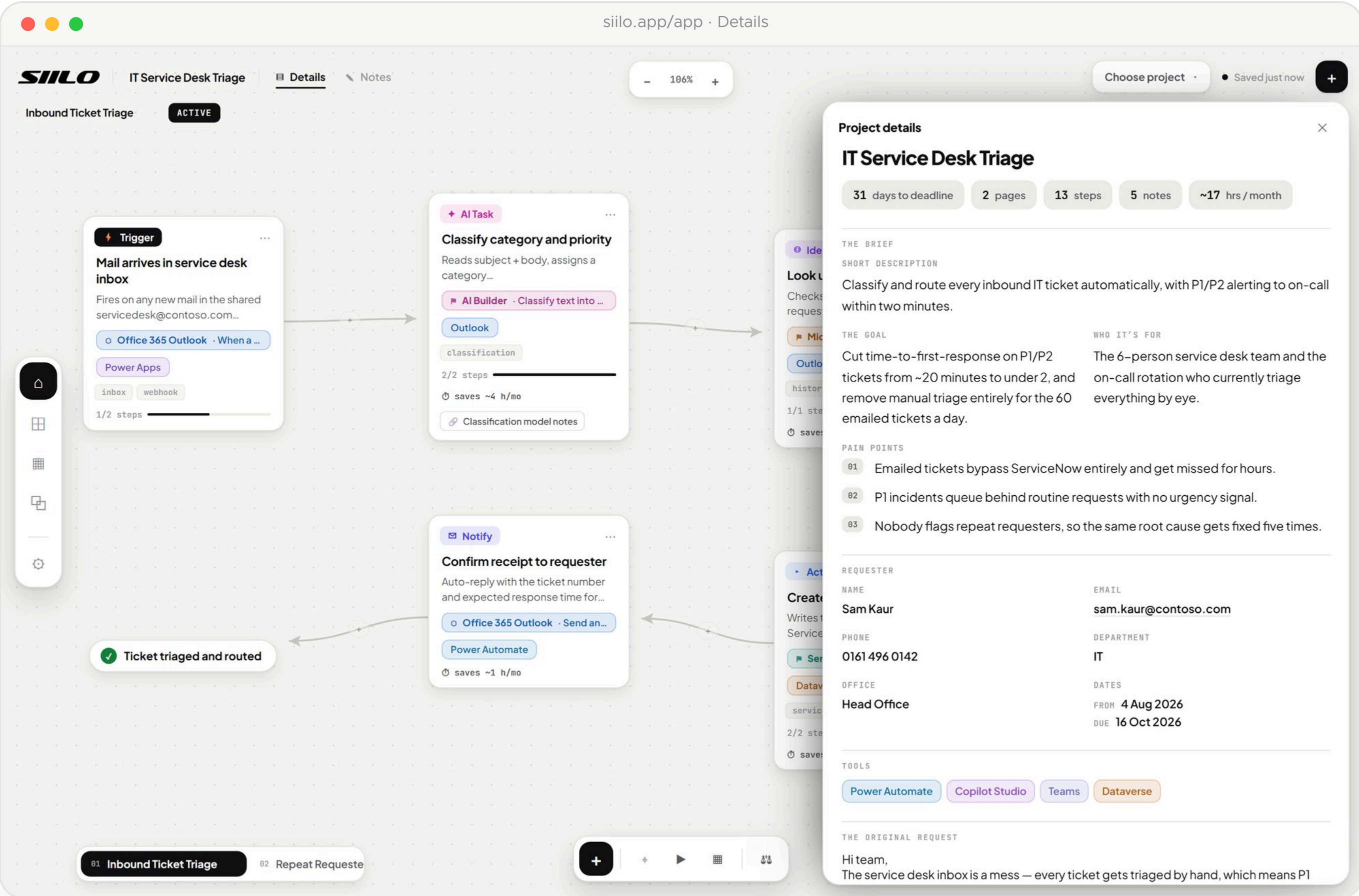
**Already built the flow?** Export it from Power Automate and import it. Siilo draws the map for you, so an existing automation can be documented, checked and handed over the same way.

**Works in any browser.** Nothing to install, and the canvas keeps a working copy on your machine, so it stays quick and carries on working if the connection drops.

04 · FEATURES · PROJECTS AND BRIEFS

# One project per request

Every automation request gets its own project. The Details panel holds the brief, beside the canvas rather than on a separate page, so the reason for the flow is never more than a click away.




### The brief

The original request, a short description, the goal it is measured against, the audience, pain points, the requester and their department and office, start date and deadline, and the tools involved.

### Generate a summary with AI

Turn a long, messy request into a clear summary in one click, using your own Claude or OpenAI key. The request goes straight from your browser to that provider.

### Projects page

Every project with a live miniature of its mapped flows, its pages and steps, and the hours it will save — plus a project picker to jump between them from anywhere.

