

**Aptean Apprise**

# New Features Guide

Version 8.2.0

May 2020



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This document describes the new features and enhancements in Apprise® Version 8.2.0. For detailed information on using the features described in this document, refer to the *Apprise Help*.

## Apprise Web User Interface

Continuing to build upon the 8.1 web user interface, Apprise version 8.2 allows end users to access Apprise directly from a web browser. Over 1,400 Apprise screens have been converted to run in a browser. SaaS customers no longer need to have a site-to-site VPN established, which makes it easier than ever for remote workers to access Apprise.


The Apprise version 8.2 web user interface allows for documents to be printed directly to on-premise printers using Aptean's cloud printing technology. Cloud printing enables SaaS customers to print all documents (labels, pack lists, and scheduled reports) directly from Azure to physical printers without the need for user interaction or a site-to-site VPN connection.

## Avalara AvaTax Integration

Tax nexus laws are changing and becoming more complex to manage with direct-to-consumer shipments. Avalara AvaTax is a cloud-based solution that automates tax calculations and the tax filing process. Avalara provides real-time tax calculation using tax content from more than 12,000 US taxing jurisdictions and over 200 countries, ensuring tax is calculated correctly based on the most current tax rules. Click [here](#) for more information about Avalara AvaTax.

In Apprise Version 8.2.0, the system can be integrated with AvaTax to calculate US sales tax and Canada GST/HST automatically in real-time.

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 **Note:** In order to use the integration, a valid AvaTax subscription is required.

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Apprise calls the AvaTax API when creating:

- Sales or return orders, to get tax estimates
- Sales or return invoices, to calculate the final tax amount

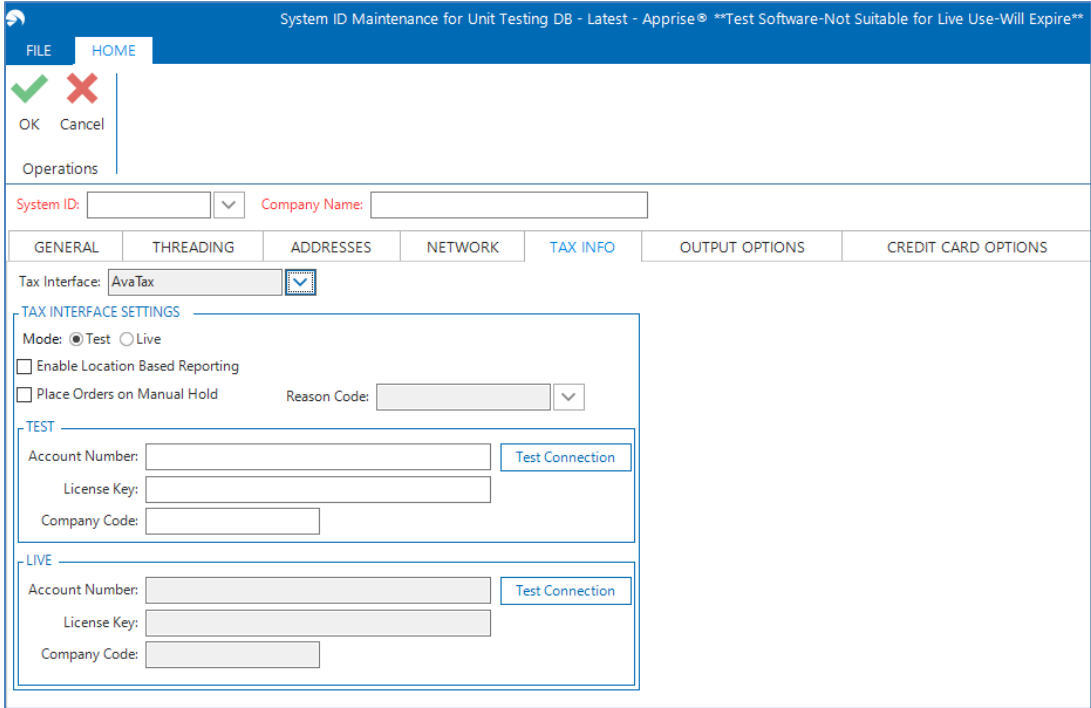
The invoices and tax amounts collected are stored in AvaTax and used for tax reporting.

