



TransferIQ Orchestrate

Quick start guide



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Introduction

The TransferIQ Orchestrate App seamlessly integrates with MFT/B2Bi solutions, providing a customized digital experience for onboarding trading partners and setting up file routes through a self-service platform with robust administrative oversight. A configurable workflow orchestrates the onboarding and file routing processes, enhancing collaboration and progress visibility for business users, administrators, and approvers. This system significantly reduces the time and resources needed to onboard and exchange files with new partners and manages and updates routing details for existing partners. Automation of administrator actions minimizes costly manual errors, boosting overall efficiency. The app implements role-based access control to govern user views and actions, ensuring security. Additionally, Orchestrate App integrates seamlessly with SAML-based SSO systems like Okta, facilitating easy user access, and ITSM systems like ServiceNow for creating and updating RITMs for official record-keeping.

Transfer IQ Orchestrate supports multiple file transfer protocols, including **SFTP** and **AS2**.

1. If only SFTP Protocol is deployed, the application will display the information associated with SFTP. This includes the SFTP server configuration details along with the PGP encryption keys and SSH keys used for secure access
2. If only AS2 Protocol is deployed, the application will display exclusively the information associated with AS2. This includes the AS2 server details as well as the certificates used for AS2 communication
3. When both AS2 and SFTP protocols are deployed, the application will display the information for both. This includes all AS2-related details such as server configuration and certificates used for AS2 communication as well as SFTP-specific details, including the SFTP server configuration and the encryption and SSH keys used for secure access.



Sign Up First Time Super Admin

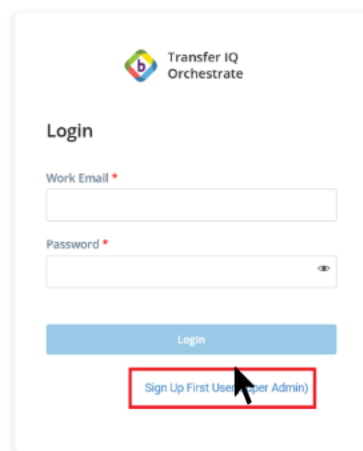
When the **Transfer IQ Orchestrate Application** is launched for the first time, the application does not contain any registered users. Since access to the application is restricted, it is necessary to add the **first user to start using the application**

To address this, the application automatically displays a screen prompting the registration of the initial user. This first user will be assigned **the Super Admin** role, allowing the user to configure settings, manage users, and perform other admin tasks.

This Super Admin account acts as the foundational user, enabling full access and control of the application

To sign up the first time Super Admin, follow the below steps

1. Click the **Sign Up First Super Admin** to begin the registration process for the first user, who will be assigned with role as **Super Admin**



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TIQ_ORCH.v1.8.2

2. Once the button is clicked a signup form will be displayed with the following fields
 - a. **First Name** – The first name of the Super Admin.
 - b. **Last Name** – The last name of the Super Admin.
 - c. **Email Address** – A valid email to be used for login and communication.
 - d. **License Key** – Only users with a valid license key can register and access the application. The Backflipt team will provide the license key offline to users



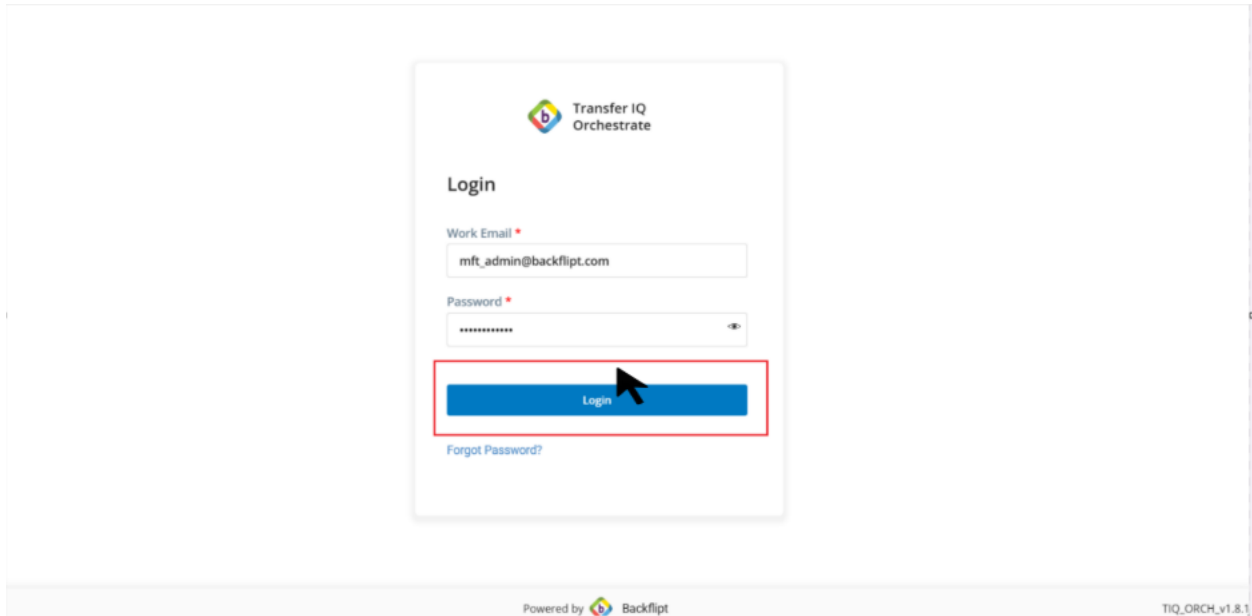
signing up for the first time. This key will then be used by the admin to log in to the application.

- e. **Password** – A secure password for account access.
 - f. **Confirm Password** – Re-enter the password to confirm accuracy.
 - g. **Phone Number** – A valid phone number for verification or support.
3. Click the **Continue** button to complete the registration process

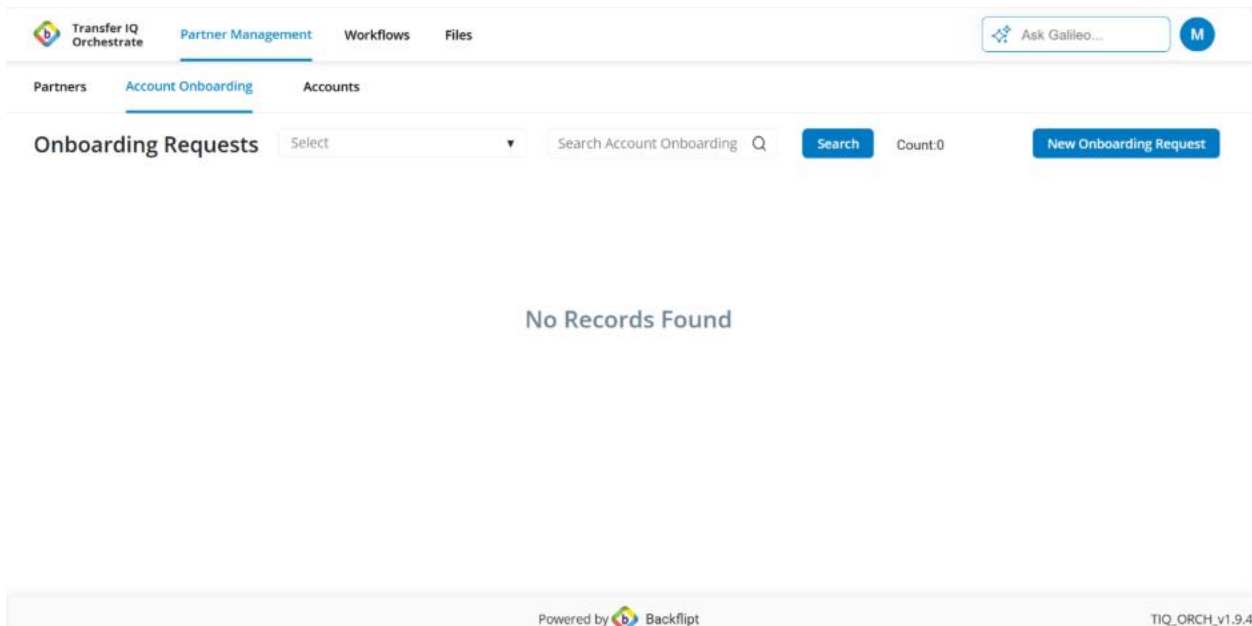
4. After the Super Admin is successfully registered, the application redirects to the following **Login page**.



5. Enter the email and password and click the login button to login to the application



6. Once login is successful, super admin is redirected to the application Partner Management >Account Onboarding



Configuration

When the user clicks on the **Configuration** tab, they are redirected by default to the **Servers** section.

The **Configuration** tab contains the following subsections:

- Servers
- MFT Settings
- Email & SSO Settings

Servers

When the user clicks on Configuration tab navigates to the Servers (**AWS Transfer Family Servers**) which displays the details of the servers deployed in a table format

SFTP Protocol

When only SFTP is deployed, The **AWS Transfer Family Server** section displays the SFTP server configured for the company with the following details

- Server ID:** A unique identifier for the SFTP server. This is clickable and navigates the user to the server details page.
- Server Name:** Name of the Server deployed, e.g. sftp_server
- Protocol:** SFTP
- Storage Domain:** Indicates the storage type used, e.g., **S3**.
- Endpoint Type:** Specifies the server's endpoint type, e.g., **VPC**.
- Identity Provider Type:** Displays the identity provider type, e.g., **SERVICE_MANAGED**.
- State:** Shows the current server status, e.g., **Online**.
- No of Accounts:** Displays the Number of accounts created for this server (blank ()) if no accounts are created yet).

Users can click on the **Server ID** to view more detailed information about that server.



Transfer IQ Orchestrator | Partner Management | Workflows | Files | Business Units | Users | Configuration

Servers | MFT Settings | Email & SSO Settings | External Services | Additional Settings

AWS Transfer Family Servers

Server ID	ServerName	Protocols	Storage Domain	Endpoint Type	Identity Provider Type	State	No of Accounts
s-2d6dedfb91584e618	tiqpl-qa_sftp_server	SFTP	S3	VPC	SERVICE_MANAGED	ONLINE	—
s-c79040c94b0c41569	tiqpl-qa_as2_server	AS2	S3	VPC	SERVICE_MANAGED	ONLINE	—

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The user can also click on the server, which navigates to the server page.

When a user clicks on a **Server ID** from the SFTP Servers list, they are navigated to the server details page. This page displays detailed information about the selected server, including:

- Server Name
- Protocol
- Storage Domain
- Endpoint Type
- Identity Provider Type
- Server ID
- State
- No of Accounts



Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Ask Galileo... M

Servers MFT Settings Email & SSO Settings Additional Settings

← s-8c2c299cf79e4f58a

ServerName	tiqqapcl-qa_sftp_server
Protocols	SFTP
Storage Domain	S3
Endpoint Type	VPC
Identity Provider Type	SERVICE_MANAGED
Server ID	s-8c2c299cf79e4f58a
State	ONLINE
No of Accounts	—

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AS2 Protocol

When only AS2 is deployed, The **AWS Transfer Family Server** section displays the AS2 server configured for the company with the following details

- Server ID:** A unique identifier for the AS2 server. This is clickable and navigates the user to the server details page.
- Server Name:** Name of the Server deployed, e.g. as2_server
- Protocol:** AS2
- Storage Domain:** Indicates the storage type used, e.g., **S3**.
- Endpoint Type:** Specifies the server's endpoint type, e.g., **VPC**.
- Identity Provider Type:** Displays the identity provider type, e.g., **SERVICE_MANAGED**.
- State:** Shows the current server status, e.g., **Online**.
- No of Accounts:** Displays the number of accounts as blank (—)



Server ID	ServerName	Protocols	Storage Domain	Endpoint Type	Identity Provider Type	State	No of Accounts
s-2d6dedfb91584e618	tiqpl-qa_sftp_server	SFTP	S3	VPC	SERVICE_MANAGED	ONLINE	—
s-c79040c94b0c41569	tiqpl-qa_as2_server	AS2	S3	VPC	SERVICE_MANAGED	ONLINE	—

When a user clicks on a **Server ID** from the Servers list, they are navigated to the server details page highlighting the **Server ID** in the header column. This page displays detailed information about the selected server, including

- Server Name
- Protocol
- Storage Domain
- Endpoint Type
- Identity Provider Type
- Server ID
- State
- No of Accounts



The screenshot shows the configuration page for a server in the Transfer IQ Orchestrator. The page is titled "Configuration" and is part of the "Servers" section. The server ID is "s-7690a49fa56a496ab". The details are as follows:

ServerName	pcl-tiq-qa_as2_server
Protocols	AS2
Storage Domain	S3
Endpoint Type	VPC
Identity Provider Type	SERVICE_MANAGED
Server ID	s-7690a49fa56a496ab
State	ONLINE
No of Accounts	—

At the bottom of the page, it says "Powered by Backflpt" and "TIQ_ORCH_v1.9.3".

SFTP & AS2 Protocol

When both **SFTP** and **AS2** are deployed, the AWS Transfer Family Servers section lists both servers in a single table. Selecting either server's ID opens its details page, which shows the same set of server information described above.



MFT Settings

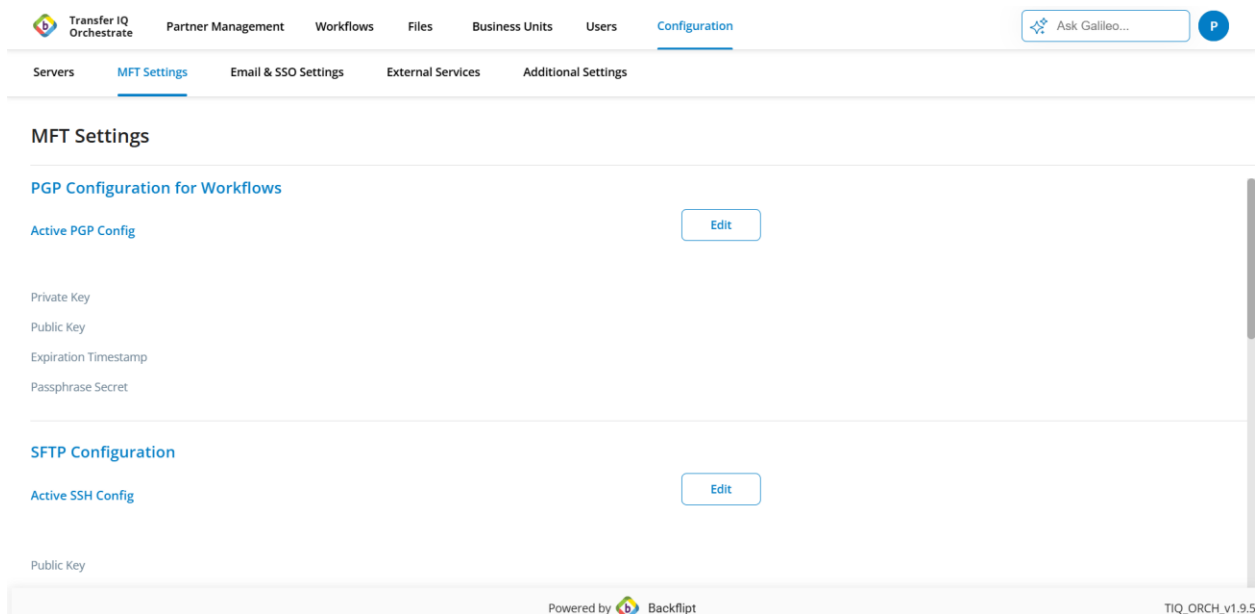
SFTP Protocol

When only the SFTP protocol is deployed, clicking on *MFT Settings* in the Configuration tab will navigate to the MFT Settings section, where only the PGP Config and SFTP Config are displayed. The SFTP Config contains the SSH keys required for logging into the SFTP server

By default, the page shows an empty state with the following fields:

It includes the following sections:

- a. PGP Configuration
- b. SFTP Configuration



The screenshot shows the 'MFT Settings' page in the Transfer IQ Orchestrator. The top navigation bar includes 'Transfer IQ Orchestrator', 'Partner Management', 'Workflows', 'Files', 'Business Units', 'Users', and 'Configuration'. Below this, there are sub-tabs: 'Servers', 'MFT Settings', 'Email & SSO Settings', 'External Services', and 'Additional Settings'. The main content area is titled 'MFT Settings' and contains two sections: 'PGP Configuration for Workflows' and 'SFTP Configuration'. Each section has an 'Active' status and an 'Edit' button. The PGP section lists fields for Private Key, Public Key, Expiration Timestamp, and Passphrase Secret. The SFTP section lists a Public Key field. The footer indicates the page is powered by Backflippt and shows the version TIQ_ORCH_v1.9.5.

Uploading PGP Keys:

1. Navigate to the PGP Config to upload PGP keys
2. At the top right, an **Edit** button is available in the PGP Config Section
3. When the user clicks **Edit**, they can upload valid PGP keys



Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Servers **MFT Settings** Email & SSO Settings External Services Additional Settings

MFT Settings

PGP Configuration for Workflows

Active PGP Config Cancel Save

Private Key * Upload

Public Key * Upload

Expiration Timestamp

Passphrase Secret Key *

SFTP Configuration

Active SSH Config

Powered by Backflpt TIQ_ORCH_v1.9.5

Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Servers **MFT Settings** Email & SSO Settings External Services Additional Settings

MFT Settings

PGP Configuration for Workflows

Active PGP Config Cancel Save

Private Key * Upload 0x1EA4D123-sec.asc Delete

Public Key * Upload 0x1EA4D123-pub.asc Delete

Expiration Timestamp Never

Passphrase Secret Key *

SFTP Configuration

Active SSH Config

Powered by Backflpt TIQ_ORCH_v1.9.5

Upon clicking Save, the provided details by the user will be saved.