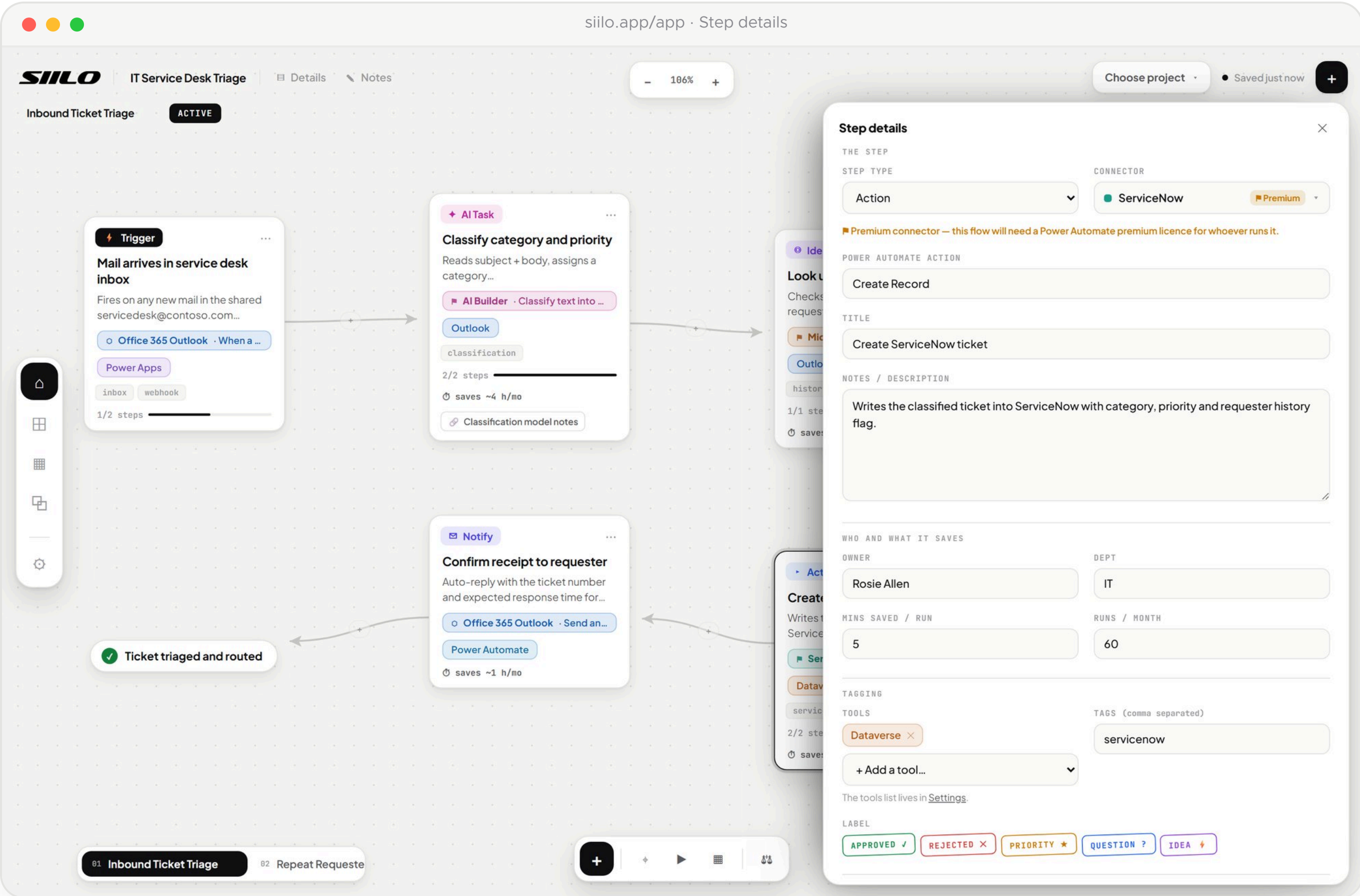
### Many flows, one project

A project can hold several flow pages — the main process, a reminder, a leaver path — each with its own status: draft, active or paused.

04 · FEATURES · THE CANVAS

# A canvas that keeps up, and every step fully specified

Double-click to add a step and drag from its edge to the next — the arrows route themselves as you move things. Click any step to specify it in the side panel.




### Thirteen step types

Trigger, Action, If / Else, Validate, AI Task, Identify, Approval, Apply to each, Wait, Notify, Error handler, End and Stop — plus sticky notes, stamps and labels for decisions still open.

### What each step records

Connector and Power Automate action, owner and department, tools, tags, a sub-step checklist and links to the documents and channels it relies on.

### Time saved, rolled up

Minutes saved per run and runs per month on each step become hours saved per month on the tile, the project and the handoff pack.