The entire process requires very little setup and most importantly, you don't need to maintain any tax jurisdiction or tax rates in Apprise. For more information about setting up the AvaTax interface, refer to *AvaTax Interface FAQ* in the *Apprise Help* (F1 Help).

A few highlights of the Apprise/AvaTax integration are explained below.

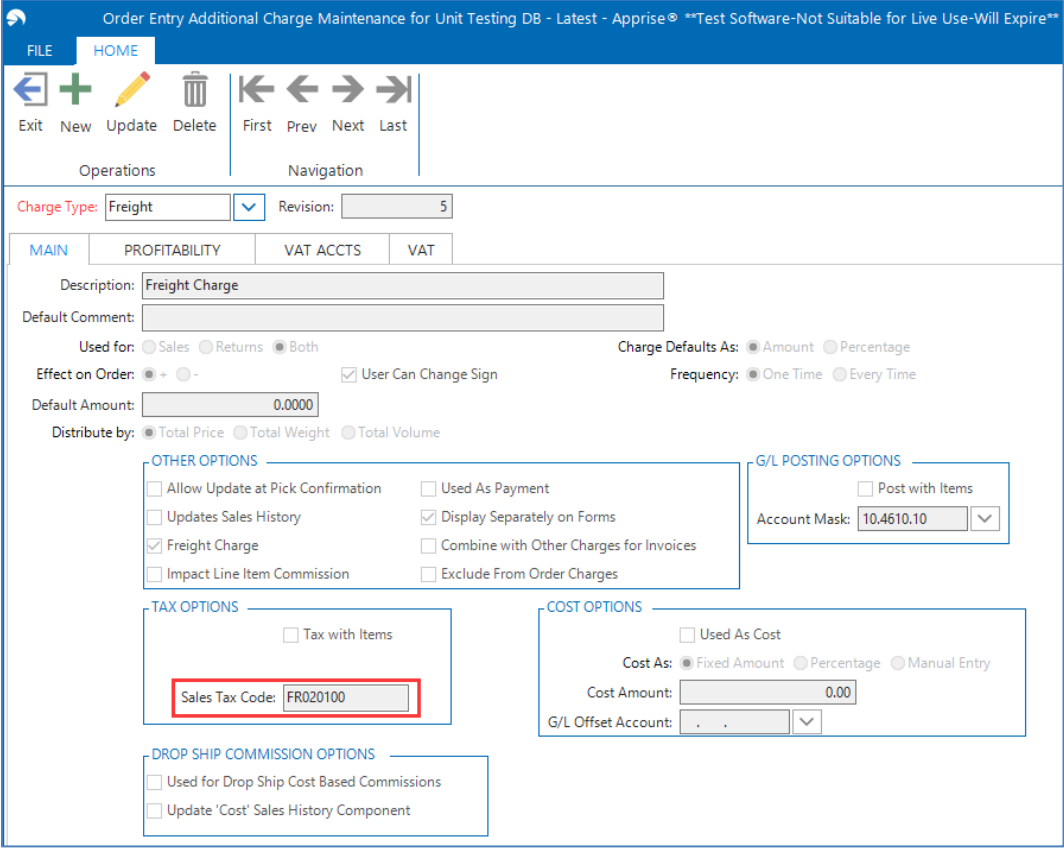
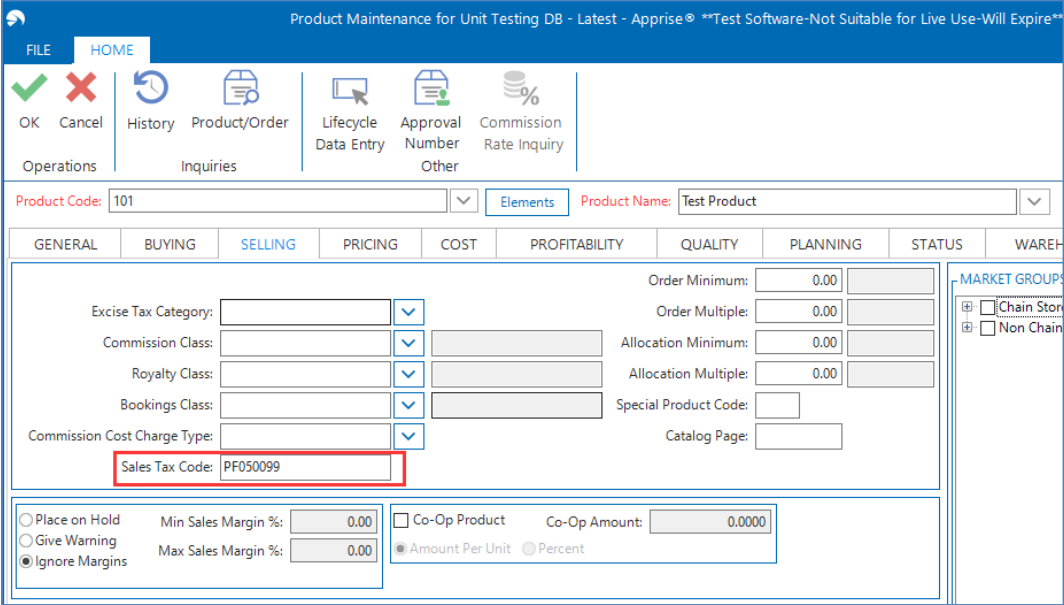
### Connect to AvaTax

