GENERAL

compilot user guide

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Introduction

In today's fast moving digital landscape, efficiency and precision are more critical than ever. Whether you're a developer, data analyst, or project manager, the right tools can transform repetitive tasks into streamlined workflows. **Compilot** is a cutting edge platform designed to automate complex processes, integrate data across systems, and provide real time insights—all from a single, intuitive interface. This comprehensive**Compilot user guide**walks you through everything from installation to advanced customization, ensuring you can harness the full power of the platform.

What Is Compilot?

Overview

Compilot is an AI powered orchestration engine that connects applications, services, and data sources. Think of it as a digital conductor, coordinating tasks across cloud services, databases, and on premise systems. Its core promise is to reduce manual intervention, eliminate bottlenecks, and provide a unified view of your operations.

Key Features

- Drag and Drop Workflow Builder – Create complex automations without writing a single line of code.
- Built In AI Assistant – Get real time suggestions, error detection, and predictive analytics.
- Multi Platform Integration – Connect to over 200 services, including Salesforce, Slack, AWS, Azure, and custom REST APIs.
- Role Based Access Control – Secure your workflows with granular permissions.
- Real Time Monitoring & Logging – Track execution status, performance metrics, and audit trails.

Getting Started

System Requirements

Before installing Compilot, verify that your environment meets the following specifications:

- Operating System: Windows 10/11, macOS 10.15 or later, Linux (Ubuntu 18.04+)
- Processor: Dual core 2.0 /GHz or higher
- Memory: 8 /GB RAM minimum; 16 /GB recommended for large workflows
- Storage: 200 /MB free space for the installer; additional space for logs and data caching
- Internet Connection: Required for initial activation and ongoing updates

Installation Steps

1. Navigate to the official download page and select your operating system.
2. Run the installer and follow the on screen prompts. Accept the license agreement and choose the installation directory.
3. When prompted, enable the "Add to PATH" option to allow command line access.
4. After installation completes, launch the application from the Start menu or terminal.

First Time Setup

Upon first launch, Compilot will guide you through a quick onboarding wizard:

- Account Creation – Enter your email and choose a secure password. A verification link will be sent to your inbox.
- Workspace Selection – Create a new workspace or import an existing one. Workspaces act as isolated environments for projects.
- API Key Generation – For secure integration with external services, generate an API key and store it safely.
- Initial Dashboard – Familiarize yourself with the main navigation panel, recent activities, and quick start templates.

Navigating the Dashboard

Interface Overview

The Compilot dashboard is divided into three primary sections:

1. Navigation Sidebar – Quick access to Workspaces, Workflows, Integrations, and Settings.
2. Central Workspace – Displays the selected workflow or data view.
3. Action Bar – Contextual actions such as Save, Run, or Share appear here.

Customizing Settings

Personalize your experience by adjusting settings under the “Preferences” tab:

- Theme – Choose Light, Dark, or Auto (system dependent).
- Notification Preferences – Configure email, SMS, or in app alerts for workflow failures or completions.
- Data Retention – Set how long logs and historical data are kept.
- Language – Switch between supported languages such as English, Spanish, and Mandarin.

Core Functionalities

Task Automation

Compilot’s drag and drop builder allows you to chain actions seamlessly. For example, you can:

- Pull new records from a Salesforce account.
- Transform data using built in functions or custom scripts.
- Push the processed data to a Google Sheet.
- Send a Slack notification once the workflow completes.

Data Integration

With over 200 connectors, you can integrate data from virtually any source:

1. Cloud Services – AWS S3, Azure Blob Storage, Google Cloud Storage.
2. Databases – MySQL, PostgreSQL, MongoDB, SQL Server.
3. APIs – REST, GraphQL, SOAP, and custom endpoints.
4. File Systems – FTP, SFTP, local directories.

Collaboration Tools

Compilot supports team collaboration through:

- Shared Workflows – Invite teammates to view or edit a workflow.
- Version Control – Track changes, revert to previous states, and comment on modifications.
- Audit Logs – Maintain a transparent record of who did what and when.
- Task Assignments – Allocate specific workflow segments to individual users.

Advanced Tips

Keyboard Shortcuts

Boost your productivity with these shortcuts:

- Ctrl + S – Save the current workflow.
- Ctrl + R – Run the workflow immediately.
- Ctrl + Z – Undo the last action.
- Ctrl + Shift + L – Open the logs panel.

Scripting and Plugins

For custom logic, Compilot allows you to embed JavaScript or Python scripts directly into workflow nodes. Additionally, the **Plugin Marketplace** offers pre built extensions that can:

- Integrate with niche tools like Jira, Trello, or Zendesk.
- Provide advanced data transformation functions.
- Enable machine learning inference calls.

Troubleshooting Common Issues

Encountering errors is inevitable when working with complex systems. Below are some frequent problems and their solutions:

1. Workflow Fails to Execute

   Check the logs for error messages.
2. Verify API credentials and network connectivity.
3. Ensure that all required fields in the workflow are populated.

- Confirm that source and destination schemas align.
- Use the “Data Preview” feature before running the workflow.
- Enable “Transaction Rollback” to revert partial changes.

- Refresh OAuth tokens or re enter credentials.
- Check that the API key has the necessary scopes.
- Consult the integration’s documentation for any specific requirements.

- Distribute heavy tasks across multiple worker nodes.
- Use caching for frequently accessed data.
- Monitor resource usage via the “Performance” tab.

Best Practices

Adopting proven strategies can dramatically improve your workflow reliability and maintainability:

- Modular Design – Build reusable sub workflows that can be shared across projects.
- Documentation – Add descriptive comments and documentation strings to each node.
- Versioning – Tag significant releases and maintain a changelog.
- Security Hygiene – Rotate API keys regularly and enforce least privilege access.
- Testing – Use the “Simulate” mode to validate logic before live deployment.

Frequently Asked Questions

What platforms does Compilot support?

Compilot runs natively on Windows, macOS, and Linux. It also offers a lightweight web interface for remote access.

Can I run Compilot on a server for unattended jobs?

Yes. Deploy Compilot in headless mode on your CI/CD pipeline or cloud instance to schedule nightly data syncs.

How do I integrate a custom API?

Use the **Custom Connector**wizard: specify the endpoint, authentication method, and data format. Test the connection before embedding it into a workflow.

Is there a limit to the number of concurrent workflows?

Limits depend on your subscription tier. Free tiers allow up to 5 concurrent runs, while enterprise plans support unlimited concurrency.

Can I export my workflows?

Yes. Workflows can be

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