PGP Configuration

PGP Encryption Public Key:

This is a **publicly shared key** used for file encryption.

1. When a partner needs to send files to the company, the company provides this public key in the *Account Creation Successful* email.



2. The partner uses this public key to encrypt files on their end, ensuring that the files can only be decrypted by the company.
3. Since it is a public key, it is safe to share with external partners.

PGP Encryption Private Key:

This is the **private key** that corresponds to the public key above.

1. The company keeps this key secure and never shares it.
2. When encrypted files are received from a partner, the company uses this private key to decrypt and access the file's contents.
3. The private key, together with the passphrase (if configured), ensures that only authorized company users can decrypt the data.

Passphrase Secret Key:

This acts as an **additional security layer** for the PGP private key.

1. The passphrase must be entered whenever the private key is used for decryption.
2. This prevents unauthorized use of the private key, even if someone gains access to the key file.
3. It ensures end-to-end data confidentiality by adding another authentication step.

SFTP Configuration

1. Navigate to the SFTP Config to upload SSH keys
2. At the top right, an **Edit** button is available in the SFTP Config Section
3. When the user clicks **Edit**, Super Admin can upload valid SSH keys

Below are the Fields Available in SFTP Config Section

SSH Login Public Key:

This is the **public part of the SSH key pair** used for server authentication.

1. The company shares this public key with the partner in the *Account Creation Successful* email.
2. The partner adds this public key to their server's authorized keys list.
3. Once configured, it allows the company to log in securely to the partner server without using a password.



SSH Login Private Key:

This is the **private part of the SSH key pair**, which must be kept secure by the company.

1. The company uses this private key to authenticate itself when logging in to the partner's server.
2. Together with the public key stored on the partner server, it enables a secure, password-less SSH connection.
3. The private key should never be shared or exposed, as it grants direct access to the partner server.

Key Rotation for SFTP

Key rotation in MFT for SFTP is the process of periodically replacing old SSH and PGP keys with new ones to maintain secure authentication, encryption, and uninterrupted file transfers.

Company Keys Rotation

When a company decides to migrate or rotate keys in an MFT system, the company replaces their old SSH and/or PGP keys with new ones. The process begins by generating a new key pair. For SSH, this ensures secure server login, and for PGP, it ensures continued file encryption and decryption.

After generating the new keys, the company shares the **new public keys** with all required partners—SSH public keys are added to the partner's SFTP server for authentication, and PGP public keys are shared so partners can encrypt files using the new key. Then, the company updates the application with the **new private keys** so the system can authenticate (SSH) and decrypt incoming files (PGP).

Company PGP Key Rotation

The process involves three distinct phases: **Before Rotation**, **During Rotation**, and **Deprecation**

Before rotation, only the **Active PGP Keys** section is visible, displaying the currently in-use keys.



1. Before Rotation

At this stage, the system continues to rely solely on the active keys for all ongoing file transfers and workflow executions.

The screenshot displays the 'MFT Settings' page in the Transfer IQ Orchestrator. The navigation bar includes 'Transfer IQ Orchestrator', 'Partner Management', 'Workflows', 'Files', 'Business Units', 'Users', and 'Configuration'. The 'Configuration' section is active, showing 'MFT Settings' with sub-sections for 'Servers', 'MFT Settings', 'Email & SSO Settings', 'External Services', and 'Additional Settings'. The 'PGP Configuration for Workflows' section is expanded, showing an 'Active PGP Config' entry highlighted with a red box. An 'Edit' button is next to it. The configuration details are as follows:

Field	Value
Private Key	0x1EA4D123-sec.asc
Public Key	0x1EA4D123-pub.asc
Expiration Timestamp	Never
Passphrase Secret	*****

A 'Rotate' button is located below the configuration details. The footer of the page indicates 'Powered by Backflit' and 'TIQ ORCH v1.9.5'.

2. During Rotation

To begin the rotation process

1. Navigate to **MFT Settings > Active PGP Keys**.
2. Click the **Rotate** button located next to the *Active PGP Keys* section



Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Servers **MFT Settings** Email & SSO Settings External Services Additional Settings

MFT Settings

PGP Configuration for Workflows

Active PGP Config Edit

Private Key	0x1EA4D123-sec.asc
Public Key	0x1EA4D123-pub.asc
Expiration Timestamp	Never
Passphrase Secret	*****

Rotate

SFTP Configuration

Powered by Backflirt TIQ_ORCH v1.9.5

3. This action displays an additional section labeled **New PGP Keys**, which includes fields for uploading both **public** and **private** PGP keys along with the corresponding **passphrase**.
4. To upload the new keys, click the **Upload** button under the **New PGP Keys** section.

Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Servers **MFT Settings** Email & SSO Settings External Services Additional Settings

MFT Settings

New PGP Config

Private Key *	Upload
Public Key *	Upload
Expiration Timestamp	
Passphrase Secret Key *	<input type="password"/>

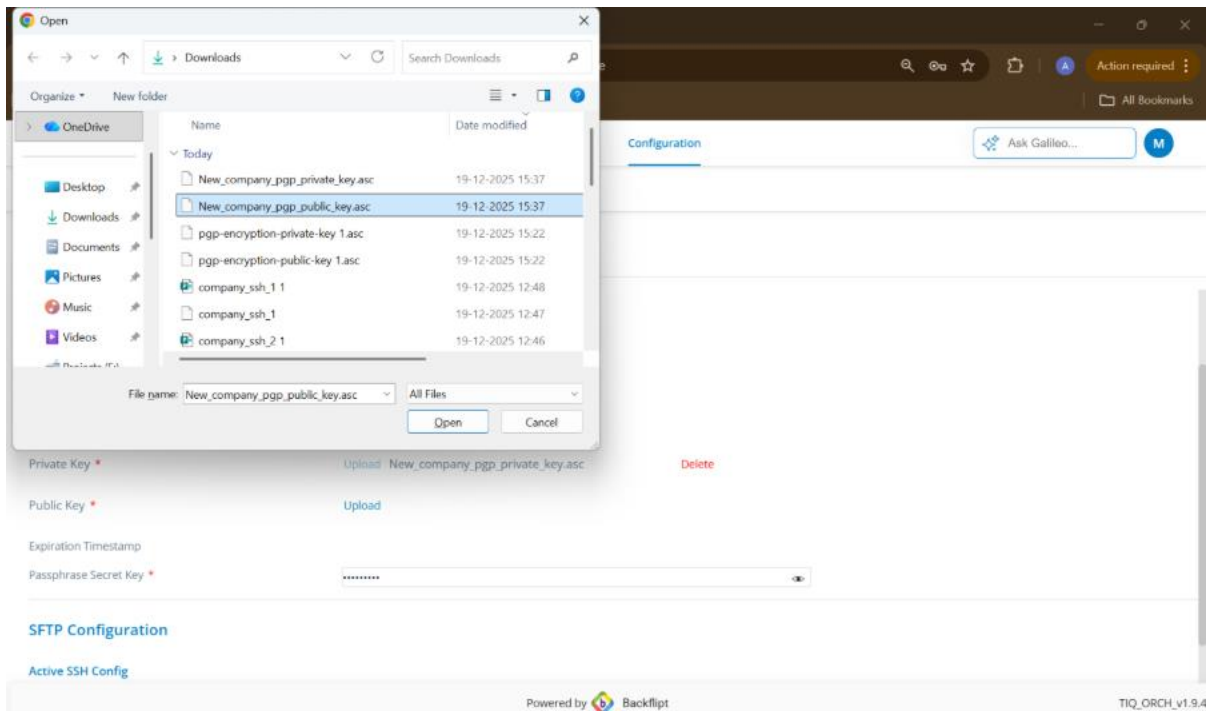
SFTP Configuration

Active SSH Config

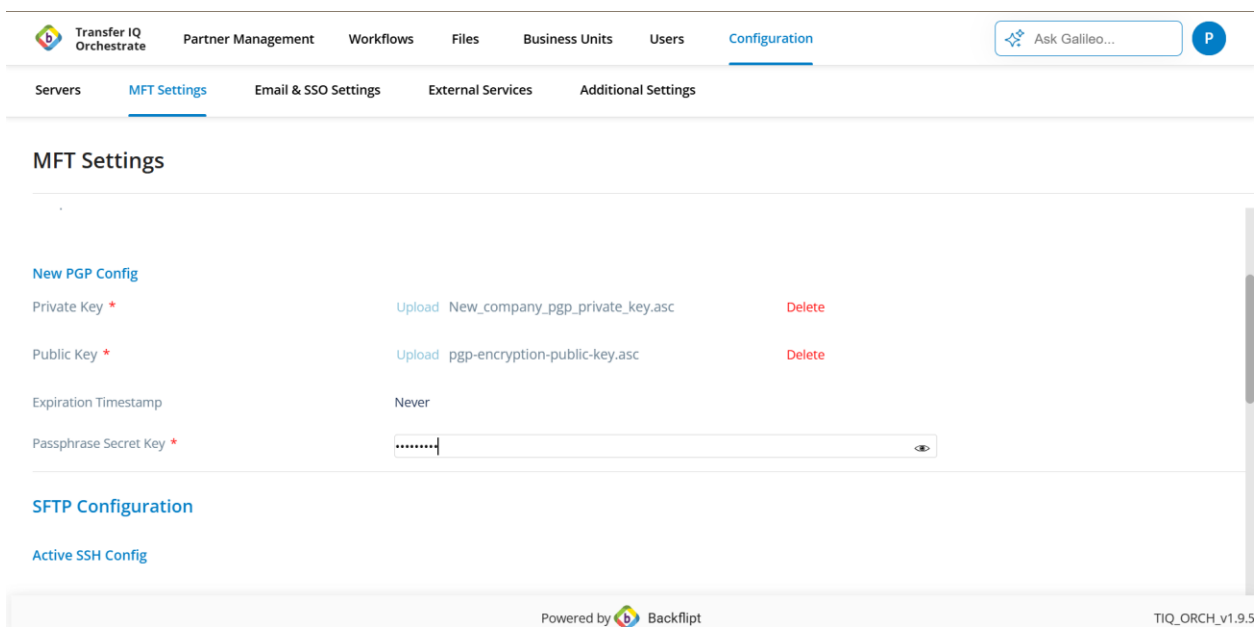
Powered by Backflirt TIQ_ORCH v1.9.5

5. In the file selection dialog, choose a valid PGP key file.





- Once the file is uploaded successfully, the newly uploaded keys are displayed in the **MFT Settings** tab under the **New PGP Keys** section with an expiration timestamp.



- Enter a valid passphrase in the Passphrase Secret Key Field



Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration P

Servers **MFT Settings** Email & SSO Settings External Services Additional Settings

MFT Settings

New PGP Config

Private Key *	Upload New_company_pgp_private_key.asc	Delete
Public Key *	Upload pgp-encryption-public-key.asc	Delete
Expiration Timestamp	Never	
Passphrase Secret Key *	<input type="password" value="....."/>	

SFTP Configuration

Active SSH Config

Powered by Backflpt TIQ_ORCH_v1.9.5

- Click **Save**. Once saved, all uploaded keys and their passphrases will be displayed under the **New PGP Config** section in *View* mode. The previously active (old) keys will be shown with a **Deprecate** button.

Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration P

Servers **MFT Settings** Email & SSO Settings External Services Additional Settings

MFT Settings

PGP Configuration for Workflows

Active PGP Config

Private Key	0x1EA4D123-sec.asc	
Public Key	0x1EA4D123-pub.asc	
Expiration Timestamp	Never	
Passphrase Secret	*****	

New PGP Config

Private Key *	Upload New_company_pgp_private_key.asc	Delete
Public Key *	Upload non-encryption-public-key.asc	Delete

Powered by Backflpt TIQ_ORCH_v1.9.5



The screenshot displays the 'MFT Settings' page. At the top, there is a navigation bar with 'Configuration' selected. Below it, a sub-menu shows 'MFT Settings' as the active tab. The main content area is titled 'MFT Settings' and contains two sections: 'PGP Configuration for Workflows' and 'New PGP Config'. The 'Active PGP Config' section lists: Private Key (0x1EA4D123-sec.asc), Public Key (0x1EA4D123-pub.asc), Expiration Timestamp (Never), and Passphrase Secret (*****). A red 'Deprecate' button is located below this section. The 'New PGP Config' section lists: Private Key (New_company_pgp_private_key.asc) and Public Key (pgp-encryption-public-key.asc). The footer shows 'Powered by Backflirt' and 'TIQ_ORCH_v1.9.5'.

File Transfer Behavior During Rotation

1. During PGP key rotation, if a partner sends an encrypted file and the workflow configuration includes a PGP decrypt step
2. The decryption step uses a fallback mechanism to ensure successful decryption.
3. The system first attempts to decrypt the file using the **new PGP private key**.
4. If decryption with the New Private key fails because the partner continues to use the old key, decryption is then automatically attempted using the previously active (old) PGP key.
5. This approach enables seamless file processing during the transition period, accommodating partners who have not yet switched to the new key.

This alternating validation process — where the system switches between new and old keys — is referred to as the **ping-pong mechanism**.

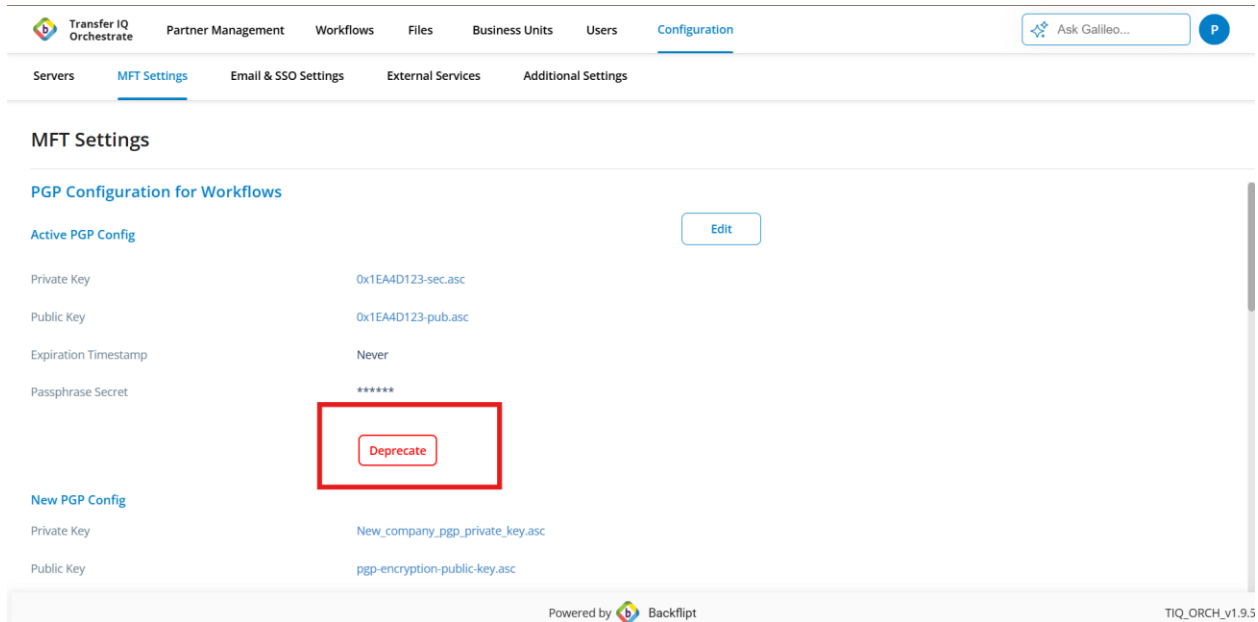
PGP Key Deprecation

Deprecating a PGP key means disabling the old PGP key, so it can no longer encrypt or decrypt files, ensuring that only the newly rotated PGP key is used for secure file transfers.

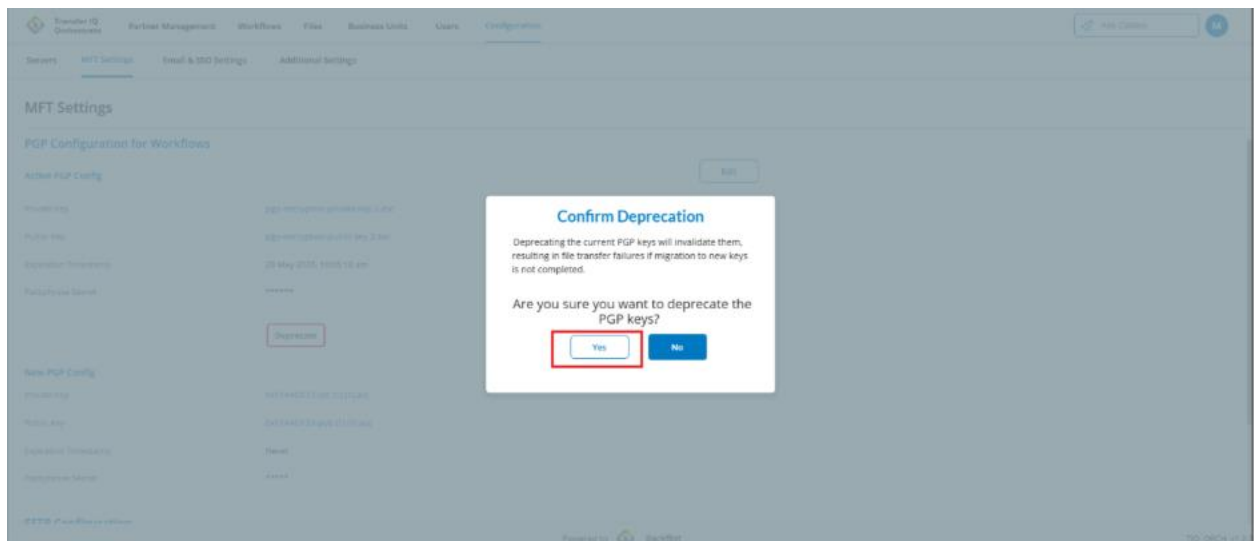
Deprecating PGP Keys

1. Navigate to the **Active PGP Keys** section in the MFT Settings tab.
2. Click the **Deprecate** button next to the old active **PGP** key.