Apprise allows for integration with AvaTax Test and Live environments. This allows you to work in the test mode until you are ready to go live using the Live mode.



# Assign AvaTax System Tax Code to Products or Additional Charges

You can use the newly introduced Sales Tax Code field in Product Maintenance and Order Entry Additional Charge Maintenance to assign an AvaTax System Tax Code to a product and an additional charge respectively.



## Mark a Customer Ship-To Address as Tax Exempt

Apprise allows you to set up a specific customer ship-to address as tax exempt. A sample window with the new check box and fields is as follows.

The screenshot shows the 'Customer Maintenance for Unit Testing DB - Latest - Apprise® \*\*Test Software-Not Suitable for Live Use-Will Expire\*\*' window. The 'SHIP-TO' tab is active, displaying various fields for a shipping address and tax options. The 'SHIPPING ADDRESS' section includes fields for Address 1, 2, and 3, City, State, Postal Code, Country, County, Fax, Telephone, Emerg. Phone, Email, Related Bill-To, Store ID, Attention, Shipping Location, Sales Location, Sales Rep 1, Sales Rep 2, Latitude, and Longitude. The 'SHIPPING OPTIONS' section includes Shipper ID, Fleet Delivery Shipper, Shipping Mode, Freight Collection, Shipping Account ID, and FOB. The 'TAX OPTIONS' section includes Tax Jurisdiction (set to None), Tax Exempt (checked), State Tax Exempt #, Entity Use Code, Country Tax Exempt #, Excise ID, Customer VAT ID, VAT Group Code, VAT Exempt, and VAT Exempt Reason Code. A red box highlights the 'Tax Exempt' checkbox and the 'Entity Use Code' field.

## Apprise Data Warehouse

In the prior releases, Apprise allowed the use of various BI solutions against the Apprise Data Warehouse, but this use was limited to order and invoice data.