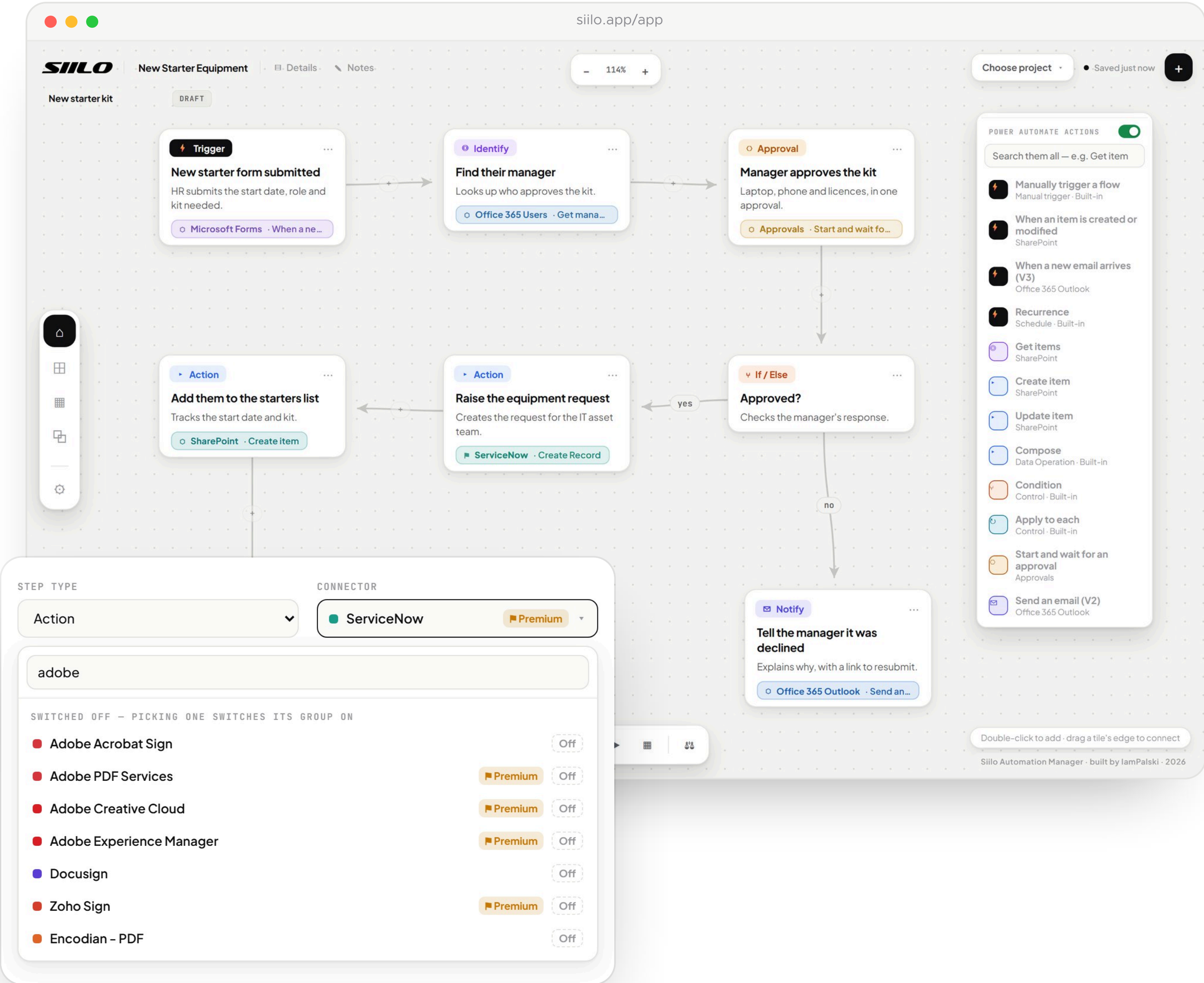
### Present it step by step

Walk stakeholders through the flow one step at a time, and label the wires — yes, no, P1/P2 — so every branch reads on its own.

04 · FEATURES · POWER AUTOMATE ACTIONS New

# Name the real Power Automate action

General step types are enough to agree a process. A builder needs more: which trigger, which action. Switch on Power Automate actions and every step says exactly that — **SharePoint · Get items**, **Approvals · Start and wait for an approval**.




### Off until you want it

A switch at the bottom of the add-a-step list. Turn it on and the popular triggers and actions appear in the same style as the step types — Manually trigger a flow, Get items, Compose, Condition, Send an email (V2) and more.

### Search the whole library

Nearly 1,700 triggers and actions across the catalogue, searchable by name. Picking one adds the step with its step type, connector and action already filled in.

### On every step, and in the pack

Tiles show the connector and action together, the step panel suggests the right actions for its connector, and the handoff pack writes both into each step's detail.

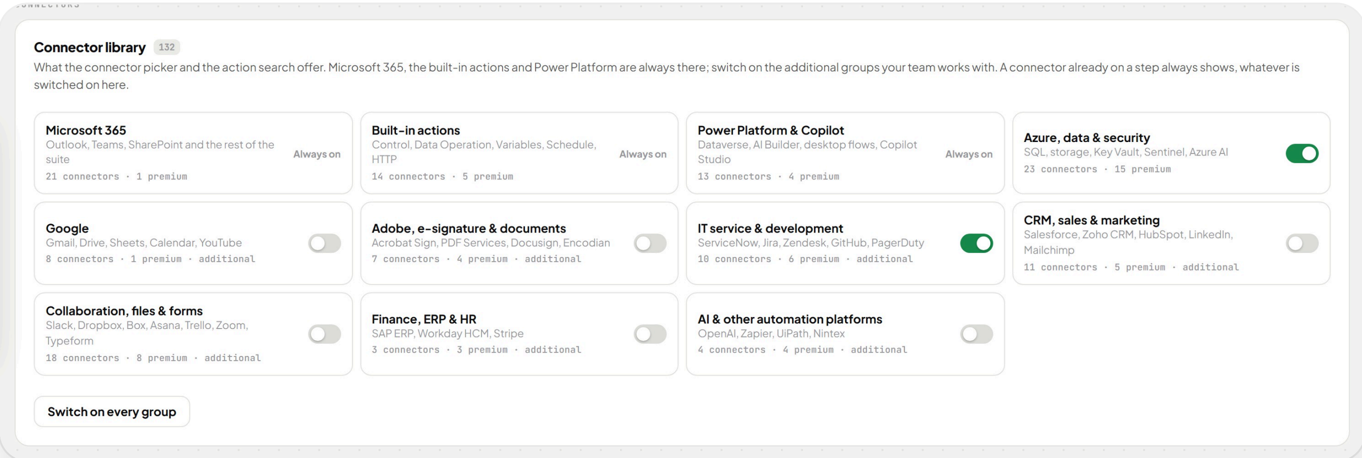
### Built-in actions kept apart

Control, Data Operation, Variables, Schedule and Date Time need no connector licence, so the licence and data policy checks leave them out.

04 · FEATURES · CONNECTOR LIBRARY New

# 132 connectors, in groups you switch on

Microsoft 365 and Power Platform, and the services teams run alongside them — Google, Adobe, Jira, ServiceNow, Salesforce, Zoho and more. Each one is marked standard or premium, so the licence check has a real answer the moment you choose it.