3. A **popup** is displayed asking for confirmation to deprecate the selected key.
4. Confirm the action by clicking the **Yes button** in the popup. The system marks the key as **deprecated**, indicating it is no longer active for encrypting or decrypting new files.



5. The deprecated key is **removed completely** from the application.



File Transfer Behavior During Deprecation

1. Once a PGP key is **deprecated**, it is **removed from the system** and will **no longer be used** for decrypting any files.
2. Files encrypted with the **new PGP key** continue to be decrypted using the new key.
3. Any file encrypted with the old, deprecated key will **fail to decrypt**, ensuring only the current active key is used.

Company SSH Key Rotation

SSH key rotation ensures secure and continuous connectivity between MFT and partner servers using SFTP connectors. The process involves three distinct phases: **Before Rotation**, **During Rotation**, and **Deprecation**.

1. Before Rotation

Before initiating the key rotation process, only the **active set of SSH keys** currently in use are visible under the *MFT Settings > Active SSH Keys* section.

These keys represent the ones actively used for establishing secure SFTP connections with partner servers.



Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Servers **MFT Settings** Email & SSO Settings External Services Additional Settings

MFT Settings

Expiration Timestamp Never

Passphrase Secret *****

Rotate

SFTP Configuration

Active SSH Config Edit

Public Key company_ssh_1_1.pub

Private Key company_ssh_1

Rotate

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At this stage, the system continues to rely solely on the active keys for all ongoing file transfers and workflow executions.

2. During Rotation

1. Navigate to **MFT Settings > Active SSH Keys**.
2. Click the **Rotate** button next to the *Active SSH Keys* section.

Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Servers **MFT Settings** Email & SSO Settings External Services Additional Settings

MFT Settings

Expiration Timestamp Never

Passphrase Secret *****

Rotate

SFTP Configuration

Active SSH Config Edit

Public Key company_ssh_1_1.pub

Private Key company_ssh_1

Rotate

Powered by Backflpt TIQ_ORCH_v1.9.5



This action reveals a new section labeled **New SSH Keys**, which allows you to upload the **public** and **private** SSH keys for the new key pair.

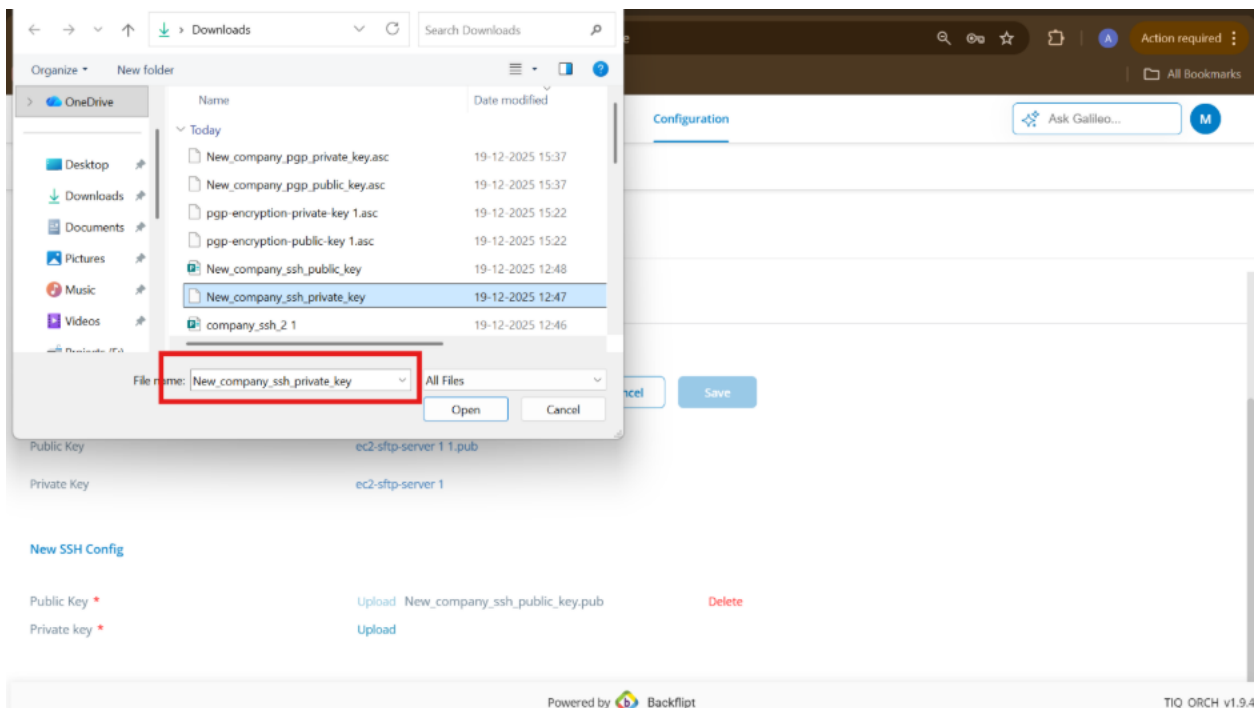
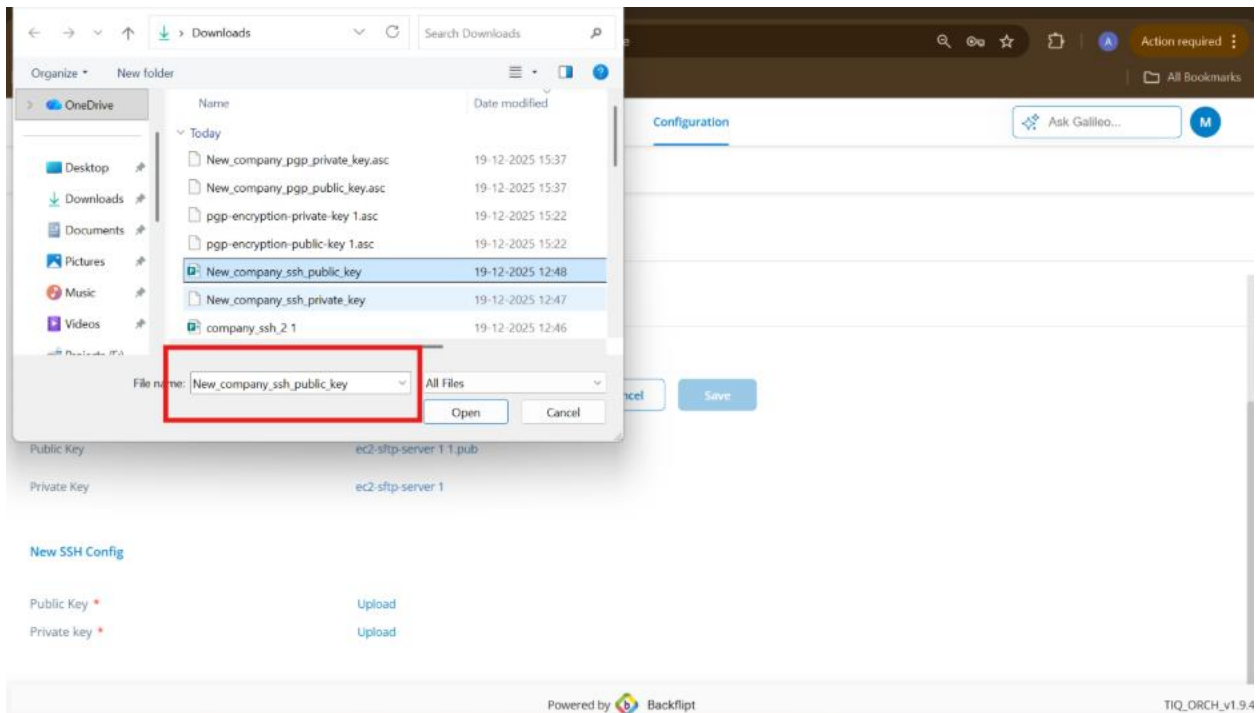
The screenshot shows the 'MFT Settings' page in the Transfer IQ Orchestrator. The navigation bar includes 'Servers', 'MFT Settings', 'Email & SSO Settings', 'External Services', and 'Additional Settings'. The 'MFT Settings' section contains a 'Passphrase Secret' field with masked characters. Below this is the 'SFTP Configuration' section, which includes 'Active SSH Config' with 'Cancel' and 'Save' buttons, and a table of existing SSH configurations. The 'New SSH Config' section is highlighted with a red box and contains two rows: 'Public Key *' with an 'Upload' button and 'Private key *' with an 'Upload' button. The footer indicates the system is powered by Backflipt and is version TIQ_ORCH_v1.9.5.

3. Under the **New SSH Keys** section, click **Upload** and select a valid SSH key file.

This screenshot is similar to the previous one, but the 'New SSH Config' section is expanded. The 'Public Key *' row now has a red box around the 'Upload' button. The 'Private key *' row also has an 'Upload' button. The rest of the page, including the navigation bar and footer, remains the same.

4. Select and open a file from the file selection dialog box





5. Once uploaded successfully, both **Active SSH Keys** and **New SSH Keys** will be displayed in the *MFT Settings* tab.



Transfer IQ Orchestrator | Partner Management | Workflows | Files | Business Units | Users | Configuration

Servers | **MFT Settings** | Email & SSO Settings | External Services | Additional Settings

MFT Settings

Passphrase Secret: *****

SFTP Configuration

Active SSH Config

Public Key	company_ssh_1_1.pub	Cancel	Save
Private Key	company_ssh_1		

New SSH Config

Public Key *	Upload	New_company_ssh_public_key.pub	Delete
Private key *	Upload	New_company_ssh_private_key	Delete

Powered by Backflpt | TIQ_ORCH_v1.9.5

6. Click the Save button to save the new SSH Keys

Transfer IQ Orchestrator | Partner Management | Workflows | Files | Business Units | Users | Configuration

Servers | **MFT Settings** | Email & SSO Settings | External Services | Additional Settings

MFT Settings

Passphrase Secret: *****

SFTP Configuration

Active SSH Config

Public Key	company_ssh_1_1.pub	Cancel	Save
Private Key	company_ssh_1		

New SSH Config

Public Key *	Upload	New_company_ssh_public_key.pub	Delete
Private key *	Upload	New_company_ssh_private_key	Delete

Powered by Backflpt | TIQ_ORCH_v1.9.5

6. Once saved, all uploaded keys and their passphrases will be displayed under the **New SSH Config** section in *View* mode. The previously active (old) keys will be shown with a **Deprecate** button.



File Transfer Behavior During Rotation

When SSH key rotation is initiated, the system determines which key to use for establishing the SFTP connection through a validation mechanism:

1. The system first attempts to establish the SFTP connection using the **new SSH key** uploaded under *MFT Settings*.
2. If the connection is **successful**, the corresponding connector's SSH private key is automatically updated with the **new key**, and all future connections will continue to use this new key.
3. If the connection **fails** with the new key, the system retries using the **existing (old) key**.
4. If the connection is **successful** with the old key, the connector continues using the old SSH key.
 - a. For **subsequent connection attempts**, the system will **prioritize the key that was last successful** (in this case, the old key) before trying the other key again.

This alternating validation process — where the system switches between new and old keys based on connection success — is referred to as the **ping-pong mechanism**.

3. Deprecation (post-rotation)



Once the new SSH keys are validated and successfully in use, the **old keys are deprecated**.

1. Navigate to the **Active SSH Keys** section in the *MFT Settings* tab.

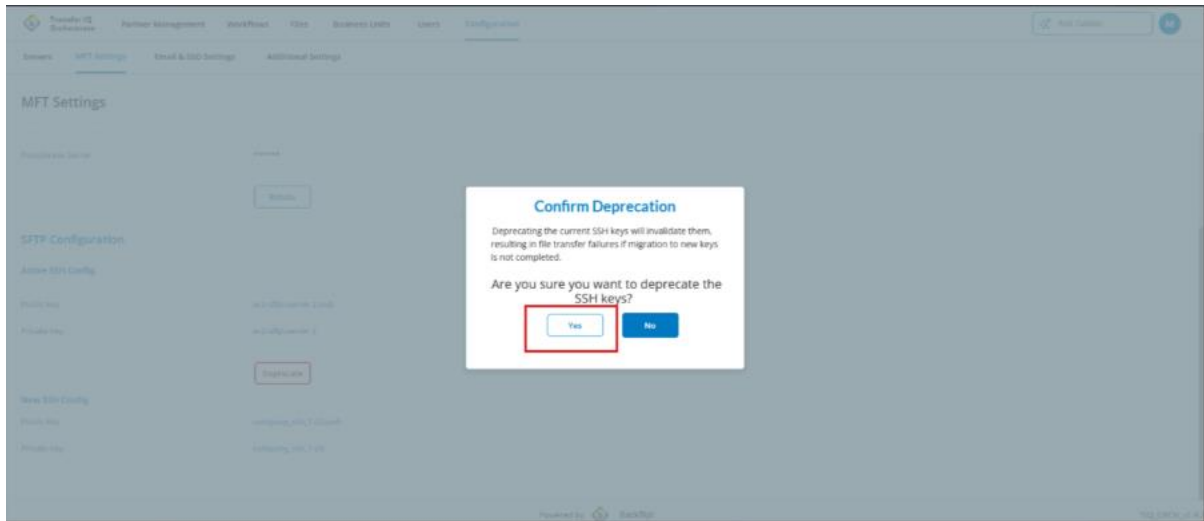
The screenshot shows the 'MFT Settings' page in the Transfer IQ Orchestrator. The navigation bar includes 'Servers', 'MFT Settings', 'Email & SSO Settings', 'External Services', and 'Additional Settings'. The 'MFT Settings' section contains fields for 'Expiration Timestamp' (Never) and 'Passphrase Secret' (*****), with a 'Rotate' button below. The 'SFTP Configuration' section has an 'Active SSH Config' link highlighted with a red box, an 'Edit' button, and fields for 'Public Key' (company_ssh_1.pub) and 'Private Key' (company_ssh_1), with a 'Rotate' button below. The footer indicates 'Powered by Backflipt' and 'TIQ ORCH v1.9.5'.

2. Click the **Deprecate** button next to the old active SSH key.

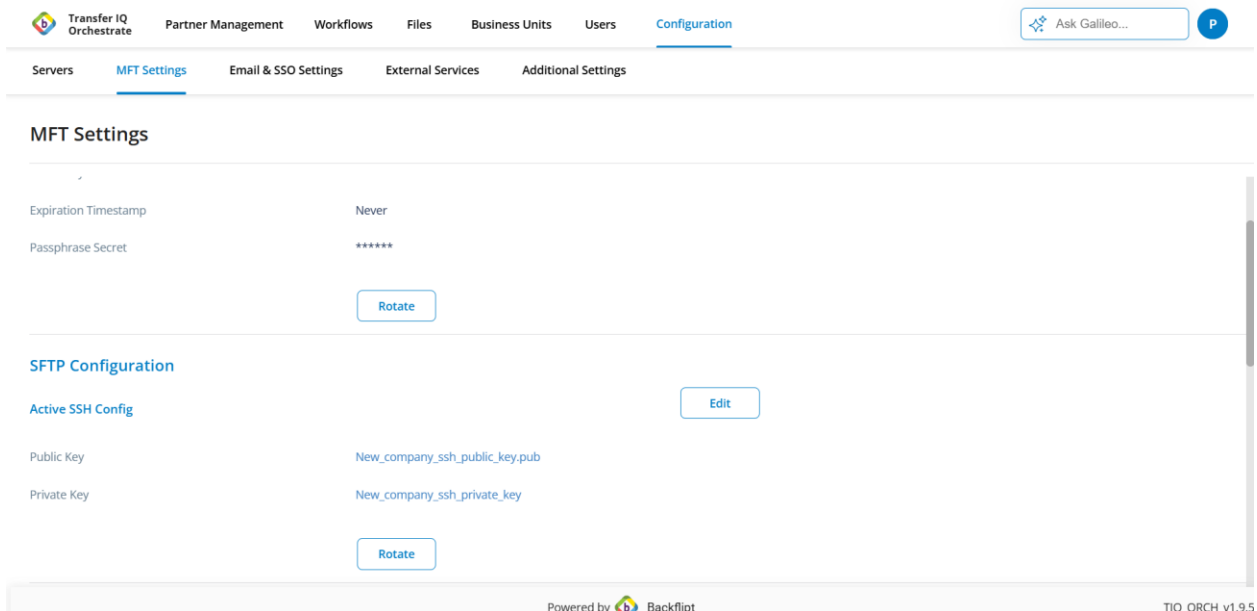
The screenshot shows the 'MFT Settings' page in the Transfer IQ Orchestrator. The navigation bar is the same as in the previous screenshot. The 'SFTP Configuration' section now shows 'Active SSH Config' with an 'Edit' button. Below it, the 'Public Key' (company_ssh_1 1.pub) and 'Private Key' (company_ssh_1) fields are shown, with a 'Deprecate' button highlighted by a red box. Below these fields is a 'New SSH Config' section with 'Public Key' (New_company_ssh_public_key.pub) and 'Private Key' (New_company_ssh_private_key) fields. The footer indicates 'Powered by Backflipt' and 'TIQ_ORCH_v1.9.5'.

