FAQ: Changes and approvals

From the SourceLace manual: When SourceLace may change a record in your systems, and how every change is previewed and confirmed.

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Changes and approvals

When SourceLace may change a record in your systems, and how every change is previewed and confirmed.

Can SourceLace change records?

Only where an admin has turned on changes for named objects of a source, and only one record at a time. You always see a preview of the current and new values first, and nothing is sent until you confirm. Some sources never accept changes, such as Gong, data platforms, databases and file stores. Workday accepts one kind of change, a business title change, which still goes through Workday's own approvals. Google Sheets accepts new rows and changed cells, never deleted rows.

Details: Turning on changes and Every system SourceLace connects to.

Is SourceLace read-only by default?

Yes. Changes are off for every source until an admin turns them on. Every query is checked before it is sent, and anything that could write, delete or run code is refused.

Details: How queries stay read-only.

How do I confirm a change?

In the SourceLace app, click **Apply** on the preview card. In other AI apps, SourceLace asks you directly when the app can show a confirmation box; otherwise the app gives you a link to a SourceLace page that shows the change and a short code, and you type that code into the chat. The AI app never sees the code, so it cannot confirm a change for you. A preview expires after 10 minutes, or sooner if your admin chose less.

Details: Changing records.

What if someone changed the record after my preview?

Where the system supports it, SourceLace refuses the change and asks for a fresh preview, so you never overwrite someone else's edit by accident. Your own permissions in the system still apply to every change.

Details: Reads, changes and query checks.

Can SourceLace send email?

No. Mail sources can only make drafts, which wait in your Drafts folder until you send them yourself. AI agents follow the same rule. (An event with guests is different: Google emails the invitation, but only after you confirm the preview.)

Details: Reads, changes and query checks.

Can SourceLace put a meeting on my calendar or invite people?

Yes, on Google Calendar, where an admin has turned on `events` for the source. SourceLace can make an event, move or edit one, or cancel one, only for events you organize. You see a preview first, including who Google will email, and nothing is made or sent until you click **Apply**. Agents do the same, and their events wait for approval. Outlook calendars are read-only.

Details: Making, changing and cancelling events.

Can SourceLace delete records?

Rarely. A few sources can delete a record, such as Salesforce, HubSpot and the email drafts SourceLace made, and only when changes are turned on for that object. A deletion is previewed and confirmed like any other change.

Details: Changing records.

Who approves changes that an AI agent proposes?

The agent's owner or an admin, on the **Approvals** page, unless your admins set an approval rule: then someone in the group the rule names, and, if the rule says so, not the person who asked. Each approval shows the record, every field's current and new value, and why the agent proposed it. **Approve and apply** checks the record and the rules again and applies the change with the owner's access at that moment. Approvals expire after 7 days unless your admin chose otherwise; the owner or an admin can extend one. Once everything a run proposed is decided, withdrawn or expired, the agent carries on with that run and says what happened.

Details: Approvals and Approval rules.

Who is told when an agent's change is waiting for approval?

The people who must approve it and the agent's owner get an email when it starts waiting, a reminder after a day, a warning a day before it expires, and a notice if it expired. Admins are not emailed unless your organization chose to. The email names the agent and how many changes wait, never what they hold, and you get at most one of each kind an hour. Switch them off for yourself under Your settings; you still see everything in Approvals. Your admin sets the timings on the Limits page.

Details: Who is told, and when and What happens when....

What happens if nobody approves an agent's change?

The people who must decide are reminded and then warned; the inbox marks the change overdue, then expiring soon. When the days run out the change expires, nothing is made, and the run ends saying "changes not made (expired with no decision)". The agent's next run proposes again what still applies. The owner or an admin can also extend a change, or withdraw a run's changes.

Details: What happens when....

Can I approve several changes at once?

Yes. On the **Approvals** page, tick the waiting changes (from one system or several) and press **Approve chosen** or **Reject chosen**. Each change is still checked, decided and recorded in the audit log on its own; if one cannot be approved, the others still go ahead and the page tells you which one and why.

Details: Approving several at once.

Can we require a second person, or only approve large changes?

Yes, with approval rules, set by your admins per system and object, for every agent or one agent. A rule can hold only changes above an amount (such as Amount above 10,000; smaller changes can then be made without approval where the agent's owner chose that), can require the approver to be in a named group (such as Finance), and can forbid the person who asked from approving their own change. A change that matches no rule is approved as before.

Details: Approval rules and fixed values.

Can we stop the AI from setting some fields?

Yes. Your admins can fix a field's value on every change to an object, such as Status = Draft or Owner = the person making the change. SourceLace sets it whatever the AI asked for, the preview marks it **fixed**, and this applies to changes from the chat, from AI apps and from agents.

Details: Fixed values.

Can an AI agent change records without approval?

Only if an admin allows it for named objects, or sets an approval rule that lets changes at or below an amount through (Enterprise plan), and the agent's owner also chooses it for that action. Even then the change uses the owner's access, only the listed fields can be set, and every change is in the audit trail. Admins can also require a period in which every change of a newly live agent waits for a person.

Details: Approvals and Days in shadow and approved changes.

Can a group have read access but not change access?

Yes. With access by group, each group gets **no access**, **read** or **read & write** per source, and per object if you like. **Read & write** alone does not allow changes: the source must also allow changes to that object, and each change is still confirmed.

Details: Access by group.

What can a vendor's MCP tools change?

Only what your admin allows. An admin marks some of the vendor's tools as read-only and may allow others that change data; every other tool is invisible. A tool that may change data never runs on its own: the person sees exactly which tool will be called with which arguments, and it runs once after they approve. Agents follow the same approval rules as for any other change. SourceLace cannot see inside the vendor's tool, so the preview shows the call, not the record's current values.

Details: How it works.