Eclipse
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Designed by distribution experts

Epicor has been working with distributors for more than 45 years and understands that distributors have unique business software needs. Our enduring success has been driven by a core focus on business applications that have been designed for distributors. Epicor® Eclipse™ software is a leading distribution ERP software solution that offers powerful capabilities for wholesalers in the plumbing, HVAC, electrical, and PVF industries and is a fine example of our commitment to distributors.

Eclipse is built upon the premise that it needs to work the way distributors work—not the other way around—while also delivering best practices for distribution operations that help drive costs out of the supply chain, increase sales and margins, and improve customer service.

Your distribution must enable and simplify all of your business transactions. Eclipse features a unique, intuitive user interface that makes it easy to interact with your customers while conducting business. For example, the system enables you to eliminate communication breakdowns in your organization through true task automation and digital to-do lists. Self-populating, self-cleaning work queues inform every employee in your company about important matters that need their attention—such as a sales order that may be held up because of a credit hold, but is really of vital importance to a customer who is unaware of any account issue or thinks the matter has already been resolved.

Epicor goes beyond developing technology—we employ people with industry expertise to help you achieve results and give you an edge over the competition. We are one of the leading technology partners in the industry with more than 4,500 distributors using an Epicor solution.
**Deployment Choice - Cloud**

**Wireless Warehouse Management**
- Receiving and Put-Away
- Pick, Pack, Ship
- Group and Zone Picking

**Job Management**
- Manage Large Commercial
- Hold for Release and Lighting and Switchgear Projects
- Bid Schedules
- Project Management
- Inventory Movement
- Physical/Cycle Counting
- Change Order

**Production Management**
- Work Order Processing
- Kits and Assemblies
- Third-Party Processing
- Progress Billing
- Cut Product Management

**Supply Chain Management**
- Purchasing Management
- Advanced Demand Forecasting
- Automated Replenishment
- Inventory Optimization
- Customer and Vendor Managed Inventory

**Document Imaging**
- Content Protection
- Document Retention
- Auto-Barcode Indexing
- Workflow
- Full Integration

**Business Intelligence and Analytics**
- Operational Reports/Dashboards
- Descriptive Analytics (Business and Financial User Reporting/Dashboards)
- Diagnostic Analytics (Scorecards/KPIs, Financial Planning)
- Predictive Analytics (Forecasting)
- Role-Based Analytics and Business Intelligence
- Mobile Business Intelligence

**Business Architecture**
1. Cloud or On-Premises Deployment - Linux
2. Java
3. NOSQL Universe
4. API

**Deployment Choice - On Premises**

**Financial Management**
- General Ledger
- Accounts Payable
- Accounts Receivable
- Financial Reporting
- Tax Management
- Credit and Collections

**Customer Relationship Management**
- Contact Management
- Opportunity Management
- Mobile Access
- Loyalty Program Management

**Sales Order Management**
- Quote and Order Management
- Counter Sales
- Integrated Credit Card
- Automated Rebates/SPA
- Mobile Sales
- Integrated eCommerce
- Strategic Pricing
- Comprehensive Matrix Pricing

**Product Management**
- Product Data Management
- Import/Export Data
- Product Data Warehouse
- Taxonomy
- Manage Accessories and Substitutes
- Product Costing

**eCommerce Solutions**
- B2B and B2C Channel Support
- Full Integration
- Compelling Storefronts
- Mobile Access
- Real-Time Stock Levels
- Search Engine Optimization

**System-Wide Business Management**
Designed for Your Industry

Eclipse is designed to address the various distribution processes encountered in today’s ever-changing, dynamic supply chain. Epicor has been providing for emerging distributors, midsized companies, and subsidiaries of large multinationals for more than four decades. Epicor Eclipse can support your company’s growth with deep, industry-rich functionality that will set you apart in ways that other solutions simply cannot match. No matter the size or diversity of your supply chain, Eclipse can get you to the next level and beyond.

Eclipse has a long heritage of customer-focused development and has evolved to meet the needs of distributors in these:

- Electrical
- HVAC
- Plumbing
- Pipes, valves, and fittings (PVF)

Extensive experience developing solutions for some of the leading distributors in these industries uniquely positions Eclipse to manage the requirements of distributors of all sizes in electrical, HVAC, plumbing, and PVF verticals. Epicor is either a member or preferred provider to more than 40 industry associations and marketing or buying groups such as A-D, IMARK, Equity-EDN, ASA, WIT, HARDI, and Blue Hawk.