3. A confirmation popup is displayed. Click **Yes** to confirm the deprecation of the selected key.





4. The system marks the key as deprecated, indicating it is no longer active for establishing SFTP connections.
5. The deprecated key is removed completely from the application.



Once the new SSH keys are validated and successfully in use, the old keys are deprecated. At this stage:

- The **Active SSH Keys** section in *MFT Settings* is updated to show only the newly active keys.



- All subsequent file transfers and SFTP connections use the rotated (new) SSH keys exclusively.

This ensures a smooth transition with no disruption to ongoing transfers while maintaining enhanced security.

Custom Step Configuration:

Configuring Authentication Token in MFT Settings Tab:

The callback URL and authentication key, which the company uses to receive responses from the external service, will be specified in the Custom step Configuration section of the MFT settings tab

This section consists of two input fields:

- Callback URL – This field is pre-populated with a default value when the Orchestrate application is deployed.
- Authentication Token – The company provides the authentication token in this field.

To configure custom step configuration, follow the below steps

1. Navigate to Configuration > MFT Settings
2. Navigate to Custom Step Configuration in MFT Settings Tab
3. Click edit to enter the authentication token

The screenshot displays the 'MFT Settings' configuration page. At the top, there is a navigation bar with 'Configuration' selected. Below it, a sub-menu shows 'MFT Settings' as the active tab. The main content area is divided into two sections. The first section, 'Active Message Signing Certificate', includes fields for 'Private Key' (value: signing_private_key.pem), 'Public Certificate' (value: signing_certificate (4).pem), and 'Expiration Timestamp' (value: 04 Nov 2026, 03:59:18 pm). A 'Rotate' button is located below these fields. The second section, 'Custom Step Configuration', shows a 'Callback URL' (value: https://qa-orchestrate.xeninc.us/callback/webhook) and an 'Authorization API Key' (value: *****). An 'Edit' button is highlighted with a red box in this section. The footer of the page includes 'Powered by Backflipt' and the version 'TIQ_ORCH_v1.9.5'.



4. Provide the authentication token and Click save

The screenshot shows the 'MFT Settings' page in the Transfer IQ Orchestrator. The 'Active Message Signing Certificate' section contains the following details:

Private Key	signing_private_key.pem
Public Certificate	signing_certificate (4).pem
Expiration Timestamp	04 Nov 2026, 03:59:18 pm

The 'Custom Step Configuration' section includes:

- Callback URL: `https://qa-orchestrate.xeninc.us/callback/webhook`
- Authorization API Key: `https://qa-orchestrate.xeninc.us/callback/webhook` (masked with asterisks)

A red box highlights the 'Save' button in the Custom Step Configuration section.

Once the details are saved, the details will be displayed in the **View** mode, with the authentication token masked.

The screenshot shows the 'MFT Settings' page in the Transfer IQ Orchestrator, now in 'View' mode. The details are as follows:

Private Key	signing_private_key.pem	Rotate
Public Certificate	signing_certificate (4).pem	
Expiration Timestamp	04 Nov 2026, 03:59:18 pm	

The 'Custom Step Configuration' section includes:

- Callback URL: `https://qa-orchestrate.xeninc.us/callback/webhook`
- Authorization API Key: `*****` (masked)

An 'Edit' button is visible in the Custom Step Configuration section.

Configuring Callback Time:

- When an external service is invoked, it may return either a **success** or **failure** response based on how the request is processed.



- If no response is received from the external service, the workflow transitions into a **suspended** state.
- In the suspended state, workflow execution is **paused**, and no further steps are processed until a response is received or manual action is taken.
- While suspended, the workflow status is displayed as **“Waiting for Response”** in the **Track tab**.
- The application waits for a callback from the external service based on the **callback time** configured in the **Additional Settings** section of the custom step configuration.
- The **Additional Settings** section allows configuration of the callback time in **hours**.
- When the workflow enters the suspended state, the record is **displayed immediately** in the Track tab with the status **“Waiting for Response.”**
- The system continues to wait for the external service response for the duration specified in the callback time in hours.
- Once the configured callback time is reached, the Track tab displays the available actions:
 - **Retry**
 - **Continue to Next Step**
 - **Terminate Workflow** (mark as failure)
- These actions allow **admins** to manually decide how the suspended workflow should proceed.

To configure the callback time, follow the below steps

1. Navigate to Configuration > MFT Settings > Custom Step Configuration
2. Navigate to Additional Settings Sections in Custom Step Configuration
3. Click the Edit button



Transfer IQ Orchestrate Partner Management Workflows Files Business Units Users Configuration P

Servers **MFT Settings** Email & SSO Settings External Services Additional Settings

MFT Settings

Expiration Timestamp 02 Feb 2028, 09:03:22 pm Rotate

Custom Step Configuration [Help](#)

Callback service Edit

Callback URL https://qa-orchestrate.xeninc.us/callback/webhook

Authorization API Key *****

Additional Settings Edit

Callback Timeout (in hours)

Powered by Backflip TIQ_ORCH_v1.9.5

4. Configure the Callback Time in hours

Transfer IQ Orchestrate Partner Management Workflows Files Business Units Users Configuration P

Servers **MFT Settings** Email & SSO Settings External Services Additional Settings

MFT Settings

Private Key signing_private_key 1.pem

Public Certificate signing_certificate.pem

Expiration Timestamp 04 Nov 2026, 03:59:18 pm

Custom Step Configuration [Help](#)

Callback service

Callback URL https://qa-orchestrate.xeninc.us/callback/webhook

Authorization API Key *****

Additional Settings Cancel Save

Callback Timeout (in hours)

Powered by Backflip TIQ_ORCH_v1.9.6

5. Once configured, Click the Save



Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Servers **MFT Settings** Email & SSO Settings External Services Additional Settings

MFT Settings

Private Key signing_private_key 1.pem
 Public Certificate signing_certificate.pem
 Expiration Timestamp 04 Nov 2026, 03:59:18 pm

Custom Step Configuration [Help](#)

Callback service

Callback URL https://iq-orchestrator.xeninc.us/callback/webhook
 Authorization API Key *****

Additional Settings

Callback Timeout (in hours) 3

Cancel Save

Powered by Backflpt TIQ_ORCH_v1.9.6

6. Once saved the callback time will be displayed in view mode

Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Servers **MFT Settings** Email & SSO Settings External Services Additional Settings

MFT Settings

Public Certificate signing_certificate.pem
 Expiration Timestamp 04 Nov 2026, 03:59:18 pm

Rotate

Custom Step Configuration [Help](#)

Callback service Edit

Callback URL https://iq-orchestrator.xeninc.us/callback/webhook
 Authorization API Key *****

Additional Settings Edit

Callback Timeout (in hours) 3

Powered by Backflpt TIQ_ORCH_v1.9.6

Note: If the callback time is not configured, it will default to 2 hours.

Callback API Help:

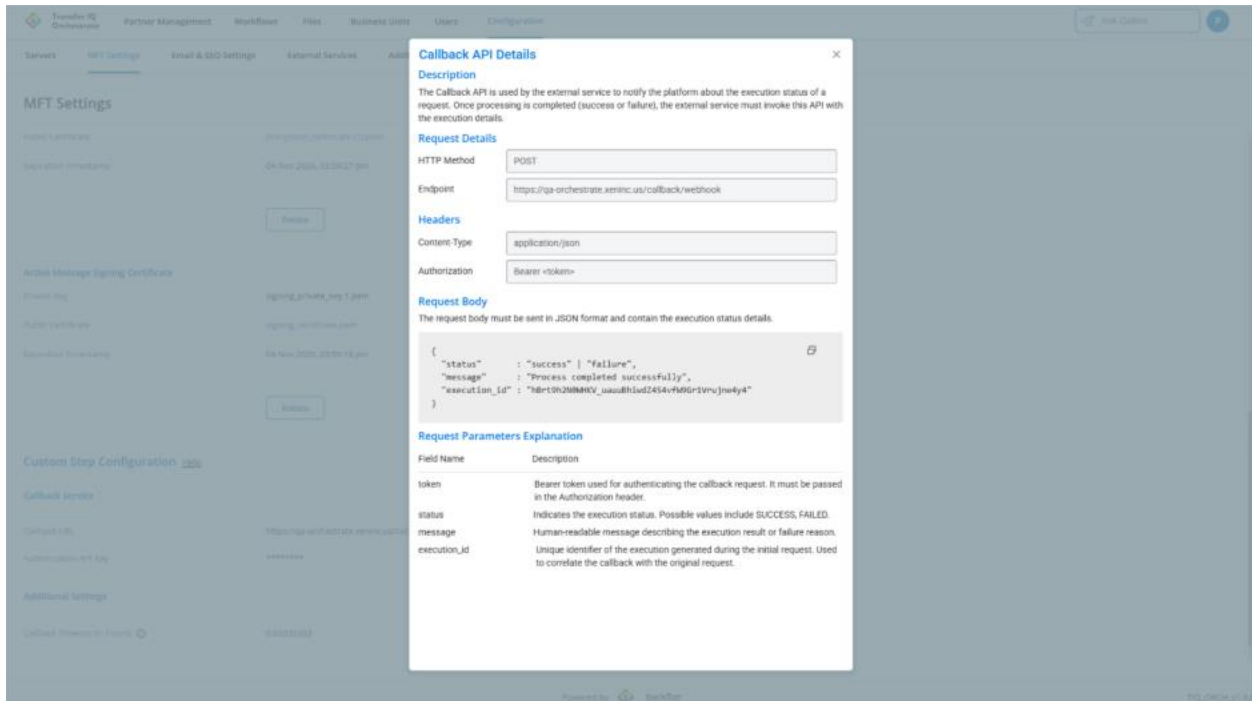
- Clicking the Help link in the Custom Step Configuration opens the Callback API Details popup.



The screenshot displays the 'MFT Settings' configuration page. It is divided into two main sections: 'Public Certificate' and 'Custom Step Configuration'. The 'Public Certificate' section shows a certificate file named 'signing_certificate.pem' with an expiration timestamp of '04 Nov 2026, 03:59:18 pm' and a 'Rotate' button. The 'Custom Step Configuration' section, which is highlighted with a red box, contains a 'Callback service' section with an 'Edit' button. This section lists a 'Callback URL' as 'https://qa-orchestrator.xeniinc.us/callback/webhook' and an 'Authorization API Key' as '*****'. Below this is an 'Additional Settings' section with an 'Edit' button, showing a 'Callback Timeout (in hours)' of '0.03333333'. The footer of the page includes the text 'Powered by Backflpt' and the version number 'TIQ_ORCH_v1.9.4'.

- The purpose of this popup is to explain how the external service should notify the platform about the execution status of a request.
- It details the HTTP method and endpoint URL that the external service must use to send the callback.
- It describes the required headers, including the Authorization token, which is the same token specified in the Custom Step Configuration. This token authenticates the callback request.
- The popup also explains key request parameters used to communicate the execution status and link the callback with the original workflow request.
- This ensures the external service sends properly formatted and authenticated callback responses to the orchestrator





AS2 Protocol

When only the AS2 protocol is deployed, clicking on *MFT Settings* in the Configuration tab will navigate to the MFT Settings section, where only the Message Encryption Certificates and Message Signing Certificates are present as certificates.

By default, the page shows an empty state with the following fields in AS2 Server Configuration:

It includes the following sections:

1. Local Profile
2. Active Message Encryption Certificates
3. Active Message Signing Certificates



The screenshot displays the 'MFT Settings' page in the Transfer IQ Orchestrator. The navigation bar at the top includes 'Transfer IQ Orchestrator', 'Partner Management', 'Workflows', 'Files', 'Business Units', 'Users', and 'Configuration'. The 'Configuration' menu is expanded to show 'MFT Settings', 'Email & SSO Settings', 'External Services', and 'Additional Settings'. The main content area is titled 'MFT Settings' and contains three sections: 'AS2 Server Configuration' with a 'Local Profile' section (including 'Profile Name' and 'AS2 ID' fields and a 'Create' button), 'Active Message Encryption Certificate' (with 'Private Key', 'Public Certificate', and 'Expiration Timestamp' fields and an 'Edit' button), and 'Active Message Signing Certificate' (with 'Private Key', 'Public Certificate', and 'Expiration Timestamp' fields and an 'Edit' button'). The footer indicates the system is 'Powered by Backflpt' and version 'TIQ_ORCH_v1.9.5'.

Local Profile:

The **Local Profile** defines the company's identity for AS2 communication. It includes the following fields:

- **Profile Name**
- **AS2 ID**

Creating the Local Profile

1. Navigate to **Configuration** → **MFT Settings** → **Local Profile**.
2. The page appears blank when no profile is configured.
3. Click Create



Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Servers **MFT Settings** Email & SSO Settings External Services Additional Settings

MFT Settings

AS2 Server Configuration

Local Profile Create

Profile Name
AS2 ID

Active Message Encryption Certificate

Edit

Private Key
Public Certificate
Expiration Timestamp

Powered by Backflpt TIQ_ORCH_v1.9.5

4. Enter the following details:
 - a. **Profile Name**
 - b. **AS2 ID**

Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Servers **MFT Settings** Email & SSO Settings External Services Additional Settings

MFT Settings

Private Key

AS2 Server Configuration

Local Profile Cancel Save

Profile Name

AS2 ID

Active Message Encryption Certificate

Private Key
Public Certificate
Expiration Timestamp

Powered by Backflpt TIQ_ORCH_v1.9.5

5. Click **Save**.



Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Servers **MFT Settings** Email & SSO Settings External Services Additional Settings

MFT Settings

Private Key

AS2 Server Configuration

Local Profile

Profile Name

AS2 ID

Cancel Save

Active Message Encryption Certificate

Private Key

Public Certificate

Expiration Timestamp

Powered by Backflip TIQ_ORCH_v1.9.5

Outcome:

1. The Local Profile is created in the application.

Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Servers **MFT Settings** Email & SSO Settings External Services Additional Settings

MFT Settings

AS2 Server Configuration

Local Profile Edit

Profile Name Company-AS2-Profile

AS2 ID Company-AS2-id

Active Message Encryption Certificate

Private Key

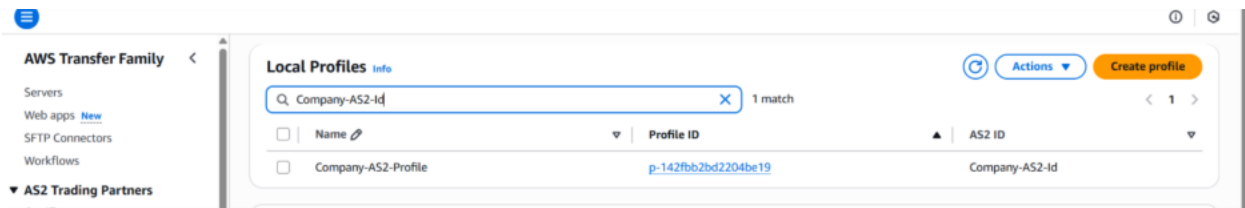
Public Certificate

Expiration Timestamp

Powered by Backflip TIQ_ORCH_v1.9.5

2. The same profile is automatically created under **AWS Transfer Family** → **Servers** to maintain consistency between the application and AWS.

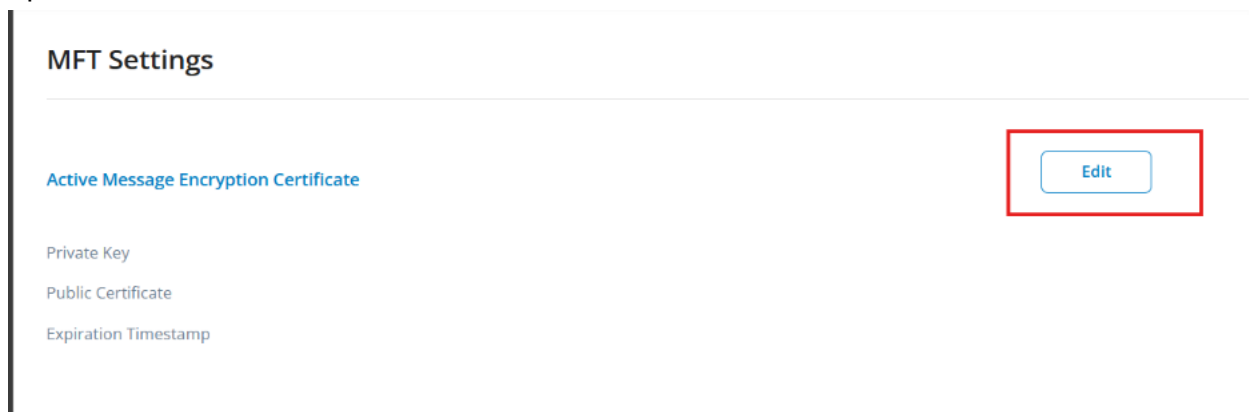




3. After creation, the **AS2 ID becomes locked and cannot be modified.**
4. A Local Profile **must be created before** configuring AS2 Agreements, as it represents the company during all AS2 exchanges.
5. The AS2 ID must be **unique**, as trading partners use this value to identify your company.

