FAQ: Getting started

From the SourceLace manual: What SourceLace is, how people start using it in the SourceLace app, and which other AI apps can reach it too. If you run business systems, these answers show what you are asked to bring AI across; if you run operations or approve tools for security, they show what your p

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What is SourceLace?

SourceLace is the AI-native agentic platform for enterprise systems. One agent across all your systems, acting as each person, with every action approved and on the record. In the SourceLace app, your people ask exact questions across systems such as Salesforce, SAP, Workday, ServiceNow and Snowflake, make changes they approve first, and set up AI agents that do routine work on a schedule or when something happens, with what they propose waiting in an **Approvals** inbox. Each person works with their own login in each system, so they and their agents see only what they could already see. Reading is the default, and every question, change and agent run is recorded in your audit trail.

Details: Getting started.

How is SourceLace different?

SourceLace is one agent across all your systems, working with the agents you already have. It works across platforms and alongside the agents your platforms offer, which can hand tasks to SourceLace and take tasks from it over open standards such as A2A, MCP and webhooks. Each person works as themselves, with their own access in each system. Agents earn trust before they act alone: tests, a trial run, then approvals. Every action is approved and on the record, and SourceLace does not build a copy of your systems: results are held for a short time, and saved chats are kept encrypted for your organization's retention period. Your AI works without seeing your sensitive data, and the right people still see the real values.

Details: What SourceLace does.

Which AI apps work with SourceLace?

People work in the SourceLace app, which has its own assistant. As an optional extra, any AI app that can add a remote connector with sign-in, such as Claude, ChatGPT, Cursor or VS Code, can reach SourceLace too: add SourceLace's address, `https://mcp.sourcelace.ai/mcp`, as a connector in that app. From there people can ask, make changes after a preview they confirm, use skills, and start their agents. Your organization's own agent, on its own model, can connect the same way.

Details: Also from your own AI app.

Can we use SourceLace from Microsoft Teams?

Yes, as an optional extra. Someone in your organization builds an agent in Microsoft Copilot Studio, adds SourceLace to it as a Model Context Protocol tool with the address `https://mcp.sourcelace.ai/mcp`, and publishes it to Teams. A Teams admin approves it for the organization. The first time it uses SourceLace, each person signs in to SourceLace as themselves, so they see only what their own access allows. Agents are still built and approved in the SourceLace app, never in Teams.

Details: Use SourceLace from Microsoft Teams or Slack.

Can we use SourceLace from Slack?

Yes, as an optional extra. Slackbot, Slack's own assistant, can use SourceLace through a small Slack app your organization makes at api.slack.com: under **MCP Servers** it points at SourceLace's address, `https://mcp.sourcelace.ai/mcp`, with **Dynamic Client Registration** as its sign-in. Once a Slack admin approves the app and allows SourceLace's address in it, each person chooses **Connect** next to SourceLace under **Slackbot → Apps** and signs in to SourceLace once, so Slackbot acts as them, with their own access. Agents are still built and approved in the SourceLace app, never in Slack.

Details: Use SourceLace from Microsoft Teams or Slack.

How do we know what to set up next?

Getting started in the menu (under **Work**) lists the next steps in order, and a new chat's empty screen shows a line such as "Getting started · 7 of 18 · Continue" until your setup is done. Each step is one line with a **Go there** button that opens the right screen; click the step's name to see why it matters and a link to the instructions. Steps tick themselves off once SourceLace sees them done, such as a system connected or single sign-on working. Admins start with **Tell us about your setup**, a short form whose answers decide the steps you get. When a step is done in another product, such as your identity provider or Salesforce, an admin can **Send the instructions** to the person who looks after it.

Details: Your Getting started steps.

Do I need the SourceLace app if I already use an AI app?

Yes. The SourceLace app is where people work: it is where you build, run and manage AI agents, and the only place anyone approves what agents propose. Saved chats, projects, charts and files, and everything admins manage, are there too. Your own AI app is an optional extra: from it you can ask questions, make changes after a preview you confirm, use skills, and start your agents and check their runs.

Details: Where you use it.

How do I start?

Sign in to the SourceLace app, open **My connections**, connect a source with your own login, then start a chat and ask a question. For example: "Show my open opportunities over 50,000, newest first." If you are told you are not allowed in, your organization's SourceLace admin needs to invite you or add your email domain.

Details: Your first five minutes.

How long does it take to set up?

For most cloud systems, an admin adds the source in minutes and each person connects it once with their own login. Some systems need a one-time step by that system's own admin first, such as registering SourceLace there. On-premise systems take more planning with your IT department.

Details: How connecting works.

What are skills?

Skills are how-tos written by your organization, such as "build a QBR deck". The SourceLace assistant, your agents and any AI app you connected find a matching skill at the start of a task and follows its steps. A skill can never widen what anyone may read or change.

Details: Skills.

What is the difference between instructions and skills?

Instructions always apply; a skill is used only when a task matches it. Put house rules in instructions, such as "Amounts in EUR" or "Customer means an active account in Salesforce", and recipes for one kind of task in skills, such as how to build a QBR deck. Admins write instructions for the whole organization, admins and group managers for a group, and anyone for themselves on the **Skills** page, **Instructions** tab. When two disagree, the more specific one wins: organization, then group, then your own, then a project's.

