

Connecting your systems

From the SourceLace manual: Every system SourceLace connects to, who sets each one up, what people can read and change, and what to do when a connection fails.

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The latest version is at <https://sourcelace.onrender.com/docs>

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How connecting works

Connecting a system takes up to three steps, done by different people:

1. **Once per system, in that system** (some systems only): your admin for that system registers SourceLace there, for example an OAuth client in ServiceNow or a security integration in Snowflake. Some systems use an app SourceLace provides instead, which your admin may need to approve or install.
2. **Once, in SourceLace:** a SourceLace admin adds the **source** on **Manage sources**, with that system's options (see [Sources](#)).
3. **Each person, once:** they **connect** the source with their own login, from **Data Sources** in the SourceLace app or by asking their AI app to connect it. The system's sign-in page opens; they sign in there and come back. A connect link works once, for 10 minutes.

From then on, every request runs with that person's own sign-in, so the system's own permissions decide what they see and change. SourceLace keeps each person's sign-in encrypted with your organization's key and never shows it to anyone, including admins.

The redirect URL

Systems that use OAuth sign-in ask for the address they send people back to after they sign in. For SourceLace on this server it is:

`https://sourcelace.onrender.com/connect/callback`

Register exactly this address (with https, and no slash at the end) wherever a setup page asks for a redirect URL, callback URL or redirect URI for **connecting a source**. Single sign-on to SourceLace itself uses a different address, given on the [Single sign-on](#) page.

Every system SourceLace connects to

"In testing" means the connector is built against the vendor's documented API and covered by automated tests against a simulated system, but has not yet been used with a customer's live system. Tell support@sourcelace.com before you start with one, so we can help with the first connection.

System	Kind	Setup page	Reads	Changes	Status
Salesforce (Sales and Service Cloud)	salesforce	Salesforce	SOQL, schema, records	Create, update, delete	Available
Salesforce Data 360 (Data Cloud)	data360	Salesforce	SQL, schema, records	None	Available

System	Kind	Setup page	Reads	Changes	Status
Salesforce Marketing Cloud Engagement	sfmtc	Salesforce	Data extensions, journeys, content, send definitions	None	Set up with SourceLace support
SAP S/4HANA	s4hana	SAP	OData	None	SAP's public demo sandbox only
SAP SuccessFactors	successfactors	SAP	OData	None	SAP's public demo sandbox only
SAP ECC (on-premise)	ecc	SAP ECC	Gateway OData, through the SourceLace Agent	Create, update	In testing
HubSpot	hubspot	HubSpot	CRM search, schema, records	Create, update, delete	In testing
Gmail and Google Calendar	google_workspace	Mail and calendar	Mail, events, calendars	Email drafts only	In testing
Outlook mail and calendar (Microsoft 365)	microsoft365	Mail and calendar	Mail, events, calendars	Email drafts only	In testing
Google Drive	google_drive	Files	Search, folders, file text	None	In testing
SharePoint and OneDrive	microsoft_files	Files	Search, libraries, file text	None	In testing
Amazon S3	s3	Files	Keys, file text	None	In testing
Google Sheets	google_sheets	Google Sheets	One sheet's tabs, named by its link	Add rows, update cells	In testing
ServiceNow	servicenow	Service desks	Any table you can read	Create, update	In testing
Zendesk	zendesk	Service desks	Tickets, users, organizations, groups	Ticket create, update	In testing
Jira Cloud	jira	Service desks	Issues, projects	Issue create, update, comment	In testing
Snowflake	snowflake	Data platforms	SQL	None	In testing
Google BigQuery	bigquery	Data platforms	SQL	None	In testing
Databricks	databricks	Data platforms	SQL	None	In testing
Microsoft Dynamics 365 (Dataverse)	dynamics365	Business apps	OData, schema, records	Create, update	In testing
Oracle NetSuite	netsuite	Business apps	SuiteQL, schema, records	Create, update	In testing

System	Kind	Setup page	Reads	Changes	Status
Gong	gong	Business apps	Calls, transcripts, users, stats	None	In testing
PostgreSQL, MySQL, MariaDB, SQL Server, Oracle Database	database	Databases	SQL	None	In testing
MongoDB	mongodb	Databases	Find and read-only pipelines	None	In testing
Oracle Fusion Cloud (ERP, SCM, HCM)	oracle_fusion	Oracle Fusion and Workday	REST resources	Create, update	In testing
Workday	workday	Oracle Fusion and Workday	WQL, REST	Start a business title change	In testing
Your own system, through a connector you build	custom	Build your own connector	Your connector's own query language	Create, update, delete, if your connector allows it	New
Slack	slack	Slack and Teams	Conversations, messages, threads, search, people	Post a message or reply	In testing
Microsoft Teams	microsoft_teams	Slack and Teams	Channels, chats, messages, replies, search, people	Post a message or reply	In testing