In version 8.2.0, Apprise caters to your need for reporting and displaying more visualizations by expanding the data synchronized with the data warehouse. You can now access the following data to display more visualizations to analyze and address your departmental needs:

- Sales or return orders, to review open orders and information about them
- Sales or return invoices, to review sales trends and patterns
- Warehouse efficiency data
- OTIF compliance
- Chargebacks

This data is passed to PostgreSQL in near real-time. When transactions are entered in Apprise, the data is automatically synced to the data warehouse where it can be analyzed.

Using Power BI, Apprise provides predefined visualizations which are explained in the next section.



# Apprise Business Intelligence Powered by Microsoft® Power BI

In 8.2.0, Apteon provides a standalone add-on module for analytics and business intelligence. The Apprise Business Intelligence module utilizes the Apprise Data Warehouse and is powered by Microsoft Power BI. The module includes four industry focused Power BI reports and more reports will be added throughout the version 8.2 lifecycle. The Power BI reports are predefined, but can be configured as needed.

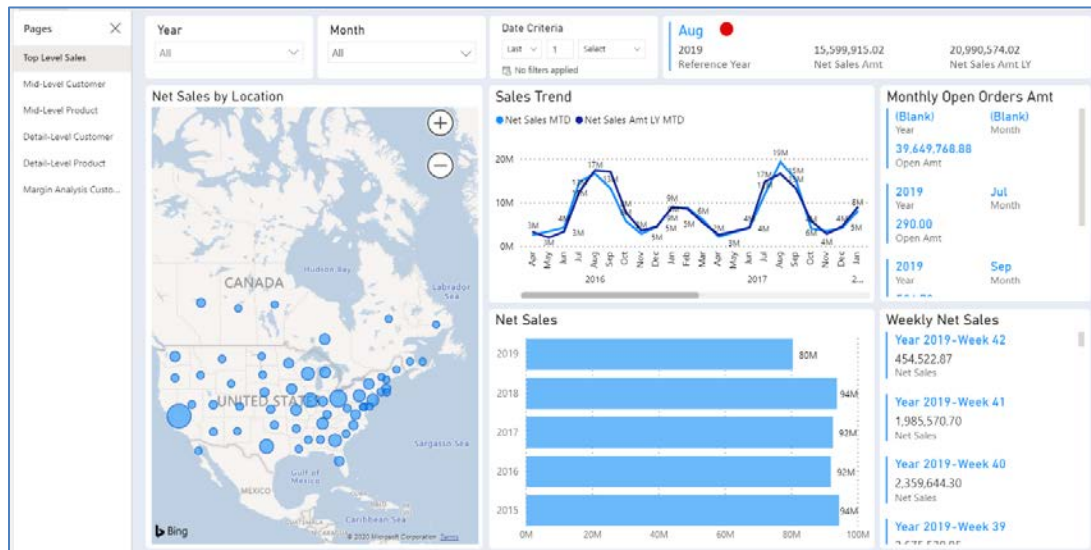
The Power BI reports focus on the following:

- Sales and Orders
- On-Time, In-Full
- Warehouse Management
- Chargebacks

## Sales and Orders Analysis

The BI visuals built on top of the Apprise Data Warehouse display your company's sales and orders data in a simple yet comprehensive manner.