Details: Instructions.

Can I see what changed in a skill, or go back to an earlier version?

Yes. Every save of a skill is kept as a version. Open the skill and look at **History**: it shows who saved each version and when, lets you view the text with what changed marked, and, if you can edit the skill, **Restore** an earlier version as the newest one. Nothing is erased, and the restore is recorded in your audit trail. A skill keeps its newest 200 versions.

Details: History and restore.

What are projects?

In the SourceLace app, a project groups your chats about one piece of work. Its instructions (such as "amounts in EUR") and its skills apply to every chat in it, and its board keeps the charts, tables and files you pin. You can share a project inside your organization; chats stay private to each person.

Details: Projects.

How do I pin a project, and who sees my pins?

Press the star on a project in the **Projects** list, or **Pin project** on the project's page. It then shows under **Pinned projects** in your sidebar, and **Show: Pinned** on the Projects page lists them. Pins are yours alone: nobody else sees them, and they change nothing about the project. You can pin projects shared with you; if the share is removed, the pin goes with it.

Details: Pinning a project.

How do I start a chat in a project?

Open the project and type your question in **Start a new chat in this project** at the top, then press **Enter**. The chat opens in the project with its instructions and skills. From inside a chat, **Add to a project** moves it into one.

Details: Starting a chat in a project.

How do I star a chat or move it to a project?

In the sidebar, press the star beside a chat to put it in **Starred**, or the folder beside it to choose **Move to project** (or **Remove from project**). On a computer you can also drag a chat onto a project in **Pinned projects** or **Recent projects** (on a touch screen, **Move to project** reaches every project). Chats in a project are on that project's page and leave the **Recent** list; tick **Show project chats in Recent** to see them in both. Search still finds every chat and shows its project.

Details: Starring chats, and chats in projects.

Where are my chats in the sidebar?

Below **New chat** and the quick links (**Search**, **Getting started** and **Projects**, then your **Pinned projects**) the sidebar has two panes: **Navigation** (with **Recent projects** at the top) and, under it, **Chats** with **Starred** and **Recent**. Both show from the start. The speech-bubble button beside the SourceLace name hides or shows **Chats**, and the three-line button does the same for Navigation; SourceLace remembers your choice in your browser. Navigation is grouped into **Work** (Skills, Agents, My connections), **Help** and, for admins, a folded **Administration** group.

Details: Starring chats, and chats in projects.

Can I ask SourceLace how to set something up?

Yes. Ask the assistant in the SourceLace app (or your own AI app), for example "How do I connect Snowflake?". They search this manual and answer with a link to the page. The manual is also at https://sourcelace.ai/docs, and every page downloads as a PDF.

Details: Asking about SourceLace itself.

Where do I get help?

Email support@sourcelace.com, or use the **Help centre** in the app, which starts an email with your organization filled in. Please never send passwords, keys or customer data. Security questions go to security@sourcelace.com.

Details: Getting help.

Where do I see what changed in SourceLace?

Once SourceLace publishes release notes, everyone signed in finds them under **What's new** in the app's menu, with a dot when there is something new since they last looked. The same notes are on the public release notes page on sourcelace.com, with a feed, and at the end of the manual's release notes page. Admins also get an email for anything that needs them to act, and a monthly summary they can turn off.

Details: Release notes and deprecation policy.

How much notice do we get before something is removed?

At least 6 months, and at least 12 months for anything an Enterprise contract depends on, such as features of the SourceLace Runner and connections to your systems. A **Deprecated** release note gives the removal date and what to use instead, and your admins are emailed when it is published and again 90 and 30 days before the date. The only exception is a security emergency, and the note then says so.

Details: Release notes and deprecation policy.

How do I change my name, picture or dark mode?

Click your name at the bottom of the sidebar and choose **Your settings**. **Profile** has your name and picture, and **Appearance** has the theme (light, dark or match your device) and the text size. The choices are saved to your account, so they are the same on every device.

Details: Your settings.

Does SourceLace use my Google picture?

Only if you ask it to. Signing in with Google does not copy your picture: SourceLace shows your initials until you add a picture. In **Your settings**, **Profile**, choose **Use my Google picture** to have SourceLace sign you in with Google once more and copy the picture your Google account shows during that sign-in (it replaces the picture you have now); it is reduced to a small square and kept encrypted with your organization's key, and SourceLace never links to Google's copy. You can replace it with your own or remove it at any time, and once you remove it nothing brings it back unless you choose it again. With Microsoft or single sign-on there is no Google picture to use: add your own.

Details: Your settings.

Where do I tell the assistant how to answer?

Click your name at the bottom of the sidebar and choose **Your instructions**. What you write there, such as "Answer in bullet points", is followed in all your chats, after your organization's and your groups' instructions. Under the chat box, **Options** shows a line saying whose instructions are being followed, with a link to yours.

Details: Instructions.

Can the assistant help me learn SourceLace itself?

Yes. Ask it for help with something in SourceLace, such as setting up an agent or finishing your setup. It asks what you want to achieve, gives a short plan and goes through it one step at a time, with an **Open** button for each screen. It uses your own Getting started progress and only suggests screens you may open. It does not change settings for you: you make each change yourself.

Details: Getting help to use SourceLace.