

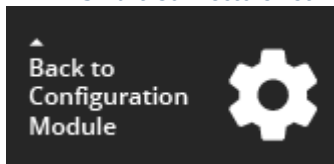
# Smart Connectors - Integration

## License Agreement

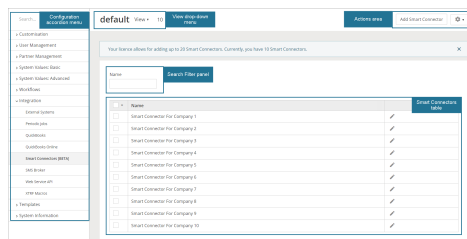
The article presents the features available in the Premium plan of XTRF Language Business Platform. Please keep in mind that your access to the described options might be limited due to your license agreement. If you would like to change your plan of XTRF Language Business Platform and gain access to the additional features, contact your [XTRF Customer Success Manager](#).

Target audience: Home Portal's users

- Configuration accordion menu
- View drop-down menu
- Actions area
- Search Filter panel
- Smart Connectors list



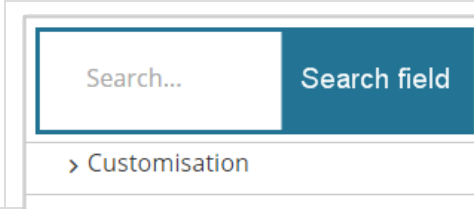
## Smart Connectors display



Smart Connector is a tool made for your client's convenience. Instead of creating multiple separate projects in the Customer Portal, the monitored folder or attach them to the message sent to an e-mail address defined in the associated Smart Connector. As the project is automatically created and e-mail notifications are sent to both the client and the Project Manager. When the project is finished defined in the Smart Connector's robot code.

## Configuration accordion menu

You can search and find the the Integration section to gain access to the Smart Connectors in XTRF Platform.



Search field	As soon as you start typing a search query an easy and convenient way of finding the
Smart Connectors section	In the Configuration accordion menu go to the list of all currently created Smart Conn

> User Management

> Partner Management

> System Values: Basic

> System Values: Advanced

### View drop-down menu

You can manage how and what information is displayed in the Smart Connectors list. Use the View drop-down menu to select and manage view. With this menu you can select the view you want to work with and also create new custom views.

Currently selected view title stands bold in the drop-down menu.

Smart Views are fully customizable, therefore the example view provided may be different than what you can see on your screen.

## All Entities View ▾ 4

### MY VIEWS

All Entities



default



Add New View

### QUICKBOOKS

QuickBooks Online

**Smart Connectors [BETA]**

SMS Broker

Web Service API

XTRF Macros

> Templates

> System Information



icon

Click the icon to view edit

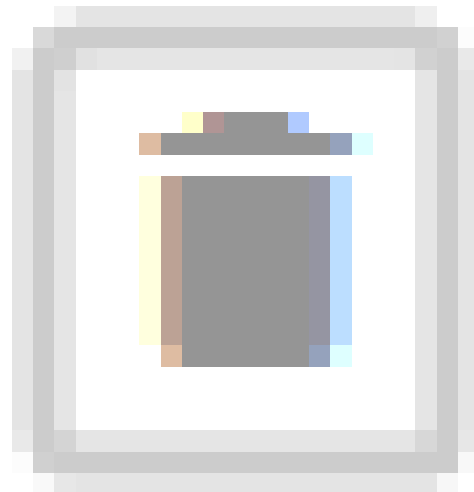
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Add New View

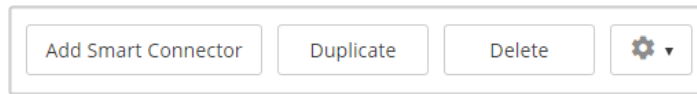
Click to c




Edit Smart View

Actions area

Use the buttons displayed to perform actions on the selected entities.



Action panel is an interactive field; it displays only buttons for actions which can be selected by a given user.

Add Smart Connector button	Click the button to create a new Smart Connector. The button directs you
Duplicate button	Click the button to copy an existing Smart Connector. You can duplicate c
<p>Duplicating Smart Connectors Keep in mind that multiple Smart Connectors with the same settin</p>	
Delete button	Click button to remove the selected entity from the system. You can dele
 icon	Error rendering macro 'excerpt-include' : User 'null' does not have permis Area'.

You can only perform the operations which you are given access to.

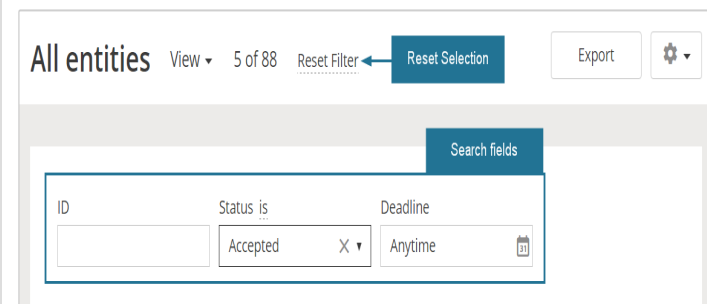
## Search Filter panel

You can narrow down your search results for a desired entity with the search filter.

The Search Filter panel contains individual fields. The search results are updated in real-time when you perform an operation on one of the fields.

You can configure the Search Filter fields for a given object.

Smart Views are fully customizable, therefore the example view provided may be different than what you can see on your screen.

