About SAM Picklists

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Each Sales Access Manager worksheet can have various picklists associated with it that standardize frequently used information and facilitate the CRM user's data entry. Picklist values appear in Suggested Item dialog boxes when a CRM user clicks the **Suggested Items** button next to a desired field.

When you are planning the Sales Access Manager integration, you need to decide how you want to implement the picklists. You have the following options:

- **Zero picklist values**—you do not maintain any picklist values and the CRM user enters the data for the applicable fields manually.
- **One set of picklist values**—you maintain one set of default picklist values for each Sales Access Manager worksheet.
- **Multiple sets of picklist values**—you can set up different picklists based on the Sales Access Manager worksheet type. For example, a CRM opportunity record might allow the CRM user to choose one of the following four different product types: Consulting Services, Manufacturing, Software, and Design. When the CRM user access the Blue Sheet applet for an Opportunity with a particular product type, the applet will display a set of picklist values specific to that type. See Setting Up Multiple Picklists.

If you set up one or more set of picklist values, the CRM user may still edit the values and enter free text as desired (with the exception of the Customer Criteria field)