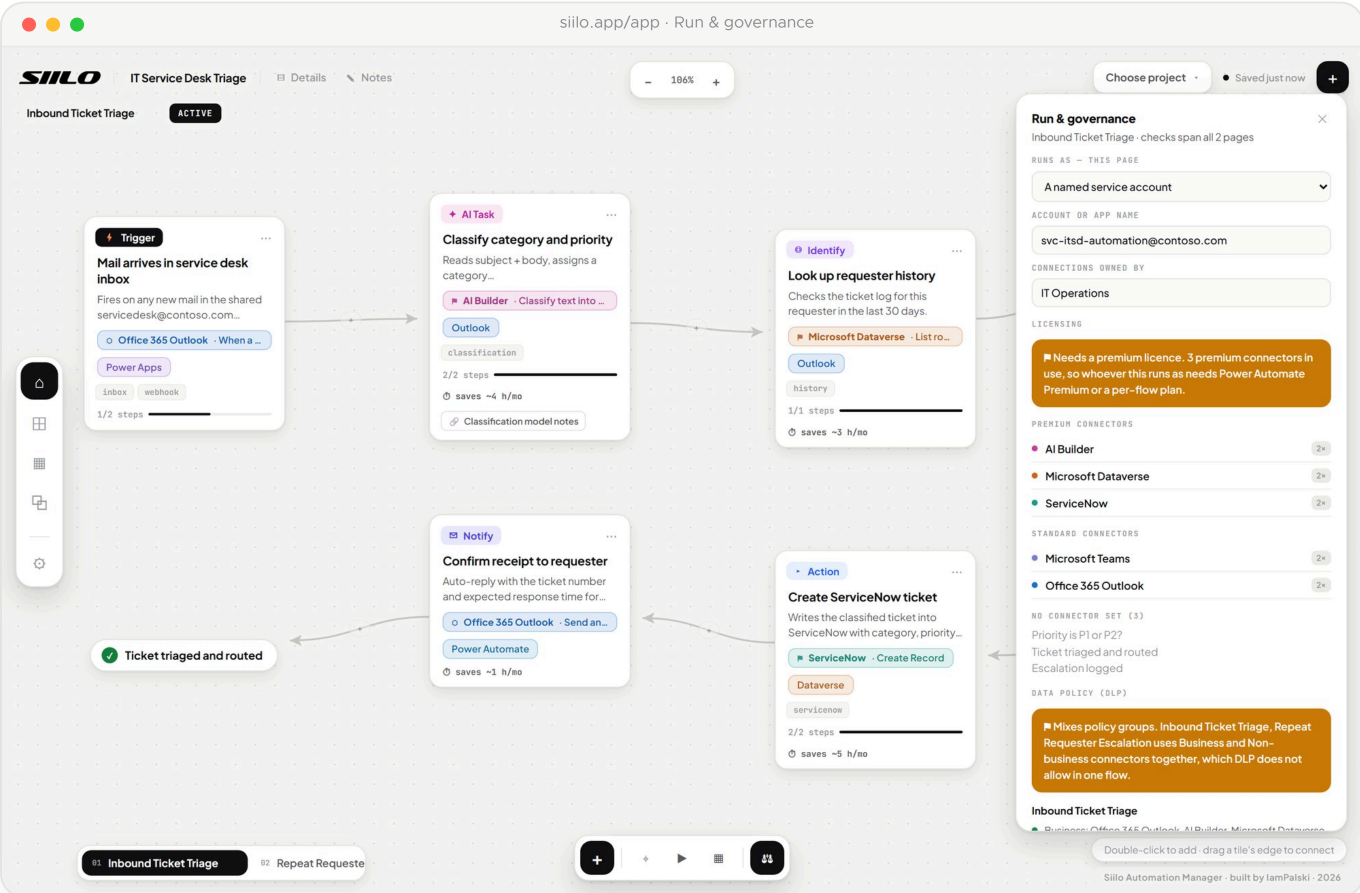

| GROUP | INCLUDES | CONNECTORS | PREMIUM | STARTS |
|---|---|---|---|---|
| **Microsoft 365** | SharePoint, Outlook, Teams, OneDrive, Excel, Forms, Planner, Approvals, Entra ID | 21 | 1 | Always on |
| **Built-in actions** | Control, Data Operation, Variables, Schedule, Date Time, HTTP, Request | 14 | 5 | Always on |
| **Power Platform & Copilot** | Dataverse, AI Builder, desktop flows, Copilot Studio, Power Apps, Business Central | 13 | 4 | Always on |
| **Azure, data & security** | SQL Server, Blob Storage, Key Vault, DevOps, Sentinel, Azure OpenAI, SFTP | 23 | 15 | On |
| **Google** | Gmail, Drive, Sheets, Calendar, Contacts, Tasks, YouTube | 8 | 1 | Off |
| **Adobe, e-signature & docs** | Adobe Acrobat Sign, PDF Services, Creative Cloud, Docusign, Zoho Sign | 7 | 4 | Off |
| **IT service & development** | ServiceNow, Jira, Confluence, Zendesk, Freshservice, PagerDuty, GitHub | 10 | 6 | Off |
| **CRM, sales & marketing** | Salesforce, Zoho CRM, HubSpot, Pipedrive, LinkedIn, Mailchimp, Twilio | 11 | 5 | Off |
| **Collaboration, files & forms** | Slack, Dropbox, Box, Asana, Trello, monday.com, Smartsheet, Zoom, Typeform | 18 | 8 | Off |
| **Finance, ERP & HR** | SAP ERP, Workday HCM, Stripe | 3 | 3 | Off |
| **AI & other platforms** | OpenAI, Zapier, UiPath, Nintex | 4 | 4 | Off |

> Groups that start off are still found by search, and picking one switches its group on. Tiers follow Microsoft's connector reference for Power Automate, which Microsoft updates from time to time. Zoho CRM and Zapier have no Power Automate connector of their own; Siilo says so, and treats them as reached through a custom connector or the premium HTTP action.

