



Rules

Automated logic in Slate that helps you take action based on conditions.

Rules keep your data accurate, your processes consistent, and your teams efficient.



DIFFICULTY
Beginner



ESTIMATED TIME
5 minutes



CATEGORY
Automation



1. Why this matters

Rules automate decisions and actions in Slate. They help enforce business logic, reduce manual work, and ensure the right things happen at the right time.

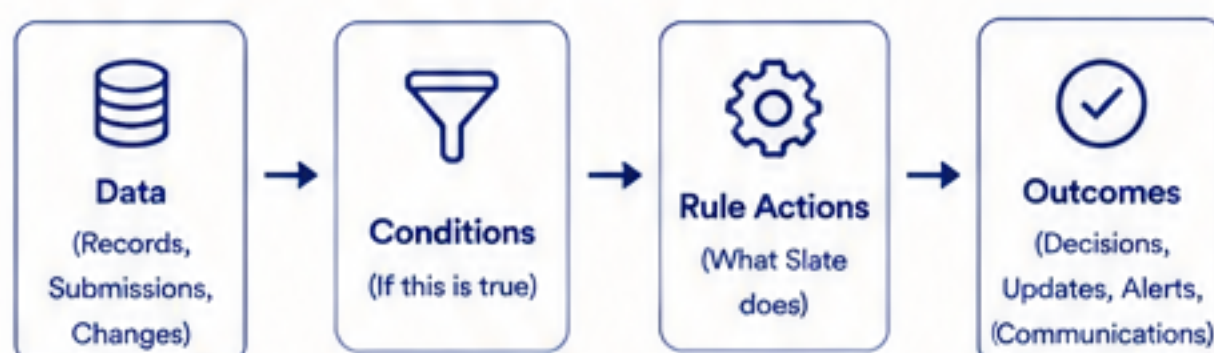


2. Think of it like...

A rule is like an if/then recipe. If certain conditions are met, then Slate takes action—automatically.



3. The Big Picture



Rules listen for events, check conditions, and take action.



4. Common Misconceptions

- Rules are only used for email.
- Rules are too complicated to build.
- One rule can only do one thing.
- Rules run all the time—this can cause issues.
- Once built, rules never need to be reviewed.



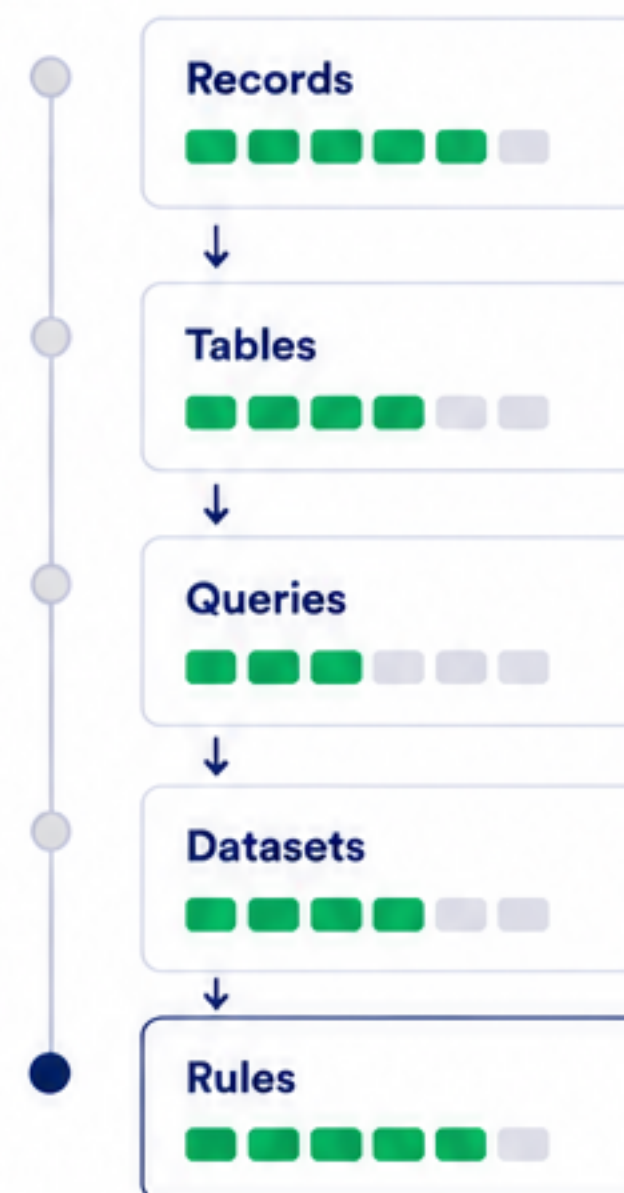
5. Key Takeaways

- ✓ Rules automate actions based on conditions and events.
- ✓ They improve data quality, save time, and enforce consistent processes.
- ✓ Rules can update records, send emails, create tasks, change decisions, and much more.
- ✓ Review and test rules regularly to ensure they are working as intended.
- ✓ Great rules = better data, better experiences.



Understanding Meter

See how this concept fits in your learning journey.



Common Uses

- ✓ Update fields automatically
- ✓ Send emails & notifications
- ✓ Create tasks or to-dos
- ✓ Change decisions
- ✓ Add or remove tags
- ✓ Control visibility & access
- ✓ Trigger integrations via Deliver
- ✓ And much more!



Next Concepts

- Queries
- Forms
- Populations
- Deliver