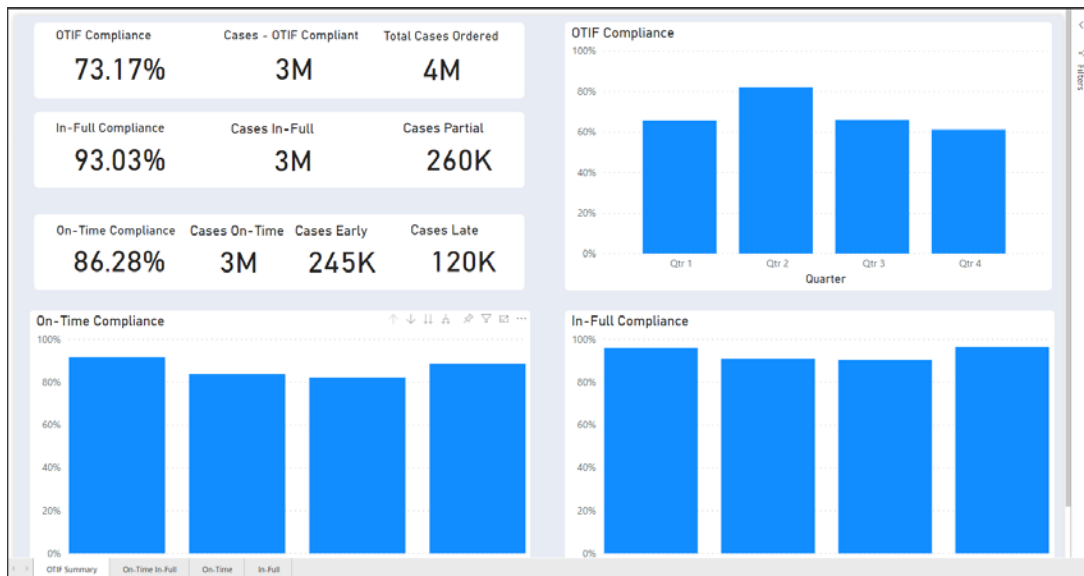
The Sales and Orders Report visualization includes performance based on the sales history and orders from a company-wide perspective to the detailed level of a customer and a product. The data is gathered from the invoice lines and order lines.



You can use this report to analyze whether your sales are increasing or declining. Sales analysis report visualizations allow you to dig deeper and find out why your sales are declining, which products, customers, and so on, so you can take corrective actions.

## On-Time In-Full Analysis

The On-Time In-Full (OTIF) Report visualization includes data related to On-Time (OT) and In-Full (IF) deliveries, which is a measurement of logistics or delivery performance within a supply chain.

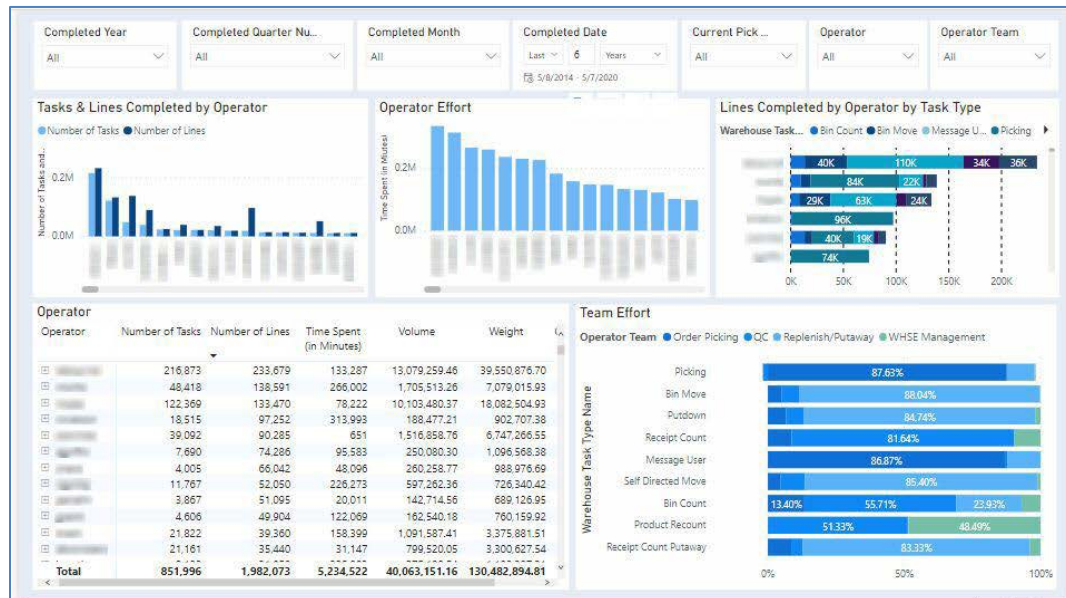


The OTIF Report visualization lets you view the performance of on-time and in-full deliveries from the business level as a whole to the focused level of either on-time or in-full deliveries for the selected duration. Analyzing your OTIF score can help you identify the root cause of late deliveries and/or short shipments so that OTIF scores can be improved in the future.

