



Entities

Custom record types in Slate that let you track and manage the information that matters to your institution.

Entities extend Slate beyond the built-in record types so you can capture anything—your way.



DIFFICULTY

Beginner

ESTIMATED TIME

5 minutes

CATEGORY

Data Structure

1. Why this matters

Not everything fits into the standard record types. Entities let you track custom information—like mentors, scholarships, equipment, or internships—in a way that works for your school.



2. Think of it like...

Entities are like adding new folders to your filing system. You create the structure you need, then store and organize the records that belong there.



3. The Big Picture



Entities store and organize custom information and connect it across Slate.



Understanding Meter

See how this concept fits in your learning journey.



4. Common Misconceptions

- Entities are the same as custom fields.
- Entities are only for technical/advanced users.
- Entities can't be used in other parts of Slate.
- Once created, entities can't be changed.
- Entities are only for storing data, not for action.



5. Key Takeaways

- ✓ Entities let you create custom record types in Slate.
- ✓ They store the information you need, your way.
- ✓ Entities can be used across Slate in many places.
- ✓ They help organize data, drive processes, and support better decisions.
- ✓ Design with purpose and keep it simple.



Common Uses

- ✓ Track mentors or volunteers
- ✓ Manage scholarships or awards
- ✓ Store equipment or assets
- ✓ Track internships or placements
- ✓ Manage surveys or feedback
- ✓ Build custom portals & workflows
- ✓ And much more!



Next Concepts

- Forms
- Reports
- Rules
- Populations
- Deliver