

Setup (Preview)

From the SourceLace manual: See how ready your setup is, review suggested setup changes, define your business terms, and save or bring in your whole SourceLace setup as one file. Nothing changes until an admin approves it. Setup is in Preview: new, offered for pilots and provided as is, and we are s

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

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Readiness score

The **Setup** page opens with your readiness score, from 0 to 100, and the checks behind it, grouped by area: sign-in, access, data protection, sources, AI model, agents, skills and business terms, and audit and retention. Each check says whether that part is ready, almost ready or not yet, and why. Checks give counts, such as how many people are in no group, and never name people.

- The checks that matter most, such as single sign-on, access by group and data protection, count three times as much as minor ones. A check that is almost ready counts half.
- Checks of things your plan does not include are shown as not on your plan and left out of the score.
- Most checks offer a fix: the page where you make the change, a setup assistant scan of one of your sources, suggested changes for the review queue, or an industry pack that fits your sources. A fix never changes a setting by itself: you approve each change in the review queue.
- You can snooze a check for 30 days. It moves to the end of the list and still counts in the score, so the score always shows your setup as it is.
- Your SourceLace contact can see your score and which checks are ready, but not the details of each check, and never names or email addresses. Each time they look, it is recorded in your audit log.

The readiness score is in Preview and on every plan.

Review queue

Some parts of SourceLace suggest setup changes instead of making them: a setup file you bring in, and later ready-made setups for your industry and suggestions from SourceLace itself. Each suggestion arrives as a group of changes on the **Setup** page, under **Review**, with the reason for each and what it would change.

- Approve or reject each change, or all changes of one kind at once. Only approved changes are made, and they are made the same way as on the other admin pages, so the same checks and limits apply.
- Some changes depend on others, such as access for a group that does not exist yet. They are made in the right order, and rejecting a change also rejects the changes that need it.
- A change that needs a password or key (such as a new source) asks you for it when you approve. SourceLace saves it in the setting itself, encrypted, and never shows it again.
- Groups that come from your identity provider, and the people in any group, are never changed by a suggestion.

- New agents start in shadow mode (or as drafts when shadow mode is off), owned by the admin who approved them, so you can try them before they change anything.

Suggestions you leave alone are deleted after 30 days. Every decision is recorded in your audit log.

Setup assistant (Preview)

After you connect a system, SourceLace's own AI can read its structure and suggest a setup for it: groups and what they may read, data protection rules for fields that look sensitive (such as national ids, bank details, birth dates and personal phone numbers), business terms such as ARR or open pipeline, and the agents that fit. Every suggestion goes to the review queue, with the reason for it, and you approve each one with one click. Nothing changes before that.

Open **Setup, Assistant**, choose a source you have connected and what you want suggestions for, and start. It takes a minute or two; the page tells you when the suggestions are ready to review.

- **Run it with an admin account that can see everything** in that system. The assistant reads the system as you, so it can only suggest rules for objects and fields your own account there can see.
- **Check sample values** (on by default) lets the assistant look at a few rows of each object to spot values such as Social Security numbers or IBANs in fields whose names do not say so. It keeps only counts, such as "18 of 20 values look like a Social Security number". The values themselves are never saved, logged, shown to anyone or sent to the AI. Health records (FHIR) are never sampled. Your admin can lower how many rows are checked, or turn it off, in **Limits**.
- The AI sees only names: objects, fields, their types, short lists of allowed values, and those counts. Each scan counts as one AI question.
- Fields whose names or values look sensitive are always suggested, whatever the AI says. Groups get read access unless you ask otherwise, and new agents start in shadow mode (or as drafts) so they change nothing until someone makes them live.
- Turning on access by group comes last, and says how many people are in no group yet and would lose access.

The setup assistant depends on your plan, and your organization can run a limited number of scans a day.

Business terms

Tell SourceLace what your words mean: what counts as ARR, what "open pipeline" is, which field holds a customer's region. Add a term with its other names and a definition, and optional hints for a particular source. Admins edit terms under **Setup, Terms**.

The AI uses your terms everywhere SourceLace answers: in the SourceLace app, in agents, and in your own AI app, where they appear as the skill "Business terms". People can read that skill but change the terms only on the Terms page.

