



### In This Issue

#### Page 1

New Keyboard Shortcuts in Sage 300 Web Screens

#### Page 2

What's New in Sage CRM 2023 Release 1

**Sage Partner**

## NEW NAVIGATION KEYBOARD SHORTCUTS IN SAGE 300 WEB SCREENS

A recent update for Sage 300 introduced a new set of keyboard shortcuts that allow you to open screens from the navigation menu without having to bounce back and forth to the mouse. Here's a look at these new commands available in Sage 300 Web Screens.

### New Keyboard Shortcuts for Navigation

The following keyboard shortcuts now allow you to move around the navigation menu and open Sage 300 web screens:

- **Tab** - Go to the next menu item.
- **Shift + Tab** - Go to the previous menu item.
- **Arrow Keys** - Move around in the menu. Right and left arrows move through the levels of the menu structure (into and out of submenus). Up and down arrows move through the items within a menu or submenu.
- **Enter or Space** - Open a submenu or screen.
- **Escape** - Close any open submenus and go to the main menu.
- **Home** - Go to the first item in the current menu.
- **End** - Go to the last item in the current menu.

### Other Common Keyboard Shortcuts for Data Entry

Although not new to Sage 300, these additional keyboard shortcuts may help you speed up **data entry** in Sage 300 web screens:

- **Enter** - Apply changes to the field you are editing.
- **Tab** - Go to the next field.
- **Pg Up** - Go to the top of the window in view.
- **Pg Dn** - Go to the bottom of the window in view.
- **Shift + Tab** - Go to the previous field.
- **Esc** - Close Finders, pop-up screens, and messages (note: this keyboard shortcut may not work for all screens and messages depending on the active screen or web browser being used).

[Refer to this guide](#) for the full range of keyboard shortcuts in Sage 300 web screens



[Contact us](#) with questions about this feature or for help upgrading to Sage 300 2023.

# WHAT'S NEW IN SAGE CRM 2023 R1

## 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.

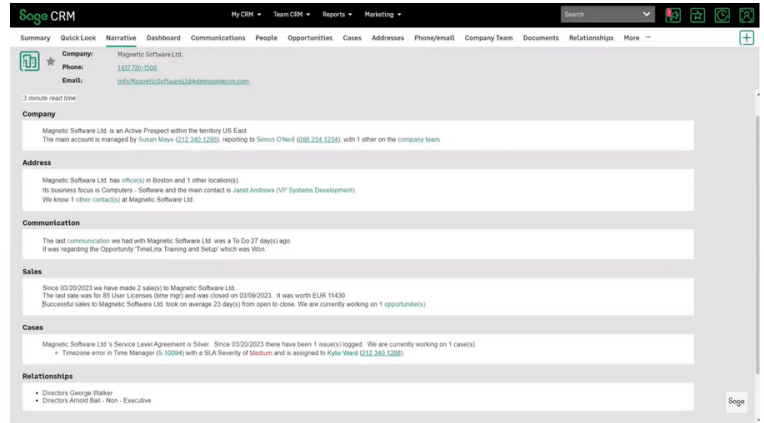
### New Company Narrative Tab

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.

**Pur-Logic Solutions Inc.**

Serving North America

sales@pur-logicsolutions.com • (800) 372-6174



www.Pur-LogicSolutions.com