

# WORKFLOW AUTOMATION PLATFORM (OverlayMVP)

## WHAT IT IS

- AI-powered Chrome extension + web dashboard to record and guide interactive web workflows (e.g., onboarding and SOP walkthroughs).

## WHO IT'S FOR

- Department managers at SMBs (10-500 employees) who need to capture "how we do this" processes and help teammates follow them consistently.

## KEY FEATURES

- Chrome extension records user actions and captures screenshots
- Guided walkthrough overlay on live websites
- AI-generated step labels/instructions (Celery background task)
- Auto-healing support when UI elements change
- Dashboard to sign up/login and review workflows + step details
- Company/team features: invites, roles, and permission checks
- Notifications + health endpoints for workflow status/visibility

## HOW IT WORKS (ARCHITECTURE + DATA FLOW)

### Components (repo evidence):

- Extension (Manifest V3): popup UI, background service worker, content scripts
- Backend API: FastAPI routers for auth, workflows, steps, screenshots, healing, company, invites, notifications, health, and users
- Database: SQLAlchemy with SQLite by default (DATABASE\_URL=sqlite:///app.db)
- Async jobs: Celery worker with Redis broker (AI labeling)
- Storage: screenshots in S3 if configured; otherwise local backend/screenshots
- Dashboard: React + Vite web app (proxies /api to backend in dev)

### Flow:

- 1) Record in extension -> upload steps/screenshots -> backend stores records
- 2) Extension triggers workflow processing -> Celery labels steps via AI service
- 3) Dashboard reads workflows/steps via REST API; extension runs walkthrough UI

## HOW TO RUN (MINIMAL GETTING STARTED)

- 1) Install JS deps: `npm install`
- 2) Backend venv + deps: `cd backend && python -m venv venv && \source venv/bin/activate && pip install -r requirements.txt`
- 3) Configure env: `cp backend/.env.example backend/.env` (set JWT\_SECRET\_KEY, DATABASE\_URL, REDIS\_URL, ANTHROPIC\_API\_KEY as needed)
- 4) DB migrations: `cd backend && alembic upgrade head`
- 5) Start services (3 tabs):
  - Backend API: `cd backend && source venv/bin/activate && \uvicorn app.main:app --reload --port 8000`
  - Dashboard: `cd dashboard && npm run dev (http://localhost:3000)`
  - Celery worker: `cd backend && source venv/bin/activate && \celery -A app.celery_app worker --loglevel=info`
- 6) Load extension: `cd extension && npm run build; then load extension/distro/ in Chrome at chrome://extensions (Developer mode).`