Setup files

Under **Setup, Files**, an admin can download the organization's setup as one file: access groups and what they may read, data protection rules, business terms, skills, agent templates, agent settings, the AI model, single sign-on, data retention and the limits you set. Agents are included only when you ask. Use it to keep a record, to review a setup, or to copy it from a test organization to your real one.

A setup file never holds people, group members, passwords, keys, chats or any data from your systems. When you bring a file in, SourceLace shows what it holds and which of your sources fits each part, lets you choose, and then puts only what differs from your setup now in the review queue. Bringing in the same file twice suggests nothing the second time.

Industry packs

Under **Setup, Industry packs**, start from a ready-made setup for your team instead of a blank page:

- **RevOps on Salesforce:** Sales, RevOps and Leadership groups, contact and lead phone numbers and email addresses masked, birth dates hidden, revenue terms such as ARR, open pipeline and win rate, skills for forecast calls and win-loss reviews, and agents for pipeline reviews, data hygiene, stale deals and renewals.
- **Supply chain on SAP (S/4HANA or ECC):** Procurement, Planning and Finance groups, supplier bank details and tax numbers protected, terms such as open PO, OTIF and days of supply, and agents for late purchase orders, low stock, month-end close and overdue invoices.
- **HR on SuccessFactors or Workday:** HR and People managers groups, national ids hidden and pay, birth dates and home addresses visible only to HR, HR terms such as headcount and attrition, and agents for onboarding, a monthly headcount summary and work anniversaries. Agents must be tried in shadow mode first, for 30 days, and a person approves their changes for 30 days after they go live.
- **Healthcare on FHIR:** groups for care management and clinical operations, extra detection on top of the masking of patient identifiers (which stays on), hospital terms such as readmission and length of stay, and two read-only agents: a daily admissions digest and a care gap list, which must be tried in shadow mode for 30 days first. Use it with test data only until business associate agreements are in place; it does not make your setup HIPAA compliant.

Choose which of your sources each part is for, and the pack's contents arrive in the review queue. As with any suggestion, nothing changes until you approve it, anything you already have is left out, and agents start in shadow mode (or as drafts) so you can try them first. Each pack covers most of a typical setup; you still add people to the groups and adjust the agents to your needs.

Help from your SourceLace contact

Your SourceLace contact or partner can suggest setup changes for you, such as an industry pack or a setup they prepared in a test organization. Their suggestions wait in your review queue like any other, marked as from them. On the **Setup** page you can also let them approve the changes they suggested; every approval is then recorded in your audit log under their name, as allowed by you, and you can turn it off at any time. Passwords and keys never travel with a setup: whoever approves a change that needs one enters it again.

Learn from use

SourceLace can notice questions several people keep asking in the SourceLace app, such as "what is the open pipeline in EMEA", and suggest turning each into an organization skill, or into an agent when the question comes back every week. Learning from use is **off** until an admin turns it on under **Setup, Learn from use**, and an admin can turn it off at any time, which deletes its suggestions.

- **What admins see:** the words the questions have in common, how many people asked, how many questions, the days the pattern was first and last seen, and which source the answers came from. Never who asked, and never the questions themselves.
- **Example questions:** only if an admin also turns on **Show examples**. Then up to three questions are shown per suggestion, each from a different person, with email addresses, phone numbers, card numbers, IBANs, Social Security numbers and your own data protection patterns masked. Other details people typed, such as a customer's name, can still show, so turn examples on only if that suits your organization.
- **When something is suggested:** only when at least 3 different people asked 5 or more similar questions in the last 30 days (your SourceLace contact can change these numbers, and never further back than you keep chats). A word becomes part of a suggestion only if at least that many people used it. Patterns already covered by one of your skills or agent templates are not suggested.
- **Drafting:** when an admin asks for a draft, SourceLace asks your AI model once, with the pattern's words, the counts and your sources' names (and the masked examples only if they are shown). It counts as one AI question. The draft skill or agent template arrives in the review queue; nothing changes until an admin approves it.
- **Dismissing:** a dismissed suggestion is not suggested again. SourceLace keeps only a scrambled fingerprint of it, not its words.
- **How long it is kept:** suggestions are deleted when the chats they came from are deleted, under your chat retention.

Learning from use only reads saved chats in the SourceLace app, never questions asked from your own AI app, and stays inside your organization: nothing is shared with other organizations or sent to SourceLace. It is in Preview and depends on your plan.

Setup files depend on your plan; see [plans](#). Ask support@sourcelace.com if you would like to try Setup.