04 · FEATURES · RUN & GOVERNANCE

# Know it can be built, before anyone builds it

Three questions decide whether a flow survives in a real tenant: what it runs as, whether the licensing works, and whether the data policy allows it. The governance panel answers all three while you map.




## Runs as

For each flow page: the person who triggers it, a named service account, a service principal, or a named individual — with a warning that a flow owned by one person breaks when they leave.

## Data loss prevention

Set each connector to Business, Non-business or Blocked to match your tenant in Settings. A page that mixes Business with Non-business, or uses a Blocked connector, is flagged.

## Licensing

Every connector in use, grouped into premium and standard. One premium connector and the verdict says so: whoever it runs as needs Power Automate Premium or a per-flow plan.

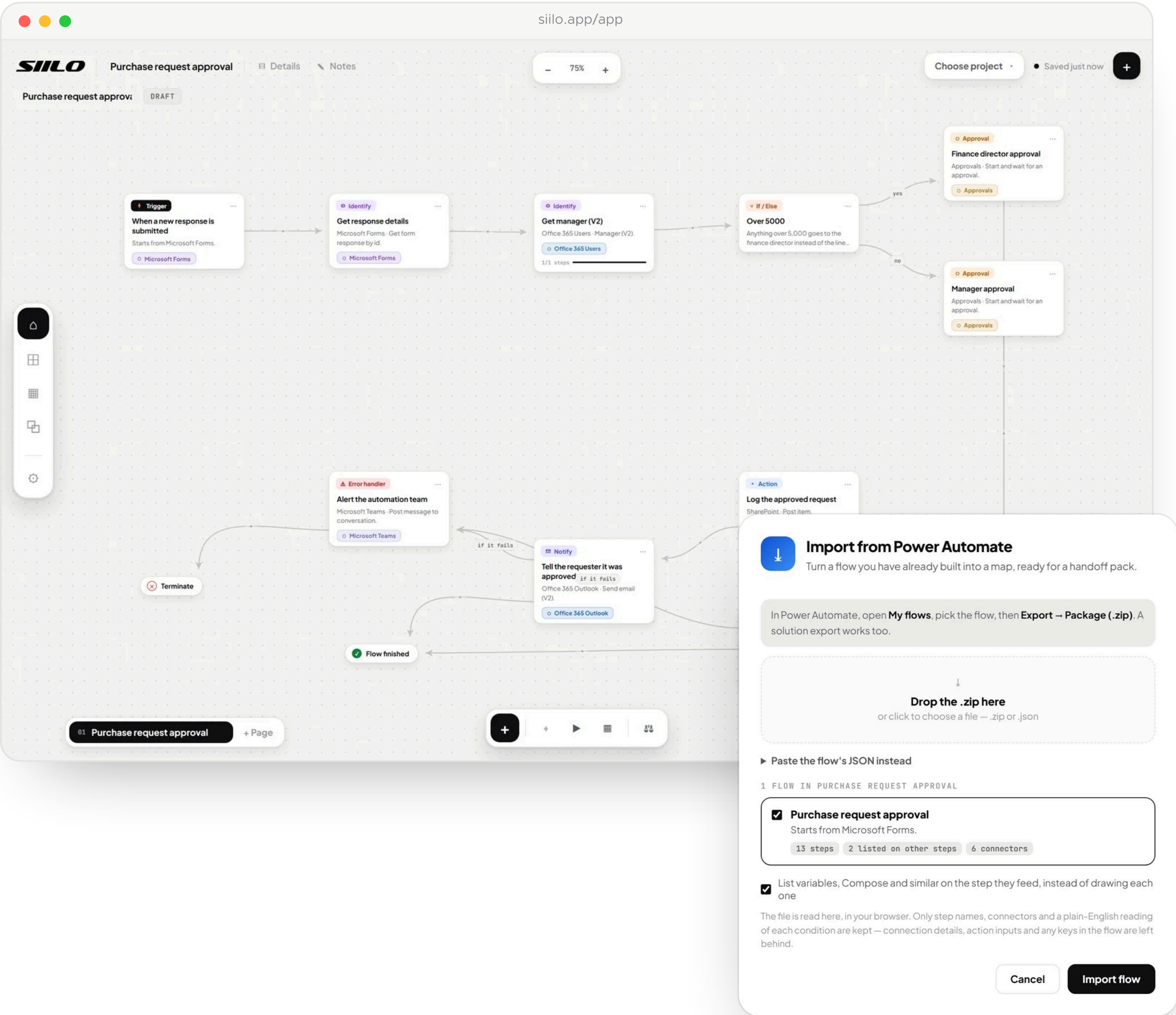
## Gaps, called out

Steps with no connector chosen are listed in the panel, and the handoff pack lists steps missing an owner or a description, so nothing goes out unfinished by accident.

04 · FEATURES · IMPORT FROM POWER AUTOMATE

# Already built it? Import the flow.

Export a flow from Power Automate and drop the file into Siilo. It draws the map for you — trigger, conditions, approvals, error handling and every connector — so an existing automation can be documented and handed over like a new one.




### What it reads

A package export (.zip), a solution export with one flow or many, or the flow's JSON pasted in.

### How it reads

Conditions in plain English, failure routes as error handlers, and each action named as the designer shows it. Variables and Compose steps are listed on the steps they feed.