Who sets up what

System	Your admin for that system	Your SourceLace admin	Each person
Salesforce, Data 360	Installs SourceLace's Salesforce app (a managed package) once, and decides who may use it	Adds the source with the org's login address	Signs in to Salesforce
Marketing Cloud	Creates a read-only installed package, with SourceLace support	Adds the source with the subdomain	Signs in to Marketing Cloud
HubSpot	May need to approve SourceLace's HubSpot app	Adds the source	Signs in and approves the app
Google (Gmail, Calendar, Drive, Sheets, BigQuery)	May need to allow SourceLace's Google app; for BigQuery, grants IAM roles	Adds the source	Signs in with Google
Microsoft (Outlook, SharePoint and OneDrive, Dynamics 365)	May need to grant admin consent to SourceLace's Microsoft app; for Dynamics, licenses and security roles	Adds the source	Signs in with Microsoft
ServiceNow, Zendesk	Registers an OAuth client in your instance	Adds the source with its Client ID	Signs in to ServiceNow or Zendesk
Jira Cloud	Nothing, unless your Atlassian organization restricts apps	Adds the source	Signs in and approves the site

System	Your admin for that system	Your SourceLace admin	Each person
Snowflake, Databricks	Creates an OAuth integration (Snowflake) or app connection (Databricks)	Adds the source with its client id	Signs in to Snowflake or Databricks
NetSuite	Turns on OAuth 2.0 and REST web services; may need to install SourceLace's integration; gives roles the permissions	Adds the source with the account id	Signs in and picks a role
Gong	Nothing to register	Adds the source	Signs in to Gong; Gong only lets technical admins approve the app
Databases	Your database administrator creates a read-only login per person and lets SourceLace's servers in	Adds the source with host and database	Signs in on SourceLace's form with their own database login
Amazon S3	Creates read-only AWS access, arranged with SourceLace support	Adds the source with buckets and region	Clicks Connect (no sign-in page)
Oracle Fusion, Workday	Registers an OAuth client in your identity domain or Workday tenant	Adds the source with the client's details	Signs in to Oracle or Workday
Your own connector	Your developers build and run the connector	Adds the source with its address and shared secret	Clicks Connect (no sign-in page)
SAP ECC (on-premise)	Your IT team runs the SourceLace Agent; your SAP Basis team trusts its CA (STRUST), maps certificates to users (CERTRULE) and activates the Gateway services	Creates the agent's token, then adds the source with the agent's id	Clicks Connect (no sign-in page)
Slack	May need to approve SourceLace's Slack app (Enterprise Grid: allow it per workspace)	Adds the source	Signs in to Slack
Microsoft Teams	Grants admin consent to SourceLace's Microsoft app (needed to read channel messages)	Adds the source	Signs in with Microsoft

How queries stay read-only

Every query is checked by SourceLace **before** anything is sent to your system: it must be in the language that source accepts, and anything that could change data is refused (for example INSERT, UPDATE, DELETE, MERGE, CREATE, DROP in SQL, more than one statement, or \$out and \$merge in MongoDB). Each setup page lists that source's checks. Where the system offers it, SourceLace also asks the system itself for read-only access: a read-only transaction in PostgreSQL and MySQL, read-only OAuth scopes, a byte cap in BigQuery.

A query returns at most 2,000 rows to SourceLace, of which 50 are shown to the AI at a time. Results are held in memory for 30 minutes so they can be joined, charted or made into a

document, and are never written to a database.

When something goes wrong

These messages can come from any source. Each setup page also lists the messages specific to that system.

What you see	What it means and what to do
"You have not connected <i>source</i> yet. Call <code>connect_source</code> to sign in with your own account."	Connect the source: ask your AI to connect it, or click Connect on Data Sources .
"Your sign-in to <i>source</i> has expired. Call <code>connect_source</code> to sign in again."	The system ended your sign-in (for example its refresh token expired or was revoked). Connect again.
" <i>source</i> did not accept your sign-in (...). Call <code>connect_source</code> to sign in again."	The system refused a fresh token too, often because your account or its permissions changed. Connect again; if it keeps happening, check your access in that system.
"This sign-in link has expired or was already used. Ask for a new one."	Connect links work once, for 10 minutes. Ask for a new link.
"Sign-in was not completed: ..."	The system's sign-in page reported a problem. The rest of the message is the system's own reason, such as a redirect URL that does not match or consent that was refused.
"There is no source called '...'. Call <code>list_sources</code> to see them."	The source id is mistyped, or the source was removed.
"Your groups in SourceLace do not give you access to ..."	Access by group is on and none of your groups gives you this. Ask a SourceLace admin.
"Writes to <i>object</i> are turned off for <i>source</i> . An admin can enable them per source and object."	A SourceLace admin must turn on Allow changes for that source and list the object.
" <i>source</i> does not accept changes through SourceLace."	That kind of source is read-only in SourceLace.
"The <i>kind</i> connector is switched off on this server. Ask whoever runs SourceLace to set ..."	SourceLace's app for that system is not set up on this server yet. Contact support@sourcelace.com .
"The <i>kind</i> connector is not available yet."	That kind of source is not built yet.
" <i>source</i> accepts ..., not ..."	The query was written in the wrong language for that source. The AI usually corrects this itself.
" <i>source</i> could not be reached." or "... did not answer in time. Try again shortly."	The system was down, slow, or blocked SourceLace's connection. Try again; for databases, check the firewall (see Databases).
"Result ... has expired or does not exist. Run the query again."	Results last 30 minutes. Run the query again.
"Change ... has expired, was already applied, or does not exist. Propose it again."	A change preview lasts 10 minutes and applies once. Ask for a new preview.
"SourceLace hit an unexpected problem ... Try again; if it keeps happening, tell your admin or SourceLace support."	Something SourceLace did not expect. It is logged for SourceLace's team (without your data); write to support if it repeats.