## Warehouse Management Analysis

The Warehouse Management Report currently focuses on the following main aspects:

- Warehouse Performance Analysis - Compare the performance of various warehouses along key performance indicators like picking accuracy, shipping (from warehouse) accuracy, lines per hour (LPH), and percentage on-time shipments.
- Picking Analysis - Involves analysis of products on the basis of number of picks completed. It also includes analysis of products which tend to be picked together for grouping of products during picking. Picking analysis can significantly improve warehouse efficiency and help with re-organizing the layout of your warehouse.

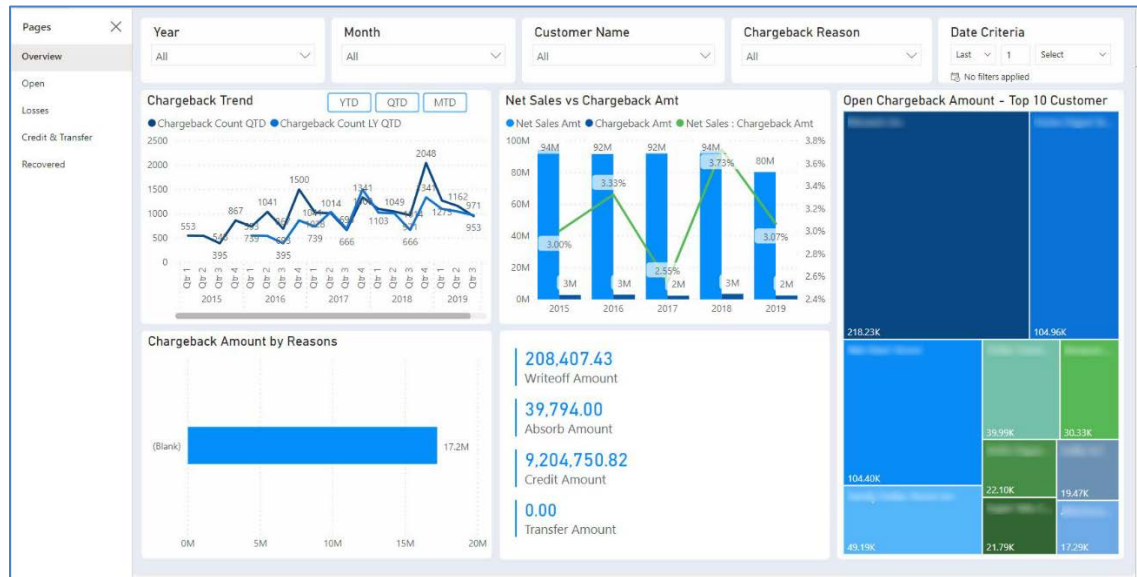


The Warehouse Management Report visualization allows you to analyze the following:

- Operator's activity for the selected task and period
- Product movement in the warehouse
- Shipping details based on product and customer
- Warehouse task groups
- Data for various warehouse tasks

## Chargeback Analysis

The Chargebacks Report visualization includes data related to chargebacks.



The Apprise Chargeback Report visualization provides you an overview of the chargebacks from a company-wide perspective, and allows you to drill down and track chargeback reason codes to help you analyze the root cause of chargebacks. The BI visuals let you analyze and display your company's chargeback data, which helps you monitor the chargebacks, for example, aging chargebacks and chargebacks nearing their expiration dates. This report also allows you to analyze credit and transfer data, chargeback-related losses, as well as recovered amounts.

## EDI Advanced Shipping Notice Compliance Report

In Apprise Version 8.2.0, the compliance report for EDI advanced shipping notices is updated to include the following information if the line level contains compliance errors:

- Order number
- Order line number
- Line item code