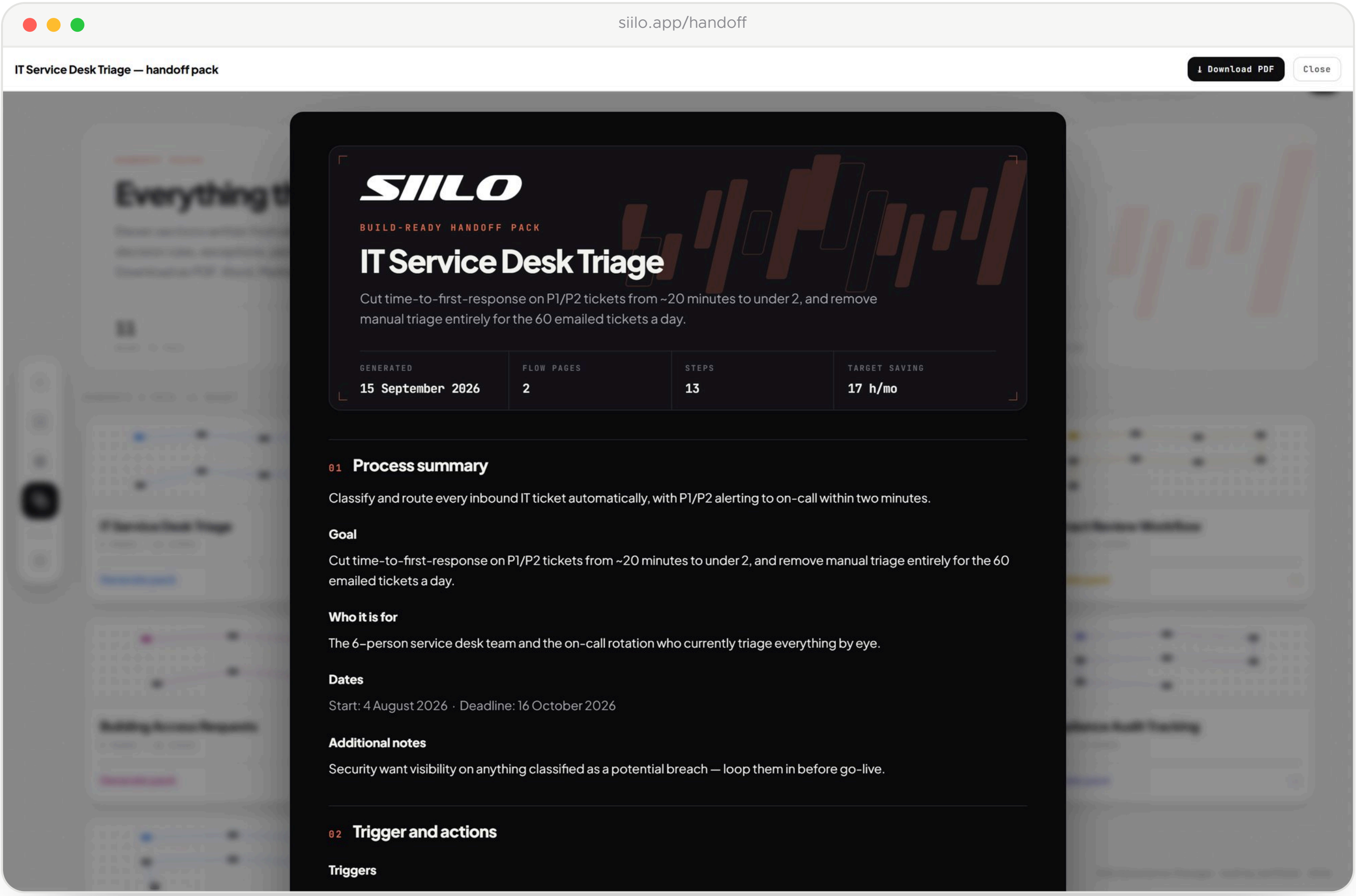
### What it leaves behind

The file is read in your browser. Connection details, action inputs and any keys in the flow are never kept.

04 · FEATURES · HANDOFF PACKS

# The handoff pack writes itself

One click turns the map into a branded build specification. Download it as PDF, Word, Markdown or JSON, keep every version in the library, and generate it again whenever the map changes — so it never drifts out of date.