Message Encryption Certificates

1. Navigate to the Message Encryption Certificates to upload Message Encryption Certificates
2. At the top right, an Edit button is available in the Message Encryption Certificates Section
3. When the user clicks **Edit**, Super Admin can upload valid Certificates by clicking the upload button.



4. This section contains of the below certificates:
 - a. Message Encryption Public Certificate
 - b. Message Encryption Private Key



MFT Settings

Active Message Encryption Certificate

Private Key * Upload

Public Certificate * Upload

Cancel Save

Transfer IQ Orchestrate Partner Management Workflows Files Business Units Users Configuration P

Servers **MFT Settings** Email & SSO Settings External Services Additional Settings

MFT Settings

Active Message Encryption Certificate

Private Key * Upload encryption_private_key.pem Delete

Public Certificate * Upload encryption_certificate (2).pem Delete

Active Message Signing Certificate

Private Key

Public Certificate

Expiration Timestamp

Powered by Backflit TIQ_ORCH_v1.9.5

5. Click Save



Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Servers **MFT Settings** Email & SSO Settings External Services Additional Settings

MFT Settings

Active Message Encryption Certificate

Private Key * Upload encryption_private_key.pem Cancel Save Delete

Public Certificate * Upload encryption_certificate (2).pem Delete

Active Message Signing Certificate

Private Key

Public Certificate

Expiration Timestamp

Powered by Backflipt TIQ_ORCH_v1.9.5

- Once the save button is clicked both the public and private encryption certificates will be merged into a single certificate and attached to the Local Profile

Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Servers **MFT Settings** Email & SSO Settings External Services Additional Settings

MFT Settings

Active Message Encryption Certificate

Private Key encryption_private_key.pem Edit

Public Certificate encryption_certificate (2).pem

Expiration Timestamp 04 Nov 2026, 03:59:27 pm

Rotate

Active Message Signing Certificate

Private Key

Public Certificate

Expiration Timestamp

Powered by Backflipt TIQ_ORCH v1.9.5



The screenshot shows the AWS Transfer Family console interface. On the left is a navigation sidebar with options like 'Servers', 'Web apps', 'SFTP Connectors', 'Workflows', 'AS2 Trading Partners', 'Certificates', 'Profiles', 'Agreements to receive messages', 'Connectors to send messages', 'Feature Spotlight', 'What's New', 'Documentation', and 'About servers'. The main content area is titled 'Profile description' for profile 'p-142fbb2bd2204be19'. It shows the profile name 'Company-AS2-Profile' and AS2 ID 'Company-AS2-Id'. Below this is a notification banner about setting up automated notifications for certificate expiry. The 'Certificates (1)' section is highlighted with a red box and contains a table with the following data:

Name	Description	Certificate...	Usage	Status	Active date	Inactive d...	Certificate ID
CERTIFICATE...	-		ENCRYPTION	ACTIVE	2025-10-30	2028-02-02	cert-97ac5769cb3f...

Below the table, there are 'Tags (4)' and an 'Import certificate' button.

Message Encryption Public Certificate

1. This is the public part of the certificate used to **encrypt AS2 messages**.
2. When a partner needs to send AS2 files to the company, the company provides this **encryption public certificate** to the partner.
3. The partner uses this certificate to **encrypt the AS2 message** before sending it. Once encrypted, the message cannot be viewed or read by anyone else on the network.
4. Since it is a **public key**, it is safe to share with external partners. Its only purpose is to allow partners to encrypt messages that **only the company can decrypt**.

Message Encryption Private Key:

1. This is the private key that matches the public encryption certificate.
2. The company keeps this key **secure and confidential** and never shares it.
3. When the company receives an encrypted AS2 message from a partner, the company uses this **private key** to decrypt the message and read its contents.



Message Signing Certificates:

1. Navigate to the Message Signing Certificates section to upload Message Signing Certificates
2. At the top right, an Edit button is available in the Message Signing Certificates Section
3. When the user clicks **Edit**, Super Admin can upload valid Certificates by clicking the upload button

The screenshot shows the 'MFT Settings' page in the Transfer IQ Orchestrator. The navigation bar includes 'Servers', 'MFT Settings', 'Email & SSO Settings', 'External Services', and 'Additional Settings'. The 'MFT Settings' section is divided into two parts:

- Active Message Encryption Certificate:** This section displays the following details:
 - Private Key: encryption_private_key.pem
 - Public Certificate: encryption_certificate (2).pem
 - Expiration Timestamp: 04 Nov 2026, 03:59:27 pmA 'Rotate' button is located below these details.
- Active Message Signing Certificate:** This section has an 'Edit' button highlighted with a red box.

4. This section contains of the below certificates:
 - a. Message Signing Public Certificate
 - b. Message Signing Private Key



Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration P

Servers **MFT Settings** Email & SSO Settings External Services Additional Settings

MFT Settings

Active Message Encryption Certificate

Private Key	encryption_private_key.pem
Public Certificate	encryption_certificate (2).pem
Expiration Timestamp	04 Nov 2026, 03:59:27 pm

Active Message Signing Certificate

Private Key *	Upload
Public Certificate *	Upload

Powered by Backflpt TIQ_ORCH_v1.9.5

Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration P

Servers **MFT Settings** Email & SSO Settings External Services Additional Settings

MFT Settings

Active Message Encryption Certificate

Private Key	encryption_private_key.pem
Public Certificate	encryption_certificate (2).pem
Expiration Timestamp	04 Nov 2026, 03:59:27 pm

Active Message Signing Certificate

Private Key *	Upload Company_encryption_private_key.pem	<input type="button" value="Delete"/>
Public Certificate *	Upload Company_encryption_certificate.pem	<input type="button" value="Delete"/>

Powered by Backflpt TIQ_ORCH_v1.9.5

5. Click Save



6. Once the save button is clicked both the public and private signing certificates will be merged into a single certificate and attached to the Local Profile

Message Signing Private Key:

1. This private key is used by the company to **digitally sign outgoing AS2 messages**.
2. When the company sends a file to a partner, it uses this private key to create a **digital signature**. This signature proves two things:



- a. The file genuinely came from the company.
 - b. The file was not altered during transmission.
3. This private signing key must be kept secure and should never be shared.

Message Signing Public Certificate:

1. This is the public part of the signing certificate.
2. The company shares this public signing certificate with its partners so they can **verify the digital signature** for incoming messages from the company.
3. When the partner receives a signed AS2 message, partners use this public key to confirm that:
 - a. The message was really sent by the company.
 - b. The message was not changed or tampered with on the way.
4. Since it is a **public certificate**, it is safe to share with external partners.

Key Rotation for AS2

Key rotation in MFT for AS2 is the process of periodically replacing old Encryption & Signing Certificates of Company.

Company Message Encryption Certificates Rotation

Before rotation, only the **Active Encryption Certificates** section is visible, displaying the currently in-use Certificates.

The process involves three distinct phases: **Before Rotation**, **During Rotation**, and **Deprecation**



Before Rotation:

1. Only **one encryption certificate** is present in the **MFT Settings** tab.
2. A **single certificate pair** (public + private key) is attached to the **Enterprise Local Profile**.
3. **Decryption is successful only when** the partner profile on the partner server contains **the same public certificate** corresponding to the private key used for decryption.
4. When the partner uses this certificate for encryption and sends the file, decryption completes successfully.

During Rotation

To begin the rotation process

1. Navigate to **MFT Settings > Active Message Encryption Certificate**
2. Click the **Rotate** button located next to the **Active Message Encryption Certificate**

The screenshot displays the 'MFT Settings' page in a web application. The navigation bar at the top includes 'Transfer IQ Orchestrate', 'Partner Management', 'Workflows', 'Files', 'Business Units', 'Users', and 'Configuration'. Below the navigation bar, there are tabs for 'Servers', 'MFT Settings', 'Email & SSO Settings', 'External Services', and 'Additional Settings'. The main content area is titled 'MFT Settings' and contains a table with the following information:

Expiration Timestamp	04 Nov 2026, 03:59:27 pm	
		Rotate
Active Message Signing Certificate		Edit
Private Key	Company_encryption_private_key.pem	
Public Certificate	Company_encryption_certificate.pem	
Expiration Timestamp	04 Nov 2026, 05:53:11 pm	
		Rotate

The 'Rotate' button in the second row is highlighted with a red rectangle. At the bottom of the page, it says 'Powered by Backflpt' and 'TIQ_ORCH_v1.9.5'.

3. This action displays an additional section labeled **New Message Encryption Certificate** which includes fields for uploading both **public** and **private** Encryption Certificates.



Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Servers **MFT Settings** Email & SSO Settings External Services Additional Settings

MFT Settings

Active Message Signing Certificate Cancel Save

Private Key Company_encryption_private_key.pem

Public Certificate Company_encryption_certificate.pem

Expiration Timestamp 04 Nov 2026, 05:53:11 pm

New Message Signing Certificate

Private Key * Upload

Public Certificate * Upload

Powered by Backflpt TIQ_ORCH_v1.9.5

- To upload the **New Message Encryption Certificate**, click the **Upload** button under the **New Message Encryption Certificate** section.

Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Servers **MFT Settings** Email & SSO Settings External Services Additional Settings

MFT Settings

Active Message Signing Certificate Cancel Save

Private Key Company_encryption_private_key.pem

Public Certificate Company_encryption_certificate.pem

Expiration Timestamp 04 Nov 2026, 05:53:11 pm

New Message Signing Certificate

Private Key * Upload

Public Certificate * Upload

Powered by Backflpt TIQ_ORCH_v1.9.5

- In the file selection dialog, choose a valid Certificate file.
- Once the file is uploaded successfully, the newly uploaded keys are displayed in the **MFT Settings** tab under the **New Message Encryption Certificates** section



Transfer IQ Orchestrator | Partner Management | Workflows | Files | Business Units | Users | Configuration

Servers | **MFT Settings** | Email & SSO Settings | External Services | Additional Settings

MFT Settings

Active Message Signing Certificate [Cancel] [Save]

Private Key: Company_encryption_private_key.pem

Public Certificate: Company_encryption_certificate.pem

Expiration Timestamp: 04 Nov 2026, 05:53:11 pm

New Message Signing Certificate

Private Key * [Upload] New_encryption_private_key (1).pem [Delete]

Public Certificate * [Upload] New_encryption_certificate.pem [Delete]

Powered by Backflpt | TIQ_ORCH_v1.9.5

7. Click **Save**. Once saved, all uploaded certificates will be displayed under the **New Message Encryption Certificate** section in *View* mode. The previously active (old) certificates will be shown with a **Deprecate** button.

Transfer IQ Orchestrator | Partner Management | Workflows | Files | Business Units | Users | Configuration

Servers | **MFT Settings** | Email & SSO Settings | External Services | Additional Settings

MFT Settings

Active Message Signing Certificate [Cancel] [Save]

Private Key: Company_encryption_private_key.pem

Public Certificate: Company_encryption_certificate.pem

Expiration Timestamp: 04 Nov 2026, 05:53:11 pm

New Message Signing Certificate

Private Key * [Upload] New_encryption_private_key (1).pem [Delete]

Public Certificate * [Upload] New_encryption_certificate.pem [Delete]

Powered by Backflpt | TIQ_ORCH_v1.9.5

File Transfer Behavior During Rotation

1. **Two encryption certificates** (old and new) are visible in the **MFT Settings** tab.
2. After rotation, the **new certificate pair** is added to the **Enterprise Local Profile** along with the old certificate pair



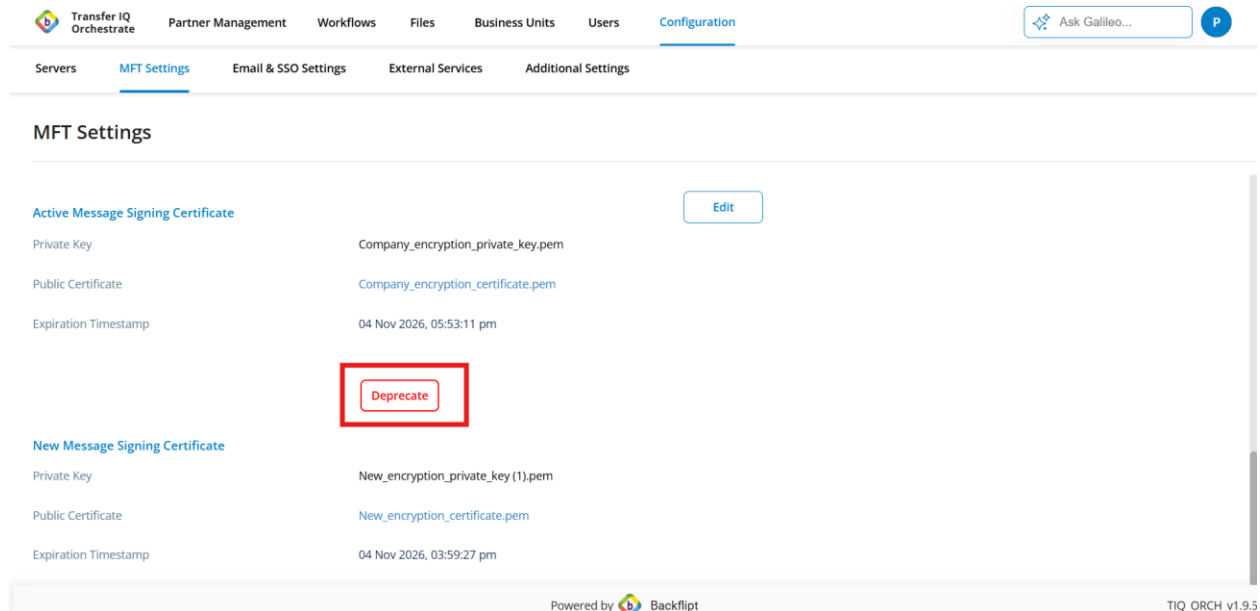
3. **Decryption succeeds** if the partner profile on the partner server contains:
 - a. **either** the old certificate,
 - b. **or** the new certificate,
 - c. **or both certificates**.
4. If the file is encrypted using any of the certificates available on the partner server, the system can decrypt it successfully using the corresponding private key.

Message Encryption Certificates Deprecation

Deprecating a Certificate means disabling the old Certificate, so it can no longer encrypt or decrypt files, ensuring that only the newly rotated Encryption Certificate is used for secure file transfers.

Deprecating Message Encryption Certificates

1. Navigate to the **Active Message Encryption Certificates** section in the MFT Settings tab.
2. Click the **Deprecate** button next to the old active **Message Encryption Certificates**



The screenshot shows the 'MFT Settings' page with a navigation bar at the top containing 'Servers', 'MFT Settings', 'Email & SSO Settings', 'External Services', and 'Additional Settings'. The 'MFT Settings' section is active. It displays two certificate entries:

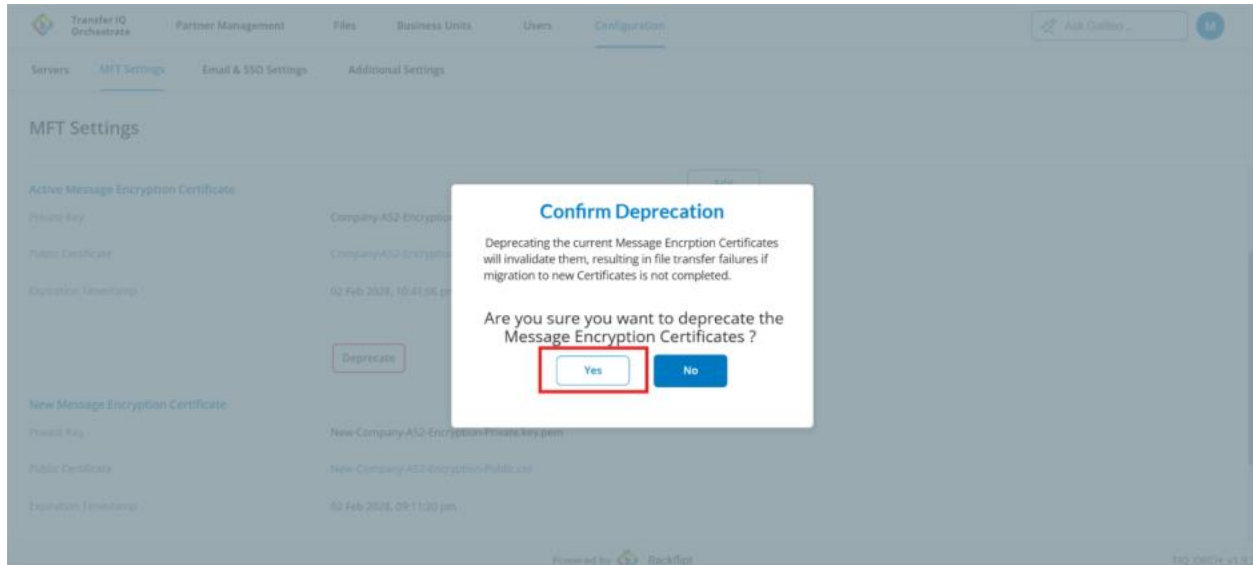
- Active Message Signing Certificate:** Includes fields for Private Key (Company_encryption_private_key.pem), Public Certificate (Company_encryption_certificate.pem), and Expiration Timestamp (04 Nov 2026, 05:53:11 pm). An 'Edit' button is present to the right. A red box highlights a 'Deprecate' button below this entry.
- New Message Signing Certificate:** Includes fields for Private Key (New_encryption_private_key (1).pem), Public Certificate (New_encryption_certificate.pem), and Expiration Timestamp (04 Nov 2026, 03:59:27 pm).

At the bottom of the page, it says 'Powered by Backflipt' and 'TIQ_ORCH_v1.9.5'.

