



Populations

Dynamic groups of records in Slate built using rules and filters.

Populations help you organize, segment, and take action on the right people at the right time.



DIFFICULTY
Beginner



ESTIMATED TIME
5 minutes



CATEGORY
Organization



1. Why this matters

Populations keep your data organized and your communications targeted. They ensure the right people get the right message, the right task, or the right follow-up.



2. Think of it like...

A population is like a labeled filter. You define the criteria once, and Slate keeps the group up to date automatically as records change.



3. The Big Picture



Create once. Use everywhere. Always up to date.



4. Common Misconceptions

- Populations are static lists. (They update automatically.)
- Populations are the same as queries. (Queries are one-time results.)
- Populations store records. (They are dynamic groups, not stored lists.)
- Once created, they work everywhere without purpose. (They are meant to be used intentionally for communication, tasks, reports, etc.)
- Populations are only for communication. (They are used in many places across Slate.)



5. Key Takeaways

- ✓ Populations are dynamic groups built with filters and rules.
- ✓ They automatically update as data changes.
- ✓ Use populations to target communications, assign tasks, run reports, and more.
- ✓ They save time, reduce errors, and help you stay organized.
- ✓ Think: the right people, the right action, every time.



Understanding Meter

See how this concept fits in your learning journey.



Common Uses

- ✓ Targeted email communications
- ✓ Assign tasks to specific groups
- ✓ Create lists for events and campaigns
- ✓ Run focused reports and dashboards
- ✓ Add to or remove from stages
- ✓ Apply tags or statuses
- ✓ Trigger rules and workflows
- ✓ Include/exclude in forms and queries
- ✓ And much more!



Next Concepts

- Rules
- Forms
- Deliver
- Events
- Reports