**01 Process summary**
What it is for, the goal, who it serves and the dates

**02 Trigger and actions**
What starts it, then every action in run order

**03 Systems and connectors**
Everything the build connects to

**04 Input and output data**
Where each step's data comes from and goes, with its connector and action

**05 Conditions and business rules**
What must be true, and a when-then line for every branch

**06 AI prompts**
The intent of each AI step, as the prompt the builder needs

**07 Exception handling**
What happens when something fails, and who owns the fix

**08 Permissions, identity & licensing**
Run-as, connection owners, licence and DLP position

**09 Test scenarios**
Given-when-then tests drawn from the branches on the map

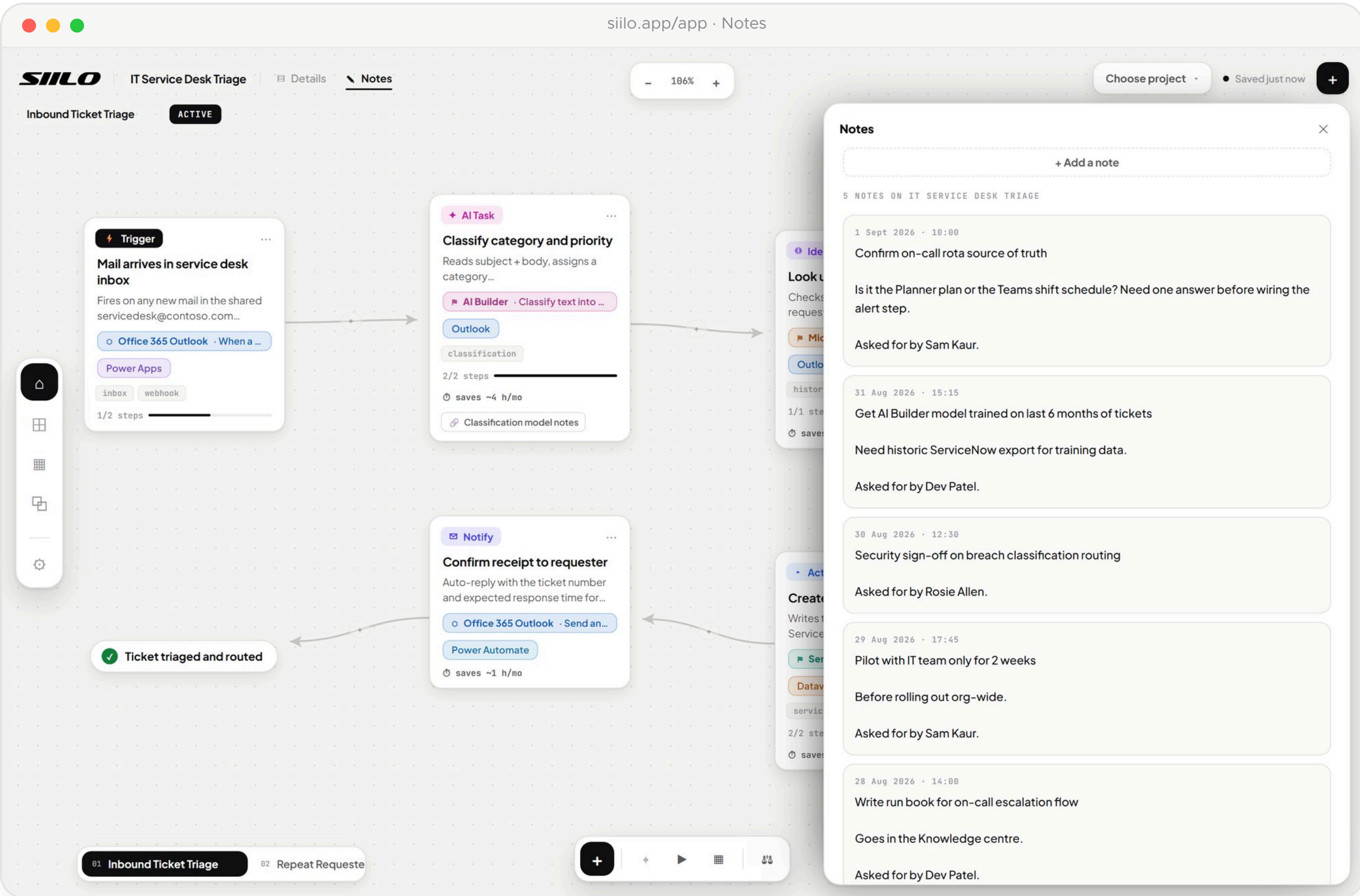
**10 Acceptance criteria**
What the finished automation must do before it is done

**11 Support owner**
The first line of support, and who to call in the business

04 · FEATURES · NOTES, RECORDINGS AND TEMPLATES

# Everything you learn along the way, kept beside the flow

Questions, decisions and who asked for what — kept with the project instead of scattered across inboxes. And flows you have already solved, one click from a new page.




## Notes

A running log for each project: the open question, the decision made, and who asked for it — dated, so the history of the flow reads in order.

## Recordings

Attach the Teams call where the process was explained, a walkthrough video or a voice note, up to 1 GB each. Recordings are kept in your browser on that machine.

## Templates

Eleven starting points — request form to SharePoint and Teams, document approval, starter and leaver, licence reclaim, shared mailbox triage, invoice approval and more — each dropping in with its connectors chosen.