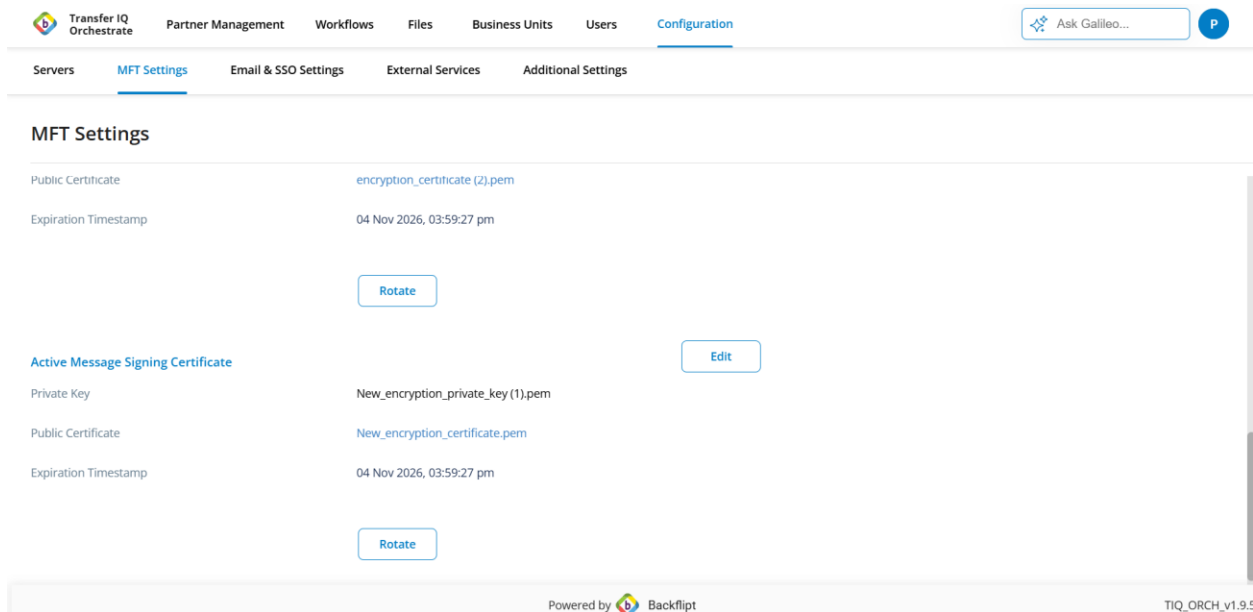
3. A **popup** is displayed asking for confirmation to deprecate the selected key.



4. Confirm the action by clicking the **Yes button** in the popup. The system marks the key as **deprecated**, indicating it is no longer active for encrypting or decrypting new files.



5. The deprecated certificate is **removed completely** from the application.



File Transfer Behavior During Deprecation

1. Only the **new encryption certificate set** remains in the **MFT Settings** tab.



2. The **Enterprise Local Profile** holds **only the new certificate pair**, and the deprecated (old) certificate set is removed.
3. **Decryption is successful only if** the partner profile on the partner server contains the **newly rotated public certificate** and sends the encrypted file using this updated key.

Company Message Signing Certificates Rotation

Before rotation, only the **Active Signing Certificates** section is visible, displaying the currently in-use Certificates.

The process involves three distinct phases: **Before Rotation**, **During Rotation**, and **Deprecation**

Before Rotation:

1. Only **one certificate** is present in the **MFT Settings** tab.
2. A **single certificate pair** (public + private key) is attached to the **Enterprise Local Profile**.
3. **All outbound signing** is performed **using the active private key**.
4. As long as the partner uses the **public key that corresponds to this private key**, the partner can **successfully verify the digital signature**.

During Rotation

To begin the rotation process

1. Navigate to **MFT Settings > Active Message Signing Certificate**
2. Click the **Rotate** button located next to the **Active Message Signing Certificate**



Transfer IQ Orchestrator | Partner Management | Workflows | Files | Business Units | Users | Configuration

Servers | **MFT Settings** | Email & SSO Settings | External Services | Additional Settings

MFT Settings

Expiration Timestamp: 04 Nov 2026, 03:59:27 pm

[Rotate](#)

Active Message Signing Certificate [Edit](#)

Private Key: New_encryption_private_key(1).pem

Public Certificate: New_encryption_certificate.pem

Expiration Timestamp: 04 Nov 2026, 03:59:27 pm

[Rotate](#)

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3. This action displays an additional section labeled **New Message Signing Certificate** which includes fields for uploading both **public** and **private** Signing Certificates
4. To upload the **New Message Signing Certificate**, click the **Upload** button under the **New Message Signing Certificate** section

Transfer IQ Orchestrator | Partner Management | Workflows | Files | Business Units | Users | Configuration

Servers | **MFT Settings** | Email & SSO Settings | External Services | Additional Settings

MFT Settings

[Cancel](#) [Save](#)

Private Key: New_encryption_private_key(1).pem

Public Certificate: New_encryption_certificate.pem

Expiration Timestamp: 04 Nov 2026, 03:59:27 pm

New Message Signing Certificate

Private Key * [Upload](#)

Public Certificate * [Upload](#)

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5. In the file selection dialog, choose a valid Signing Certificate.
6. Once the file is uploaded successfully, the newly uploaded keys are displayed in the **MFT Settings** tab under the **New Message Signing Certificates** section



Transfer IQ Orchestrator | Partner Management | Workflows | Files | Business Units | Users | Configuration

Servers | **MFT Settings** | Email & SSO Settings | External Services | Additional Settings

MFT Settings

Active Message Signing Certificate [Cancel] [Save]

Private Key	New_encryption_private_key (1).pem
Public Certificate	New_encryption_certificate.pem
Expiration Timestamp	04 Nov 2026, 03:59:27 pm

New Message Signing Certificate

Private Key *	Upload signing_private_key.pem	Delete
Public Certificate *	Upload signing_certificate (4).pem	Delete

Powered by Backflipt | TIQ_ORCH_v1.9.5

7. Click **Save**.

Transfer IQ Orchestrator | Partner Management | Workflows | Files | Business Units | Users | Configuration

Servers | **MFT Settings** | Email & SSO Settings | External Services | Additional Settings

MFT Settings

Active Message Signing Certificate [Cancel] [Save]

Private Key	New_encryption_private_key (1).pem
Public Certificate	New_encryption_certificate.pem
Expiration Timestamp	04 Nov 2026, 03:59:27 pm

New Message Signing Certificate

Private Key *	Upload signing_private_key.pem	Delete
Public Certificate *	Upload signing_certificate (4).pem	Delete

Powered by Backflipt | TIQ_ORCH_v1.9.5

- Once saved, all uploaded keys and their passphrases will be displayed under the **New Message Signing Certificate** section in *View* mode with an expiration timestamp.
- The previously active (old) certificates will be shown with a **Deprecate** button.



The screenshot displays the 'MFT Settings' configuration page. At the top, there is a navigation bar with 'Configuration' selected. Below it, a sub-navigation bar shows 'MFT Settings' as the active tab. The main content area is divided into two sections:

- Active Message Signing Certificate:** This section includes an 'Edit' button. It lists:
 - Private Key: New_encryption_private_key (1).pem
 - Public Certificate: New_encryption_certificate.pem
 - Expiration Timestamp: 04 Nov 2026, 03:59:27 pm
- New Message Signing Certificate:** This section includes a 'Deprecate' button. It lists:
 - Private Key: signing_private_key.pem
 - Public Certificate: signing_certificate (4).pem
 - Expiration Timestamp: 04 Nov 2026, 03:59:18 pm

The footer of the page contains the text 'Powered by Backflpt' and 'TIQ_ORCH_v1.9.5'.

File Transfer Behavior During Rotation

1. **Two certificates** are visible in the **MFT Settings** tab.
2. Once the certificates are rotated, the **new certificate pair** is also attached to the **Enterprise Local Profile**, along with the old one.
3. Out of the two available certificates, **the certificate with the later expiration date (with more validity) is used** for signing outgoing messages from enterprise to partner.
4. If the partner contains the certificate that has more validity (either newly rotated certificate or old existing certificate) then the signature verification is becoming successful

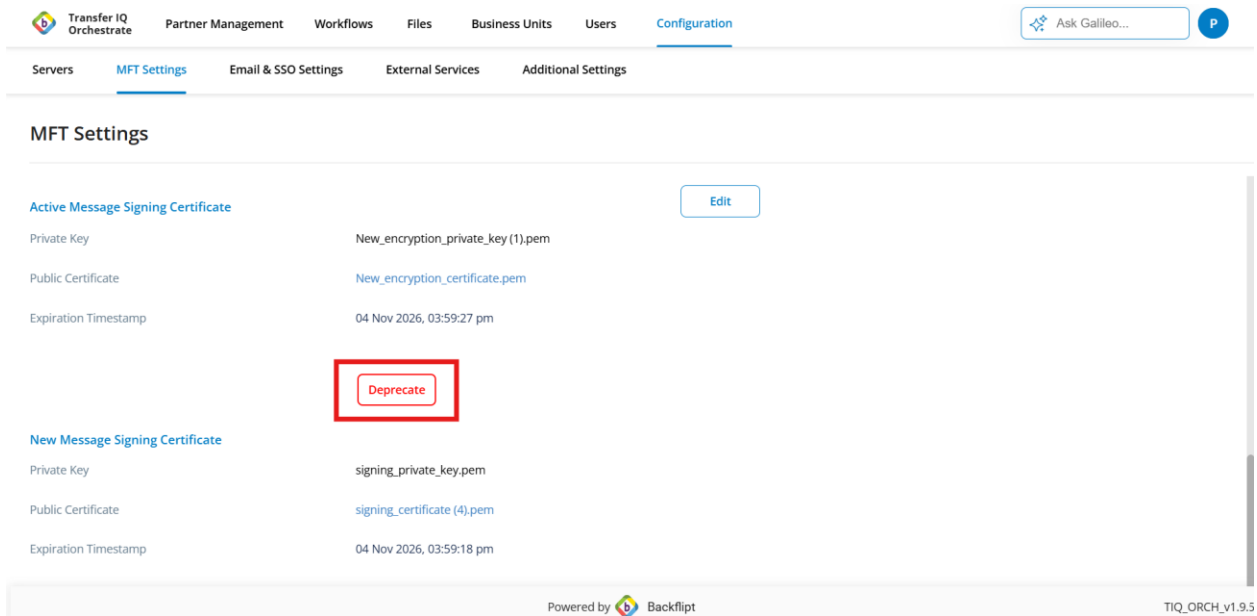
Message Signing Certificates Deprecation

Deprecating a Certificate means disabling the old Certificate, so it can no longer be used for signing outgoing messages, ensuring that only the newly rotated Signing Certificate is used.

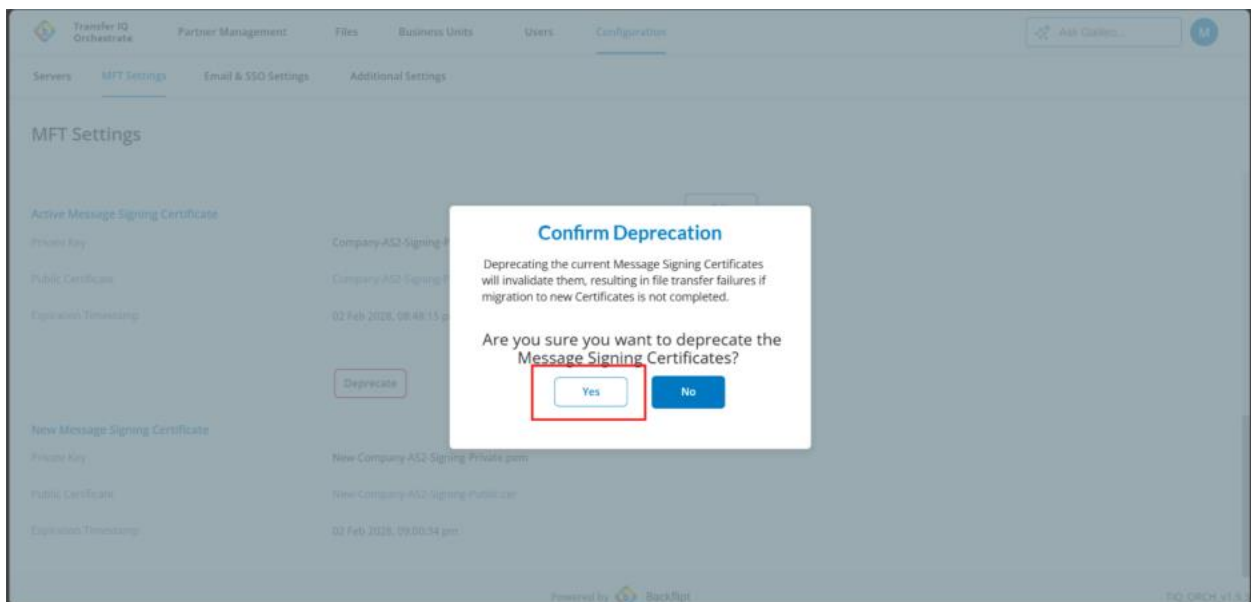
Deprecating Message Signing Certificates



1. Navigate to the **Active Message Signing Certificates** section in the MFT Settings tab.
2. Click the **Deprecate** button next to the old active **Message Signing Certificates**



3. A **popup** is displayed asking for confirmation to deprecate the selected certificate
4. Confirm the action by clicking the **Yes button** in the popup. The system marks the key as **deprecated**, indicating it is no longer active for encrypting or decrypting new files



5. The deprecated key is **removed completely** from the application



File Transfer Behavior During Deprecation

1. Only the **new certificate set** remains in the **MFT Settings** tab

The screenshot shows the 'MFT Settings' configuration page. At the top, there is a navigation bar with 'Transfer IQ Orchestrator' and various menu items like 'Partner Management', 'Workflows', 'Files', 'Business Units', 'Users', and 'Configuration'. Below this, there are tabs for 'Servers', 'MFT Settings', 'Email & SSO Settings', 'External Services', and 'Additional Settings'. The main content area is titled 'MFT Settings' and contains two sections. The first section, 'Public Certificate', shows 'encryption_certificate (2).pem' with an expiration timestamp of '04 Nov 2026, 03:59:27 pm' and a 'Rotate' button. The second section, 'Active Message Signing Certificate', shows 'signing_private_key.pem' with an 'Edit' button, 'signing_certificate (4).pem' as the public certificate, and an expiration timestamp of '04 Nov 2026, 03:59:18 pm' with a 'Rotate' button. The footer of the page includes 'Powered by Backflipt' and 'TIQ_ORCH_v1.9.5'.

2. The **Enterprise Local Profile** contains **only the new certificate pair**, and the deprecated certificate set is removed.
3. All outbound signing is now performed **using the new private key**.
4. If the partner uses the **public key that matches this new private key**, they will continue to **successfully verify** signature.

SFTP & AS2 Protocol

When both SFTP and AS2 protocol are deployed, clicking on MFT Settings in the Configuration tab will navigate to the MFT Settings section, where Certificates related to both SFTP and AS2 will be displayed. Certificates used for SFTP and AS2 are discussed above.



Email and SSO Settings

Click on Configuration > Email and SSO Settings to view and edit the email and SSO settings

Email and SSO Settings consists of three sub sections

1. Email Setup
2. Email Templates
3. SSO Settings

Email Setup

The **Email Setup** section is used to configure how the application sends emails.

Click the Edit button to edit the email setup

The screenshot displays the 'Email & SSO Configuration' interface. At the top, there is a navigation bar with 'Configuration' selected. Below it, the 'Email & SSO Settings' tab is active. The main content area is titled 'Email & SSO Configuration' and contains an 'Email Setup' section. An 'Edit' button is highlighted with a red box. The configuration details are as follows:

Protocol	SMTP
Email	mft_itadmin@backflipt.com
Username	mft_itadmin@backflipt.com
Password	*****
Email Server Address	smtp.office365.com
Port	587

The application supports SMTP (Simple Mail Transfer Protocol) for sending emails, which requires specifying the appropriate email server and credentials.



Transfer IQ Orchestrator | Partner Management | Workflows | Files | Business Units | Users | Configuration

Servers | MFT Settings | **Email & SSO Settings** | External Services | Additional Settings

Email & SSO Configuration

Email Setup Cancel Save

Protocol * SMTP

Email *

Username

Password

Email Server Address *

Port *

Test

This section contains the below fields

1. **Setup Type** - Specifies the method used to send emails. Transfer IQ Orchestrator application supports **SMTP**, which is a standard protocol for sending email messages between servers.
2. **Email** - The email address that will appear as the sender of system-generated emails.
3. **Username**- The username used to authenticate with the email server.
4. **Password**- The password associated with the email account or application-specific password. This is used to authenticate the application with the SMTP server.
5. **Outbound Email Server** - The address of the SMTP server through which emails will be sent. This is provided by the email service (e.g., Office 365.)
6. **Port** - The port number used to connect to the SMTP server. (Example: 587)

Transfer IQ Orchestrator | Partner Management | Workflows | Files | Business Units | Users | Configuration

Servers | MFT Settings | **Email & SSO Settings** | External Services | Additional Settings

Email & SSO Configuration

Email Setup Cancel Save

Protocol * SMTP

Email *

Username

Password

Email Server Address *

Port *

Test



Transfer IQ Orchestrator | Partner Management | Workflows | Files | Business Units | Users | Configuration

Servers | MFT Settings | **Email & SSO Settings** | External Services | Additional Settings

Email & SSO Configuration

Email Setup Cancel Save

Protocol * SMTP

Email *

Username

Password

Email Server Address *

Port *

Test

Once the Super Admin has entered all the SMTP details, Super Admin click the **"Test"** button to verify the connection. If the connection is successful, a confirmation message will be displayed indicating that the email server has been successfully connected.

