



Workflow

Workflow in Slate automates tasks and moves information forward based on rules you define.

It ensures the right actions happen at the right time, so your processes run consistently and efficiently.



DIFFICULTY
Beginner



ESTIMATED TIME
8 minutes



CATEGORY
Automation & Process



1. Why this matters

Workflow saves time and reduces manual work by automating repetitive tasks.

It improves accuracy, ensures follow-up, and keeps information moving through your process.



2. Think of it like...

Workflow is like a row of dominoes. The first domino (trigger) tips over, and each one after it falls in order, automatically, until the process is complete.



3. The Big Picture



A trigger starts the workflow. Each step runs in order, creating a **waterfall process** until it's complete.



4. Common Misconceptions

- Workflow and Rules are the same. (Rules evaluate data; Workflow takes action.)
- Workflow is only for emails. (It can update records, create tasks, move records, and more.)
- Once built, it never needs review. (Processes change—workflows should be reviewed regularly.)
- It runs on a schedule. (Workflows run when a trigger occurs, then follow the defined steps in order.)



5. Key Takeaways

- ✓ Workflows run when a trigger occurs.
- ✓ After the trigger, steps run in order like a waterfall.
- ✓ They automate tasks, reduce errors, and improve the experience.
- ✓ Document your workflows so others understand them.
- ✓ Review and test workflows regularly to keep them effective.



Common Triggers

- ✓ Record created or updated
- ✓ Form submitted
- ✓ Decision made
- ✓ Checklist item completed
- ✓ Date or time
- ✓ Manual start
- ✓ And more!



Common Actions

- ✓ Send an email
- ✓ Create or update a record
- ✓ Update field values
- ✓ Add or remove checklist items
- ✓ Create a task
- ✓ Move a record
- ✓ Post to Slate Connect
- ✓ And more!



Examples of Workflows

Admissions

- Send application received email
- Create follow-up task
- Move to next step when a checklist item is complete

Enrollment

- Send deposit reminder
- Update records when forms are submitted

Student Success

- Send communications based on milestones
- Create alerts for at-risk students

Operations

- Update statuses on specific dates
- Notify staff of important changes



Next Concepts

- Rules
- Events
- Deliver
- Populations
- Queries