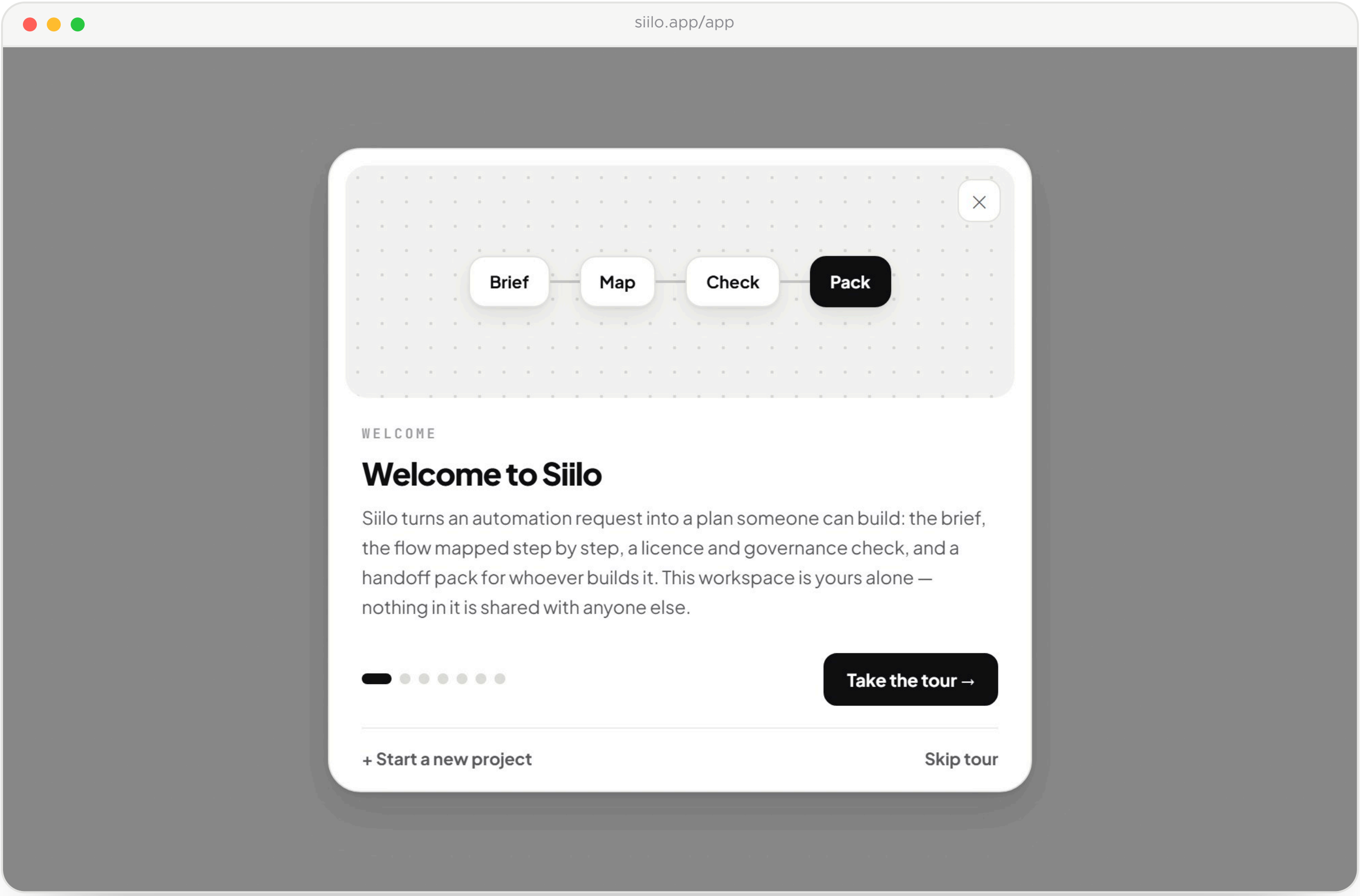
## Your own templates

Save any flow page as a template, so the patterns your team builds again and again start from a map rather than a blank canvas.

04 · FEATURES · ACCOUNTS AND YOUR DATA

# A private workspace, and a welcome for new starters

Every account is its own workspace. New starters are shown around on their first visit, and every account's projects are kept separate from everyone else's — even on a shared machine.




### Welcome tour New

A short, skippable tour of the main features on a new account's first visit, with a button to start the first project straight away.

### Every workspace kept separate New

A new account starts empty. Projects are stored against that account alone, and another person signing in on the same browser never sees them.

### Your data, portable

Your workspace syncs to your account, keeps a working copy for offline use, and can be exported as a JSON backup and imported again at any time.

### Your account

Sign up with an email address, set your display name, reset your password, choose light or dark, and sign out from the menu under your profile picture.

05 · WHAT YOU CAN DO WITH SIILO

# From one request to a whole automation pipeline

- **Scope a request in minutes** — paste it in, summarise it, and agree the map with the person asking
- **Cost the licensing early** — see the premium connectors while there is still time to choose another way
- **Document the flows you inherited** — import the export and generate the pack
- **Prioritise with numbers** — hours saved per month on every project, side by side
- **Decide the build before it starts** — connectors, actions, owners and run-as settled up front
- **Pass your data policy first time** — catch a Business and Non-business mix on the map, not in production
- **Hand over to anyone** — an internal maker, a new starter or an outside partner, from the same pack
- **Standardise how the team works** — templates, one specification format, one place for every request

## Ten worked examples, ready to explore

**IT Service Desk Triage** — IT
Classify and route every inbound ticket, with P1/P2 alerting to on-call within two minutes.

**Invoice Approval** — FINANCE
Read invoices as they arrive, match them to a PO, and route for approval by value.

**Vendor Onboarding** — PROCUREMENT
One intake form triggers compliance checks, document collection and the supplier record.

**Contract Review** — LEGAL
Triage, assign and track every contract from first draft to signed.

**Building Access Requests** — OPERATIONS
Access card requests with manager approval and a direct route to Security.

**Campaign Approval** — MARKETING
Every campaign asset through brand and, where needed, legal review before it goes live.

**Support Escalation** — CUSTOMER SERVICE
Detect escalation triggers and route to the right specialists, with SLA countdowns.

**Compliance Audit Tracking** — LEGAL
Audit findings become owned actions, with reminders and escalation when overdue.

**IT Asset Lifecycle** — IT
Every asset from purchase to disposal, reordering on low stock and clearing leaver kit.

**Expense Reimbursement** — FINANCE
Read receipts, check them against policy, and route only the exceptions to a person.

Each example is fully mapped — connectors, Power Automate actions, owners, time saved and notes — and can be added to any workspace from Settings, then removed again without touching your own projects.

# Map your next request properly

Siilo runs in the browser, so there is nothing to install. A workspace is ready in about ten seconds.

1. **Create your workspace**
   Sign up at siilo.app with an email address. Your workspace starts empty and is yours alone.
2. **Take the tour**
   A short look at the main features on your first visit — or skip it and start straight away.
3. **Start with a real request**
   Create a project and paste in the request, or load the ten worked examples from Settings to explore first.
4. **Switch on what your team uses**
   Turn on Power Automate actions in the add-a-step list, and the connector groups you work with in Settings.
5. **Map it, check it, hand it over**
   Draw the flow, clear the governance panel, and generate the handoff pack for whoever builds it.

WEBSITE

**siilo.app**

TALK TO US

**hello@siilo.app**