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Sage Partner

INTRODUCING SAGE 100 2023

Sage 100 2023 is now available and includes over 40 enhancements and updates. Here's a look at what's new in the latest release.

Sage 100 Desktop Updates

A variety of enhancements are incorporated into the Sage 100 desktop in 2023 including:

Recent Tab: this new tab shows tasks that have been accessed recently so you have a quick way to get back to the tasks you used frequently and often.

Persistent Active Tab: the last tab you accessed on the ribbon now persists after exiting Sage 100 and will now be the active tab the next time you log in.

More Helpful Tooltips: enhanced tooltips now show where tasks are located so when hovering, you can easily see where the task is accessed from.

Masked Data for Better Security

The **1099 Vendor Taxpayer ID/Social Security Number** is now masked in data entry tasks and will also print masked on the Vendor Listing, Vendor Listing with Balances, and Vendor Mailing Labels. In addition, vendor **ACH bank account and routing numbers** are now masked in data entry tasks and will also print masked on the Vendor Listing. The routing transit numbers are also masked in ACH Maintenance. In both cases, only Sage 100 users with the appropriate security access can view this sensitive information and access the options to print unmasked data.

Inventory Management Enhancements

In the Inventory Management module, a new '**Display Quantities for Inactive Warehouses**' check box has been added that allows you to hide inactive warehouses. In addition, a new checkbox to '**Show/Hide Zero Quantities for Lot/Serial Items**' has been added, allowing to initially display lot/serial items with zero quantities on the Cost Detail tab in Item Maintenance and Item Inquiry. Both of these new options are available on the Additional tab in Inventory Management Options.

What's more, a range of new data fields, planning options, and inquiries are available in **Inventory Requirements Planning** that enhance the process and flexibility.

Select Serial Numbers by Range

Originating from the Sage 100 ideas website, a 'Select Serial Numbers by Range' button has been added in Lot/Serial Number Distribution. You can select serial numbers using a range instead of scrolling through a list to find the starting and ending serial numbers.

We've only scratched the surface of all the new features packed into Sage 100 2023. Refer to the What's New Guide for full details, or contact us with questions.

Summary of New Features in the Latest Release

Sage CRM 2023 Release 1 is now available. Let's take a look at what's new and noteworthy in the newest version.

Easier File Editing

You no longer need to install a plugin to view and edit a file attached to a Company or Task, or created using the Mail Merge feature.

With Sage CRM 2023, you now **download the file locally**, open and edit it in a relevant application, and then upload the file back to Sage CRM.

It's a much faster and easier way to edit file attachments compared to the process in earlier versions of the software.
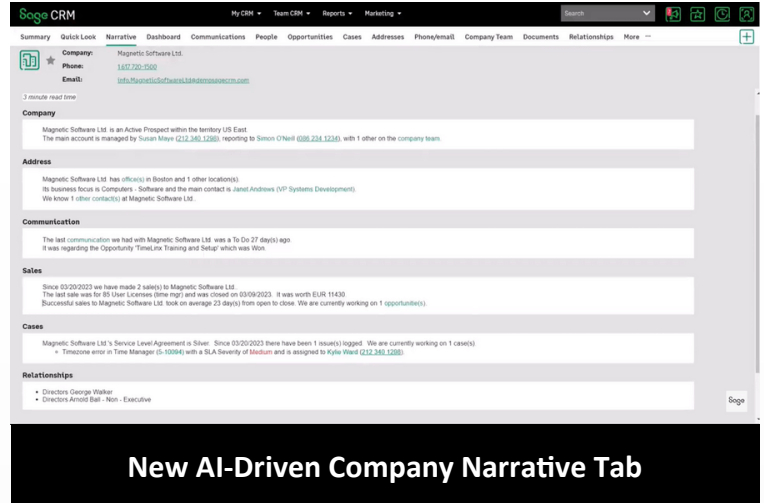
New Company Narrative Tab

Sage CRM 2023 R1 uses artificial intelligence to generate and display a narrative report containing an executive summary and business insights for each Company.

This new feature automatically analyzes the sales, customer service, and communication data and presents it as a short and easy-to-understand narrative report on a 'Narrative' tab displayed for each Company.

The narrative report takes into account the security policies existing in Sage CRM, so that the generated information is tailored to the user who is accessing the Narrative tab.

In short, this AI-driven narrative approach is much more informative and engaging than static data alone. It summarizes intelligence without having to look across records and converting raw data into useful information.

New AI-Driven Company Narrative Tab

Other Notable Enhancements

Import Email to Cases and Custom Entities

A previous Sage CRM release enabled the import of email messages to Companies, Persons, and Opportunities. In Sage CRM 2023, you can now also import emails into Cases and custom entities.

File Name Extension Control

System administrators can configure an allowlist to restrict the file types that users can upload to Sage CRM. If a file name extension is missing from the allowlist, the upload of the file is blocked.

Customize Sage CRM Login Screen

Admins can now position custom logos as well as change the background of the entire login screen, offering better control over the look & feel of an individual installation.

Be sure to contact us if you have questions about Sage CRM 2023 or need help with an upgrade to the latest version.

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