

Picklist Types (and When to Use Them)

Understanding picklists is key to data governance:

- Standard Picklists — Object-specific, simple, and easy to manage.
- Custom Picklists — Fully configurable for business processes.
- Global Value Sets — Reusable values across multiple fields (great for consistency).
- Dependent Picklists — Control values based on another field (improves data quality).
- Multi-Select Picklists — Use sparingly; reporting and automation can get complex.

 Pro tip: Use Global Value Sets + Dependencies for enterprise-scale orgs.

Service Cloud Essentials

Service Cloud isn't just case management — it's an ecosystem:

- Omni-Channel for intelligent work routing (capacity, skills, priority).
- In-App Messaging for real-time customer engagement inside mobile/web apps.
- Queues & Assignment Rules to automate triage.
- Knowledge + Entitlements for SLA-driven support.

When configured correctly, Omni-Channel becomes the backbone of agent productivity.

Experience Cloud Sites

Experience Cloud enables secure external collaboration:

- Partner portals
- Customer self-service
- Knowledge-driven support communities

Key considerations: sharing model, guest user security, and performance optimization.

Chatter Groups

Still one of the most underused collaboration tools:

- Public Groups — Open knowledge sharing
- Private Groups — Project or leadership discussions

Great for release coordination, incident swarming, and SME collaboration.

Exchange Rates in Multi-Currency Orgs

Two concepts that often get confused:

- Standard Exchange Rates — Single rate per currency
- Dated Exchange Rates — Historical accuracy for opportunities and forecasting

If you report across regions, dated rates are a must for financial integrity.

Lightning Pages That Drive Adoption

A well-designed UI = higher productivity:

- Lightning Record Pages — Role-based components
 - Home Pages — Task-focused dashboards
 - Dynamic Forms & Visibility Rules — Show the right data at the right time
- Design for the user's workflow, not just the data model.

 In-App Messaging Picklists

Standardizing values like Conversation Type, Issue Category, and Resolution improves reporting and enables better bot routing and analytics.