Transfer IQ Orchestrator | Partner Management | Workflows | Files | Business Units | Users | Configuration

Servers | MFT Settings | **Email & SSO Settings** | External Services | Additional Settings

Email & SSO Configuration

Email Setup Cancel Save

Protocol * SMTP

Email *

Username

Password

Email Server Address *

Port *

✓Email server connection successful Test

After a successful test, click the **"Save"** button to save the details. Once saved, the details will appear in **view mode** within the **Email Setup** section



Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Servers MFT Settings **Email & SSO Settings** External Services Additional Settings

Email & SSO Configuration

Email Setup Edit

Protocol SMTP

Email mft_itadmin@backflipt.com

Username mft_itadmin@backflipt.com

Password *****

Email Server Address smtp.office365.com

Port 587

Email Templates Edit

Application Registration Email Template to application users

Subject Transfer IQ Orchestrator Application Registration

Powered by Backflipt TIQ_ORCH_v1.9.5

Email Templates

Upon the first login of the **First Super Admin**, a set of default **Email Templates** is automatically populated in the email templates section. These templates define the content and subject lines for various system-generated emails such as user invitations, password resets, and notifications etc.

Click the edit button to make changes to the existing templates

Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Servers MFT Settings **Email & SSO Settings** External Services Additional Settings

Email & SSO Configuration

Email Templates Edit

Application Registration Email Template to application users

Subject Transfer IQ Orchestrator Application Registration

Email Template 01.Application Registration Email Template to application users v1.1.html

Password Reset Email Template to application users

Subject Reset Password - Transfer IQ Orchestrator Application

Email Template 02.Password Reset Email Template to application users v1.1.html

New Onboarding Request from Business User to IT Admins

Subject New Onboarding Request Submitted - {{(mftEnvironment)}}

Email Template 03.New Onboarding Request from Business User to IT Admins v1.1.html

Onboarding Request Activity Notification from IT Admin to Business User

Subject IT Admin added a comment in onboarding request

Email Template 04.Onboarding Request Activity Notification from IT Admin to Business User v1.1.html

Powered by Backflipt TIQ_ORCH_v1.9.5

Each email template includes the following elements:



1. **Upload Button** - Allows the Super Admin to upload a custom email template file, replacing the default content if desired.

The screenshot shows the 'Email & SSO Configuration' page in the Transfer IQ Orchestrate interface. The page has a navigation bar with 'Configuration' selected. Below the navigation bar, there are tabs for 'Servers', 'MFT Settings', 'Email & SSO Settings', 'External Services', and 'Additional Settings'. The main content area is titled 'Email & SSO Configuration' and contains a list of email templates. Each template entry includes a 'Subject' field and an 'Email Template' field. The 'Upload Template' button is highlighted with a red box. The 'Delete' button is also visible next to each template entry. The page footer includes 'Powered by Backflpt' and 'TIQ_ORCH_v1.9.5'.

2. **Subject** - Displays the default subject line of the email, which can be edited.

The screenshot shows the 'Email & SSO Configuration' page in the Transfer IQ Orchestrate interface. The page has a navigation bar with 'Configuration' selected. Below the navigation bar, there are tabs for 'Servers', 'MFT Settings', 'Email & SSO Settings', 'External Services', and 'Additional Settings'. The main content area is titled 'Email & SSO Configuration' and contains a list of email templates. Each template entry includes a 'Subject' field and an 'Email Template' field. The 'Subject' field is highlighted with a red box. The 'Upload Template' button is also visible next to each template entry. The page footer includes 'Powered by Backflpt' and 'TIQ_ORCH_v1.9.5'.

3. **Delete Button** - Removes the previously uploaded template and helps to upload a new template.



The screenshot shows the 'Email & SSO Configuration' page. At the top, there are navigation tabs: Servers, MFT Settings, Email & SSO Settings (selected), External Services, and Additional Settings. Below the tabs, there are buttons for 'Cancel' and 'Save'. The main content area lists three email templates:

- Portal Registration Email Template to portal users**: Subject is 'Transfer IQ Orchestrate Application Registration'. The 'Email Template' field contains '01.Application Registration Email Template t...' and has a red 'Delete' button.
- Password Reset Email Template to portal users**: Subject is 'Reset Password - Transfer IQ Orchestrate Application'. The 'Email Template' field contains '02.Password Reset Email Template to applic...' and has a red 'Delete' button.
- New Onboarding Request from Business User to IT Admins**: Subject is 'New Onboarding Request Submitted - {{{mftEnvironment}}}'.

At the bottom of the page, it says 'Powered by Backflpt' and 'TIQ_ORCH_v1.9.5'.

The Email Templates section contains the following templates

- Application Registration Email Template to application users
- Password Reset Email Template to application users
- New Onboarding Request from Business User to Admins
- Onboarding Request Activity Notification from Business User to Admin
- Onboarding Request Activity Notification from Admin to Business User
- Account Creation notification to Business User
- Onboarding completed notification to Business User
- New Workflow Request Notification to Admins
- Workflow Request Activity Notification from Admin to Business User
- Workflow Request Activity Notification from Business User to Admin
- New Workflow Request Completion Template
- Account Creation notification to Distribution List
- Application Login Email Template to application users
- New Workflow Request Outcome on Success
- New Workflow Request Outcome on Failure
- Workflow Completion

After uploading all the templates, click the **"Save"** button to save the details. Once saved, the details will appear in **view mode** within the **Email Templates** section



Email & SSO Configuration

Workflow Completion

Subject: New Workflow Creation Successfull
Email Template: Workflow completed notification to Business User.html

AS2 Successful File Transfer

Subject: AS2 File Transfer Success Notification
Email Template: success_as2_2.html

AS2 File Transfer Failure

Subject: AS2 File Transfer Failure Notification
Email Template: failure_as2_2.html

Transfer IQ Orchestrate SSO Setup

Edit

Enable SSO



Transfer IQ Orchestrate SSO Setup

Single Sign-On (SSO) is a user authentication method that allows users to log in once and access multiple applications or systems without needing to log in again for each one.

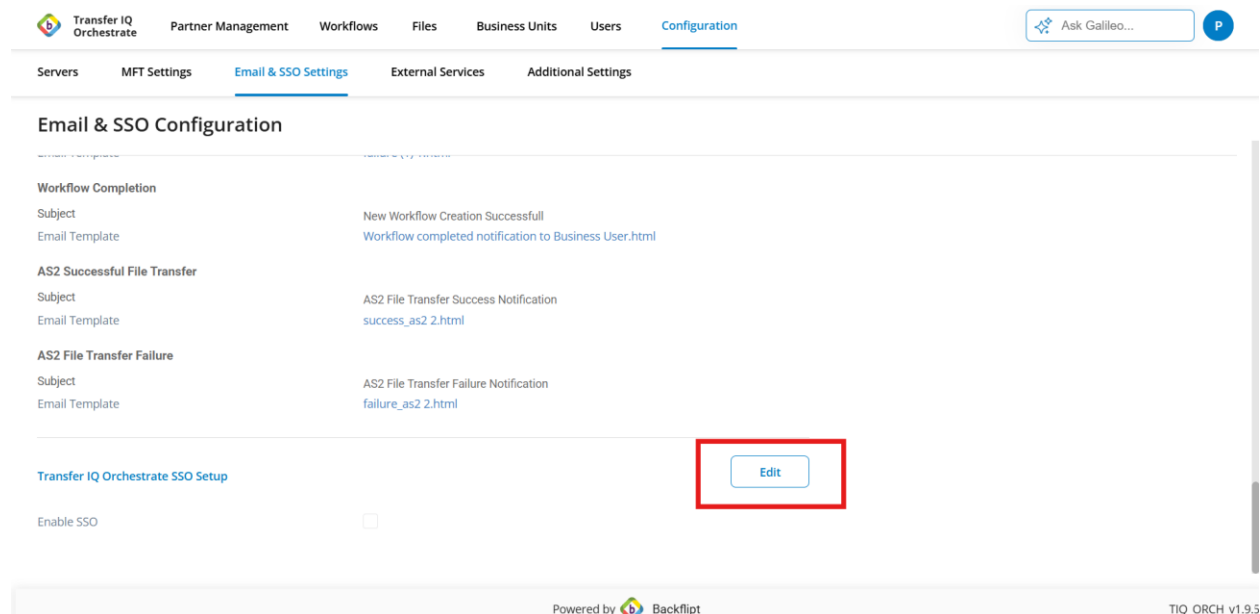
Instead of managing separate usernames and passwords for each application, users log in through a central **Identity Provider (IdP)** like **AWS IAM Identity Center**.

Super admin can enable and disable SSO by editing and simply checking and unchecking the checkbox

User Access Requirement with SSO :

- When **SSO is enabled**, the user must be created in **IAM Identity Center** and assigned to the application.
- The **Transfer Family (TransferIQ) application must be created in the same AWS region as the IAM Identity Center**.
- Only after these prerequisites are met, the **business user (B-User)** can log in through the **AWS Access Portal URL** and upload files.

Note: When **SSO is disabled**, **IAM Identity Center is not required**. Users can access the application without Identity Center configuration.



The screenshot displays the 'Email & SSO Configuration' page in the Transfer IQ Orchestrate interface. The page includes a navigation bar with options like 'Servers', 'MFT Settings', 'Email & SSO Settings', 'External Services', and 'Additional Settings'. The main content area is titled 'Email & SSO Configuration' and lists several email templates with their subjects and email templates. At the bottom, there is a section for 'Transfer IQ Orchestrate SSO Setup' with an 'Enable SSO' checkbox and an 'Edit' button. The 'Edit' button is highlighted with a red box.

Workflow Completion	Subject	Email Template
	New Workflow Creation Successfull	Workflow completed notification to Business User.html
AS2 Successful File Transfer	AS2 File Transfer Success Notification	success_as2 2.html
AS2 File Transfer Failure	AS2 File Transfer Failure Notification	failure_as2 2.html

Transfer IQ Orchestrate SSO Setup

Enable SSO

Edit



The SSO Section when enabled consists of the below fields

SSO Configuration Fields – Mandatory and Required Fields

- **IdP Service** - The Identity Provider used for SSO. (e.g., **IAM Identity Center**)
- **Entity ID** - This is the **Issuer URL** that uniquely identifies the IAM Identity Center.
- **Sign-in Page URL** - This is the AWS SAML Assertion Consumer Service (ACS) URL from IAM Identity Center, where users are redirected to log in when SSO is enabled
- **Whitelist URL** - Allowed redirect domains after successful SSO login. (Example: <https://d-9067cad15b.awsapps.com>)
- **IdP X.509 Certificate** - The Super Admin uploads the Base64-encoded X.509 certificate provided in the IAM Identity Center SAML metadata file, which is used to validate SAML responses from AWS

SSO Logout Configuration (Optional)

- **Single Logout URL** - This is the URL where users are redirected to log out from the Identity Provider when they sign out of the application. It helps ensure that the user is logged out from all connected applications in a single action.
- **Logout Public Certificate**- A public certificate used to verify the logout requests sent by the Identity Provider. This certificate can be uploaded to secure the logout process.
- **Logout Private Key** - A private key used by the application to sign logout requests sent to the Identity Provider. Uploading this key enhances security during the logout process.



Transfer IQ Orchestrator Partner Management Files Business Units Users Configuration

Servers MFT Settings **Email & SSO Settings** Additional Settings

Email & SSO Configuration

Transfer IQ Orchestrator SSO Setup Cancel Save

Enable SSO

IdP Service *

Entity ID (Identity Provider Issuer) *

Sign-in Page URL *

Whitelist URL *

The whitelist URLs must be separated by (,).

IdP X.509 Certificate * Upload

Single Logout URL

Logout Public Certificate Upload

Logout Private Key Unload

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After providing all the details, click the "Save" button to save the details.

Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Servers MFT Settings **Email & SSO Settings** External Services Additional Settings

Email & SSO Configuration

Transfer IQ Orchestrator SSO Setup Cancel Save

Enable SSO

IdP Service *

Entity ID (Identity Provider Issuer) *

Sign-in Page URL *

Whitelist URL *

The whitelist URLs must be separated by (,).

IdP X.509 Certificate * Upload AWS_SSO_for_Custom SAML 2.0 application_certificate (4).pem Delete

Single Logout URL

Powered by Backflpt TIQ_ORCH_v1.9.5

Once saved, the details will appear in view mode within the Transfer IQ Orchestrator SSO Setup section



The screenshot displays the 'Email & SSO Configuration' page in the Transfer IQ Orchestrator. The navigation bar at the top includes 'Servers', 'MFT Settings', 'Email & SSO Settings' (which is active), 'External Services', and 'Additional Settings'. The main content area is titled 'Email & SSO Configuration' and contains a table of settings for 'Transfer IQ Orchestrator SSO Setup'. An 'Edit' button is located in the top right corner of this section.

Setting	Value
Enable SSO	<input checked="" type="checkbox"/>
IdP Service	IAM Identity Center
Entity ID (Identity Provider Issuer)	https://identitycenter.amazonaws.com/ssoins-7223a69792407606
Sign-in Page URL	https://portal.sso.us-east-1.amazonaws.com/saml/assertion/MTkyODY4MTc4NzczX2lucy1hMGM2N2UzMjJkMDMxMzc5
Whitelist URL	https://d-9067cad15b.awsapps.com
IdP X.509 Certificate	AWS_SSO_for_Custom SAML 2.0 application_certificate (4).pem
Single Logout URL	
Logout Public Certificate	
Logout Private Key	

At the bottom of the page, it says 'Powered by Backflpt' and 'TIQ_ORCH_v1.9.5'.

External Services

External Services can be created and configured within the External Services Section of the Configuration tab of orchestrate application. Once an External Service is created, it can be associated with a custom workflow step. When a workflow that includes this custom step is triggered, the configured External Service is called.

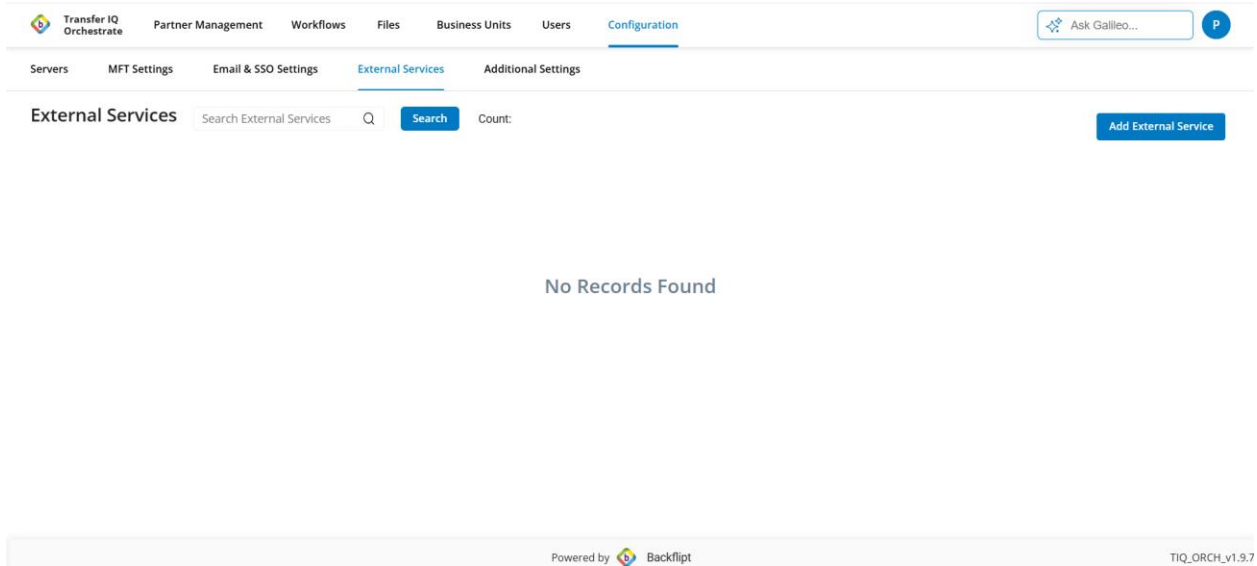
Orchestrator application supports the creation of multiple External Services, and each service can be reused across different workflows.