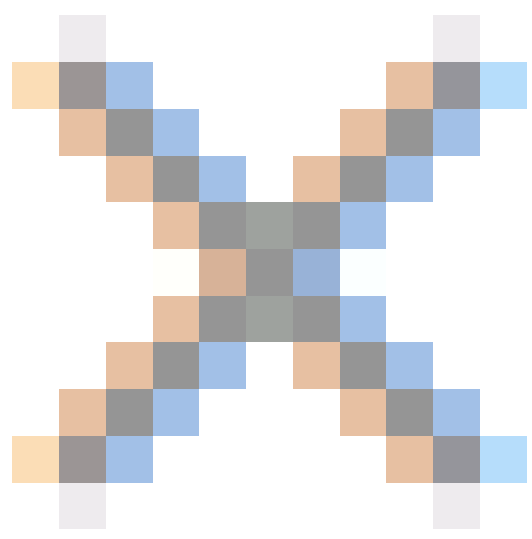


Reset Filter button	Click to restore the default settings
<p>Please keep in mind that the default value or setting. When the default settings of all fields are changed, the button becomes available.</p>	
Search fields	You can define your search settings. The actions: <ul style="list-style-type: none"> <li>Type in the text into the field.</li> <li>Click the drop-down menu and</li> <li>Click the field and select the time</li> </ul>
Search Field operator	Some of the fields have operators. The operator is marked as a link in the

Categories is not

 X ▾

Click the icon to restore the default



icon

### Smart Connectors list

You can view and manage Smart Connectors stored in the database. Click the name of the Smart Connector or anywhere in the appropriate row in order to see the details of the Smart Connector.

The example provided concerns the default view. Smart Views are very customizable, therefore the example might be slightly different than what you can see on your screen.

The default view columns enable you to:

- See the Name of already defined Smart Connectors.

Smart Connectors Limit  
The number of available Smart Connectors is limited. You can have as many active Smart Connectors as it is permitted in your license. To increase the number of available Smart Connectors contact your XTRF Sales representative.

<input type="checkbox"/>	Name	
<input type="checkbox"/>	Smart Connector For Company 1	↗
<input type="checkbox"/>	Smart Connector For Company 2	↗
<input type="checkbox"/>	Smart Connector For Company 3	↗
<input type="checkbox"/>	Smart Connector For Company 4	↗
<input type="checkbox"/>	Smart Connector For Company 5	↗
<input type="checkbox"/>	Smart Connector For Company 6	↗
<input type="checkbox"/>	Smart Connector For Company 7	↗
<input type="checkbox"/>	Smart Connector For Company 8	↗
<input type="checkbox"/>	Smart Connector For Company 9	↗
<input type="checkbox"/>	Smart Connector For Company 10	↗

### Checkbox column

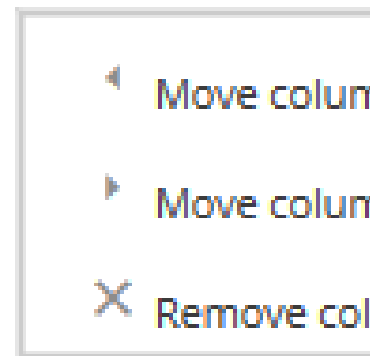
You can select the checkbox in the page. Click the arrow icon next to the selection actions menu you can

- Select All on This Page: Every entity on the page is selected.
- Select All Filtered: Every entity in the filtered list is selected.
- Unselect All: Any selected entity is unselected.



icon

Click the icon and select one of the

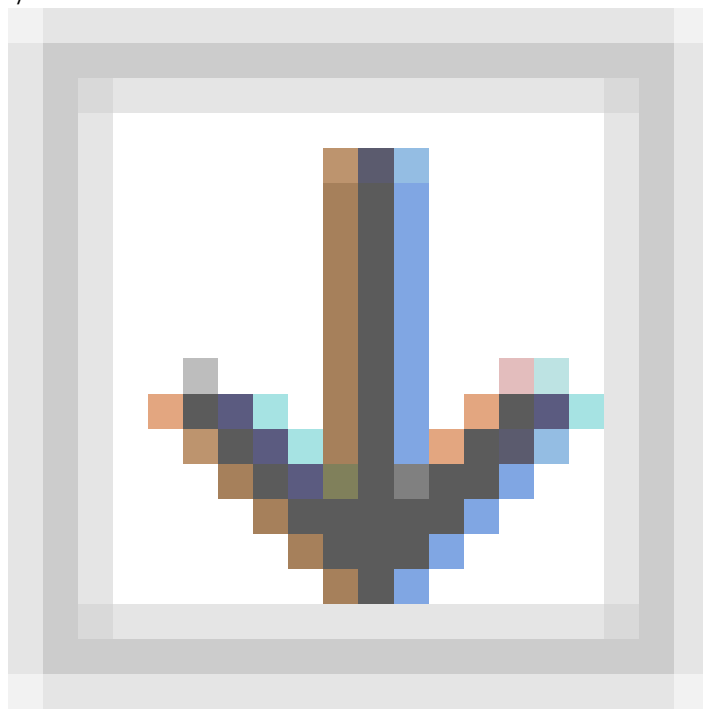




You can click one of the icons to set an ascending or descending sort

To change the sorting direction

/



icon

Context menu

Right-click on the table row to display the menu items according

The menu is interactive. The

Edit column

You can click the icons in appropriate

Please refer also to the related articles:

- Basic Definition:
  - [Smart Connectors Definition](#)
- XTRF Modules Context-Sensitive Help:
  - [Browse Smart Connectors - Integration](#)
  - [General Settings - Smart Connectors - Integration](#)
  - [Schedule - Smart Connectors - Integration](#)
  - [Notifications - Smart Connectors - Integration](#)
  - [Logs - Smart Connectors - Integration](#)
- User's Guides:
  - [Configuring Smart Connector](#)
- Technical Article:
  - [Smart Connectors - Technical Guide](#)

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