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CONSULTING

MINI GUIDE

LEAVE BETTER CLUES

2 Documentation Fixes
to Make in Slate Today

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Most documentation fails for a simple reason: it lives somewhere else. Maybe there's a Google Doc or a training deck, but when you're editing a query, updating a portal, or troubleshooting a process, that's typically not where you're looking. The answer isn't more documentation. It's documentation that shows up where the work happens inside Slate.

Here are two simple fixes you can make today. Each takes less than ten minutes, and each pays dividends every time you (or the person who inherits your work) opens what you built.

1 USE QUERY DESCRIPTION, NOT NOTES

Most Slate users default to Edit Notes when they want to explain what a query does. It's the obvious place to add documentation, but there's one problem: Notes are hidden. Someone has to know they exist and click into them to read them.

The Description field works differently. It appears as soon as someone opens the query, before they ever run it. No extra clicks required. The context is right there when you open the query.

3 Things a Good Description Tells You:

- What this query does
- When to use it
- Any do-not-touch warnings or ownership notes

2 USE INACTIVE LITERALS AS INLINE COMMENTS

Most query-building tools have comments. Slate doesn't. At least not officially. But there's a workaround that many users overlook.

Inactive exports and filters can function like code comments. They don't run, they don't affect your results, and they don't change your output. They simply sit alongside your logic and explain what's happening where it's happening.

2 Simple Ways to Use Inline Comments

Exports: Add an inactive Literal and put your note in the Name field.

Filters: Add an inactive Custom SQL filter and put your note in the Name field. Slate requires a valid filter to save, so use something harmless like "1=1".

Inline Comments are Especially Useful for:

- Complex logic that isn't immediately obvious
- Temporary workarounds you plan to revisit
- Edge cases that future you might otherwise forget

It's the closest thing Slate has to inline comments in the Query tool, and it can save future you from having to decode your own logic.

9 MORE FIXES AWAIT IN THE LEAVE BETTER CLUES FIELD GUIDE

These two tips are just the beginning. The full Leave Better Clues Field Guide includes more ways to build documentation directly into Slate, including:

- Form instruction blocks for internal notes
- Portal README views your successor can actually read
- Naming conventions that turn structure into documentation
- Backup views so you can roll back without Time Warp
- Export and import loop cross-references
- Inactive rows in translation code tables
- Rule notes surfaced in a shared view
- Prompt and export value relabeling
- Workflow notes that preserve institutional knowledge

GET THE FIELD GUIDE: postcaptain.com/guides-leave-better-clues



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