Creating an External Service:

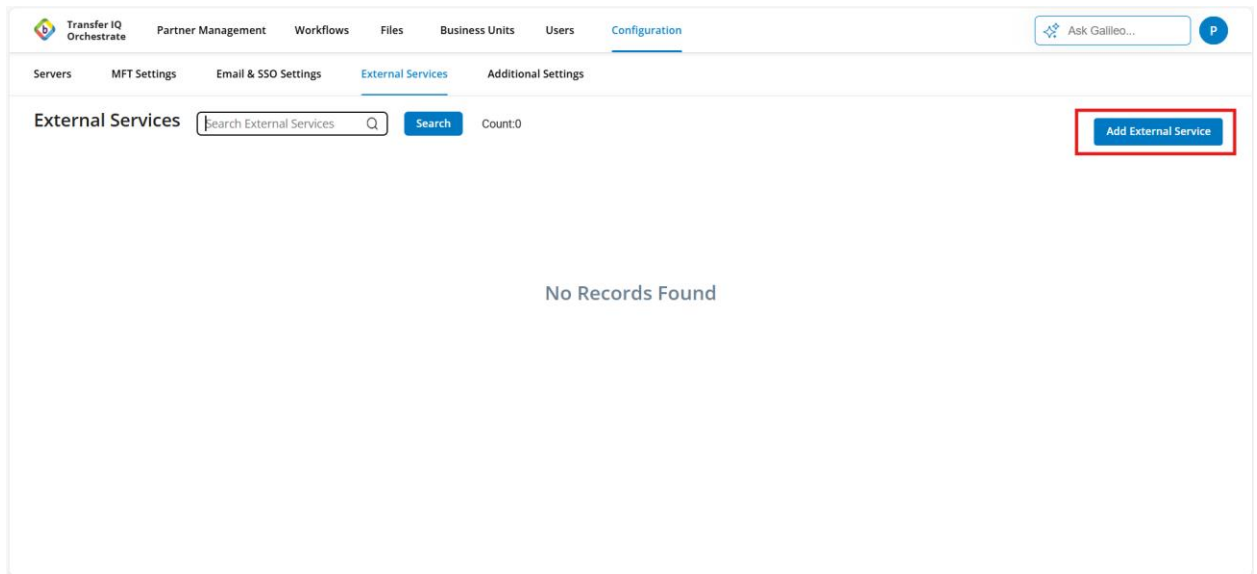
To create an external service:

1. Navigate to Configuration > External Services (if there are no external services created yet No Records Found Text will be displayed)





2. Click on Add External Service



3. Once the **Add External Service** button is clicked, the **Add External Service** form is displayed with the following fields and buttons:



The screenshot shows the 'Add External Service' form in the Transfer IQ Orchestrator. The form is titled 'Add External Service' and has a 'Cancel' button and a 'Create' button at the top right. The form fields are:

- Service Name ***: A text input field.
- Service Description**: A text area.
- Server Endpoint ***: A text input field.
- Server Health Check Endpoint**: A text input field with a help icon.
- Test**: A button to test the endpoint.
- Retry on Failure**: A checkbox.
- Authentication Type ***: A dropdown menu with the text 'Select Authentication Type'.
- Request Headers**: A section with a '+ Add Header' button.

- a. **Service Name * (Mandatory)** - This field is used to enter a unique name for the external service. The service name is required and helps identify the external service when configuring and selecting it in workflow custom steps.
- b. **Service Description** - This optional field allows the user to provide a detailed description of the external service. It can be used to explain the purpose, functionality, or any important notes related to the service.
- c. **Server Endpoint * (Mandatory)** - This field specifies the primary endpoint (URL) of the external service. This endpoint is invoked when the workflow executes the custom step that uses this external service. A valid and reachable URL must be provided.
- d. **Server Health Check Endpoint (Optional)** - This field is used to configure a health check endpoint for the external service. The system can call this endpoint to verify whether the external service is up and running
- e. **Retry on Failure (Checkbox)** - Retry for a custom step execution is determined by the following two conditions:
 - i. **External service not reachable**
 1. If the external service is not reachable, the system automatically retries the custom step execution regardless of whether the **Retry on Failure** option is enabled or disabled.
 - ii. **Failure response from external service**
 1. If the external service returns a failure response, retry attempts are made **only if** the **Retry on Failure** option is enabled.
 2. When enabled, the system retries the execution up to **three times** at intervals of **5, 10, and 15 minutes**.



3. If the option is disabled, no retry attempts are performed.

The screenshot shows the 'Add External Service' form in the Transfer IQ Orchestrator. The form is titled 'Add External Service' and has a 'Cancel' button and a 'Create' button. The form fields are: Service Name (OpenAI), Service Description (The OpenAI service checks whether a specific account name appears in a file. Based on the number of times the word occurs, it sends a response to the callback URL. If the word appears at least once in the uploaded file, the response indicates success; if the occurrence count is zero, the response indicates failure.), Server Endpoint (https://zs37vchbygaknhnr67jyrtxq0ozhum.lambda-url.us-east-1.on.aws/process), and Server Health Check Endpoint (empty). A 'Test' button is located below the Server Health Check Endpoint field. The 'Retry on Failure' checkbox is checked.

f. **Authentication Type* (Mandatory Dropdown)** - This dropdown allows the user to select the authentication mechanism required to access the external service. Selecting an authentication type is mandatory. Based on the selected option, additional authentication-related fields may be displayed for configuration. Below are the three types of authentication types that are supported by the orchestrate application

The screenshot shows the 'Add External Service' form in the Transfer IQ Orchestrator, with the 'Authentication Type' dropdown menu open. The dropdown menu has the following options: API KEY, BASIC, and NONE. The 'Retry on Failure' checkbox is checked. The 'Test' button is visible.

- i. **None** - This option indicates that no authentication is required to access the external service. When selected, the request is sent without any authentication credentials.
- ii. **Basic** - This option enables Basic Authentication, where a username and password are required. When **Basic** is selected, additional fields are displayed to capture the username and password.



- iii. **API Key** - This option enables authentication using an API key. When API Key is selected, additional fields are displayed to enter the API key details, such as the header key and value.

4. Request Headers

- a. This section allows users to define custom HTTP request headers that will be included when invoking the external service.
- b. Click the add header button

The screenshot shows the 'Add External Service' configuration page. The 'Service Name' is 'OpenAI'. The 'Service Description' is: 'The OpenAI service checks whether a specific account name appears in a file. Based on the number of times the word occurs, it sends a response to the callback URL. If the word appears at least once in the uploaded file, the response indicates success; if the occurrence count is zero, the response indicates failure.' The 'Server Endpoint' is 'https://zs37vchbygaknhr67jyrtxq0ozhum.lambda-url.us-east-1.on.aws/process'. The 'Authentication Type' is 'NONE'. The 'Request Headers' section has a red box around the '+ Add Header' button.

- c. Clicking the **Add Header** button displays two input fields—**Key** and **Value**—along with a **Remove** button. This enables administrators to add one or more key–value header pairs and remove any existing headers as needed
- d. Request headers are commonly used to pass authorization tokens, Content type information, or other required metadata to the external service.
- e. Multiple Headers can be added by clicking the ass header button multiple times



Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Servers MFT Settings Email & SSO Settings External Services Additional Settings

← Add External Service Cancel Create

Service Description
The OpenAI service checks whether a specific account name appears in a file. Based on the number of times the word occurs, it sends a response to the callback URL. If the word appears at least once in the uploaded file, the response indicates success; if the occurrence count is zero, the response indicates failure.

Server Endpoint *
https://zs37vchbygakhnr67jyrtrtqx0ozhum.lambda-url.us-east-1.on.aws/process

Server Health Check Endpoint ⓘ

Test

Retry on Failure

Authentication Type *
NONE

Request Headers

Key	Value	
Content-Type	application/json	X Remove

+ Add Header

f. Clicking the remove button will remove the added header

Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Servers MFT Settings Email & SSO Settings External Services Additional Settings

← Add External Service Cancel Create

Service Description
The OpenAI service checks whether a specific account name appears in a file. Based on the number of times the word occurs, it sends a response to the callback URL. If the word appears at least once in the uploaded file, the response indicates success; if the occurrence count is zero, the response indicates failure.

Server Endpoint *
https://zs37vchbygakhnr67jyrtrtqx0ozhum.lambda-url.us-east-1.on.aws/process

Server Health Check Endpoint ⓘ

Test

Retry on Failure

Authentication Type *
NONE

Request Headers

Key	Value	
Content-Type	application/json	X Remove

+ Add Header



The screenshot shows the 'Add External Service' configuration page. At the top, there are navigation tabs: Servers, MFT Settings, Email & SSO Settings, External Services (selected), and Additional Settings. The page title is 'Add External Service' with 'Cancel' and 'Create' buttons. The form includes:

- Service Name:** OpenAI
- Service Description:** The OpenAI service checks whether a specific account name appears in a file. Based on the number of times the word occurs, it sends a response to the callback URL. If the word appears at least once in the uploaded file, the response indicates success; if the occurrence count is zero, the response indicates failure.
- Server Endpoint:** https://zs37vchbygakhnr67jyrtxq0ozhum.lambda-url.us-east-1.on.aws/process
- Server Health Check Endpoint:** (Empty field)
- Test:** A button to validate the service connectivity.
- Retry on Failure:**
- Authentication Type:** NONE
- Request Headers:** + Add Header

5. **Test External Service** - The **Test** button is used to validate the connectivity and availability of the configured external service before saving the configuration. When clicked, the system sends a request to the **Server Health Check Endpoint** (or the primary server endpoint if a health check endpoint is not configured) to verify that the external service is reachable and responding as expected. This functionality helps ensure that the provided endpoint details are correct and that the external service is operational.
 - a. Based on the outcome of the test, the system displays appropriate messages to inform the user of the result:
 - b. If the endpoint is reachable and responds successfully, a success message is displayed indicating that the connection to the external service was successful. If the endpoint is unreachable, returns an error response, or does not respond within the expected time, a failure message is displayed.



Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Servers MFT Settings Email & SSO Settings External Services Additional Settings

← Add External Service Cancel Create

Service Name * OpenAI

Service Description
The OpenAI service checks whether a specific account name appears in a file. Based on the number of times the word occurs, it sends a response to the callback URL. If the word appears at least once in the uploaded file, the response indicates success; if the occurrence count is zero, the response indicates failure.

Server Endpoint * https://zs37vchbygakhnr67jyrtxq0ozhum.lambda-url.us-east-1.on.aws/process

Server Health Check Endpoint ○

Connectivity check successful. Server is reachable. Test

Retry on Failure

Authentication Type * NONE

Request Headers + Add Header

6. Once entering all the required data, click the Create button to create an External Service

Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Servers MFT Settings Email & SSO Settings External Services Additional Settings

← Add External Service Cancel Create

Service Name * OpenAI

Service Description
The OpenAI External service checks whether the word Account name exists in the file or not. Based on the occurrence of the word, it sends a response to the callback URL. If the word does not appear (i.e., the occurrence count is zero), the response will indicate a failure.

Server Endpoint * https://zs37vchbygakhnr67jyrtxq0ozhum.lambda-url.us-east-1.on.aws/process

Server Health Check Endpoint ○

Test

Retry on Failure

Authentication Type * NONE

Request Headers + Add Header

7. Once Created the created service will be displayed in External Services Table View



The screenshot shows the 'External Services' configuration page. At the top, there are navigation tabs: Servers, MFT Settings, Email & SSO Settings, External Services (selected), and Additional Settings. Below the tabs, there is a search bar for 'External Services' with a 'Search' button and a 'Count:1' indicator. An 'Add External Service' button is located on the right. The main content is a table with the following data:

External Service Name	External Service ID ↓	External Service URL	Retry on Failure	Authentication Type	Actions
OpenAI	00001	https://qa-mock-server.xeninc.us/p...	No	NONE	

Update External Service:

Once an external service is created, its configuration can be updated. All details entered during creation can be edited and saved. There are two ways to update an external service:

1. Click the **Edit** icon next to the external service in the view table.
2. By navigating to the external service's detail view and clicking the **Edit** button.

Option 1: Edit from the View Table



1. Navigate to **Configuration > External Services**.
2. Search for the required external service.
3. Click the **Edit** icon next to the external service in the view table.



Transfer IQ Orchestrator | Partner Management | Workflows | Files | Business Units | Users | Configuration

Servers | MFT Settings | Email & SSO Settings | External Services | Additional Settings

External Services | Search External Services | Search | Count:1 | Add External Service

External Service Name	External Service ID ↓	External Service URL	Retry on Failure	Authentication Type	Actions
OpenAI	00001	https://qa-mock-server.xeninc.us/p...	No	NONE	 

4. Modify the required fields.
5. Click **Update** to save the changes.

Transfer IQ Orchestrator | Partner Management | Workflows | Files | Business Units | Users | Configuration

Servers | MFT Settings | Email & SSO Settings | External Services | Additional Settings

← 00024 | Cancel | Update

Service Name * | OpenAI

Service ID | 00024

Service Description | The OpenAI service checks whether a specific account name appears in a file. Based on the number of times the word occurs, it sends a response to the callback URL. If the word appears at least once in the uploaded file, the response indicates success; if the occurrence count is zero, the response indicates failure.

Server Endpoint * | https://zs37vchbygakhnr67jjrttxq0ozhum.lambda-url.us-east-1.on.aws/process

Server Health Check Endpoint | | Test

Retry on Failure |

Authentication Type * | NONE

Request Headers | Add Member

Option 2: Edit from the External Service Details View Mode

1. Navigate to **Configuration > External Services**.
2. Search for the required external service.
3. Click the external service name (displayed in blue), which opens the service details in view mode.



Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Servers MFT Settings Email & SSO Settings External Services Additional Settings

External Services Search External Services Search Count:1 Add External Service

External Service Name	External Service ID ↓	External Service URL	Retry on Failure	Authentication Type	Actions
OpenAI	00001	https://qa-mock-server.xeninc.us/p...	No	NONE	

4. Click the **Edit** button in the form header.

Transfer IQ Orchestrator Partner Management Workflows Files Business Units Users Configuration

Servers MFT Settings Email & SSO Settings External Services Additional Settings

← 00024 Edit

Service Name OpenAI

Service ID 00024

Service Description The OpenAI service checks whether a specific account name appears in a file. Based on the number of times the word occurs, it sends a response to the callback URL. If the word appears at least once in the uploaded file, the response indicates success; if the occurrence count is zero, the response indicates failure.

Server Endpoint https://zs37vchbygakhnr67jyrtxq0ozhum.lambda-url.us-east-1.on.aws/process

Server Health Check Endpoint —

Test

Retry on Failure Enabled

Authentication Type NONE

Request Headers —

5. Update the required fields.

6. Click **Update** to save the changes.



The screenshot shows the configuration page for an external service. The service name is 'OpenAI' and the ID is '00024'. The description states: 'The OpenAI service checks whether a specific account name appears in a file. Based on the number of times the word occurs, it sends a response to the callback URL. If the word appears at least once in the uploaded file, the response indicates success; if the occurrence count is zero, the response indicates failure.' The server endpoint is 'https://zs37vchbygakhnr67jyrttxq0ozhum.lambda-url.us-east-1.on.aws/process'. The 'Retry on Failure' checkbox is checked, and the authentication type is 'NONE'. A 'Test' button is visible next to the 'Server Health Check Endpoint' field. The 'Update' button is highlighted with a red box.



Note: The connection to an external service can be tested from the **Edit** screen, both in **view mode** and **edit mode**.

Delete External Service

To delete an external service, follow the below steps

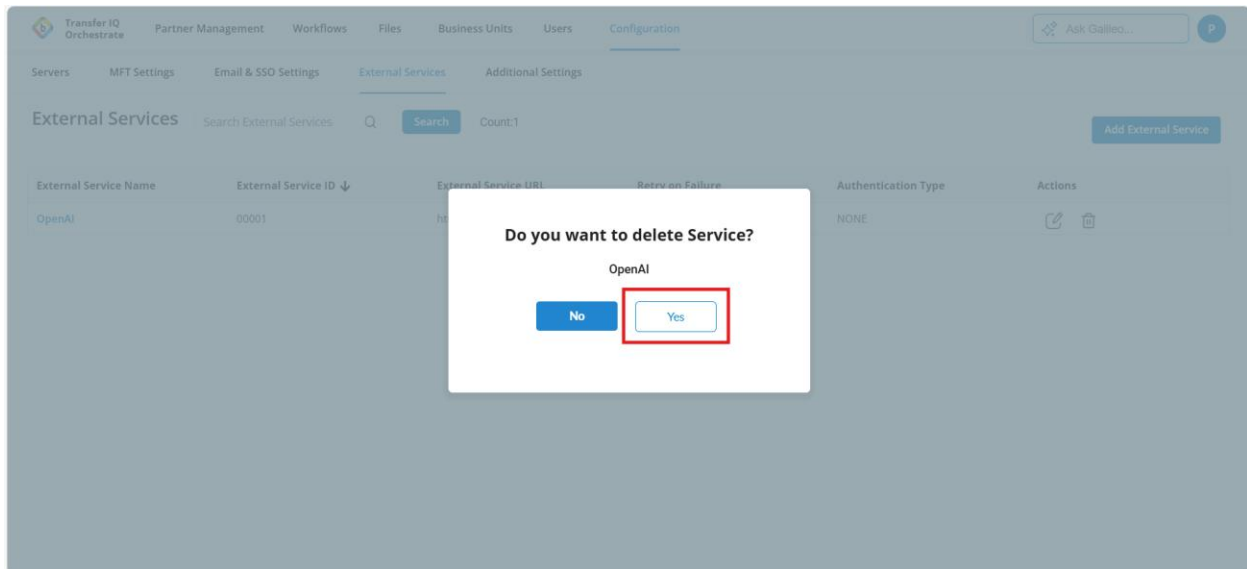
1. Click the Delete Button

The screenshot shows the 'External Services' list. It includes a search bar, a 'Search' button, and a 'Count:1' indicator. An 'Add External Service' button is in the top right. The table below lists the service details:

External Service Name	External Service ID ↓	External Service URL	Retry on Failure	Authentication Type	Actions
OpenAI	00001	https://qa-mock-server.xeninc.us/p...	No	NONE	 

2. A confirmation popup will be displayed before the service is deleted.
3. Clicking the Yes button in the popup will remove the external service, while No will keep it unchanged.





Support

Backflipt Standard Support Model

- Backflipt's Standard Support model includes Phone and Email support.
- Email – Support@backflipt.com
- Phone – 408-890-2032
- Between 7 am PST to 5 pm PST