Sales Order Management

Order entry

Quick, efficient order processing reflects well on your business and has numerous benefits. For starters, customers are often less sensitive to prices and tend to form lasting relationships with distributors that consistently provide quality service. Taking an order can often seem like one of the most complex parts of the selling process—different item numbers for the same product, kit builds and customized parts, different delivery options for different line items, and multiple forms of payment all mean that order processing can get complicated very quickly. Your system should make handling these challenges routine. Eclipse has all of the tools necessary to simplify and speed the ordering process along.

Beyond the expectation that orders be taken quickly and accurately, the software should enable the person taking the order to have all of the information about the account, product, order history, and delivery logistics needed to serve the customer. Eclipse lets you easily manage the entire sales order process from beginning to end. With a single keystroke, you can check inventory, review credit, look up item information, and much more—putting together orders that are as simple or as complex as you need them to be without any additional
Personalized customer experience

Eclipse allows you to create a curated experience for your customers with unique, customer-specific part numbers, loyalty points and rebate programs, and personalized document print styles. These are nice features to have, but when it comes right down to it, price matters the most because it can make or break profitability—which is why Eclipse allows you to maintain customer-specific pricing, so that each customer pays exactly the price they should be paying based on their relative value to your business.

Eclipse Mobile

Eclipse Mobile enables your field sales team and other remote employees to be more productive by providing them access to view, create, and edit commonly used information in Eclipse—such as customers, contacts, items, orders and dates, AR, pricing, and location availability. Designed specifically to display on tablets and other mobile devices, Eclipse Mobile is a browser-based solution that can be used wherever you have an Internet connection. Eclipse Mobile simplifies information lookup with a single search field that scans all available data sets in the system—such as customers, contacts, and items—all from one screen. Use the mobile search to add items to a customer’s shopping cart or to copy an existing bid or order to create a new cart. Mobile shopping carts respect each customer’s credit control and pricing settings. Employees can also attach line item comments, update pricing, and include shipping instructions. All of the information they need is at their fingertips.

In addition to remote order entry and item lookup, sales staff can use Eclipse Mobile to better manage opportunities and track activity from site visits. A Salesperson Dashboard reveals trending information about year-to-date actual sales compared to budgeted sales figures with a view of the individual rep’s opportunities, so reps always know if their performance is on target or not.
Job Management

Eclipse Job Management is a real-time, web-based designed to manage large commercial lighting and switchgear projects and is fully integrated with Eclipse. Job Management allows distributors to manage aspects of a job—including bidding, bill of materials (BOM) management, submittal status tracking, managing releases and change orders, customer billing, and vendor invoice reconciliation. Job Management also includes a Financial Summary that provides a financial snapshot of the job at any time.

Awarding jobs

The nature of the job business is that you win some and lose some. To track that information, Job Management allows you to indicate which jobs have been won and which have been lost. For lost jobs, you can indicate who the competitor was and the reason it was lost. This information—along with win information—is displayed in the Job Won/Lost Report to help you evaluate your win-to-loss ratio, as well as to determine the value and cost of the jobs that you might have lost.

Managing purchase orders and releases

After you award a job to a customer and finalize the cost/sell information with your vendors and the customer, you can begin to create purchase orders (POs) for the items on the BOM. As you create these POs, Job Management sends them to your vendors and creates direct orders that you can view in Eclipse. Each direct order created contains both the sales order for the customer and the PO for your vendor. For material that you have in stock, Job Management creates standard sales orders.

Direct Through Stock

Sometimes, customers will ask you to manage inventory they own and ship it to them as they need it on the project. Job Management offers the complete management of customer-owned inventory via the Direct Through Stock process. The customer orders and purchases stock through the standard order entry process but requests that you house the material in your warehouse to be delivered later or piecemeal as your job requires. Direct Through Stock material is ordered and billed to the customer through Eclipse.


**Submittals**

For some jobs—or for some items on a job—you might need to track and/or send a submittal document to your customer that contains details about the quantity, type, product descriptions, and manufacturers for the items on the BOM prior to purchasing any products. Job Management allows for this via submittal tracking. Use submittals for record keeping purposes or for approval regarding the contents of the BOM prior to ordering items for the jobs from your vendors. Submittals also let you attach specification or detail sheets to the items. If you have stock products on a BOM, you can attach images and specification sheets to those products in Eclipse software by attaching the image to the product record in Product Maintenance.

**Change orders**

Since every project will have changes, Job Management allows you to track and process changes orders. Use change orders to make changes such as quantity or pricing updates to the items you are ordering from that vendor. Change orders allow you to track material and dollar changes past the original purchase order for the job. Change orders provide a way to send pending or approved orders to your customers or your vendors regarding the updates to material required for the job. The Create Change Order page provides a single place where you can see the totals associated with the changes you are making for the job and to enter the updates to the quantities and prices for the items on the job. As you approve change orders, the system adds the orders to the Financial Summary and creates the orders in Eclipse software.

**Financial Summary**

The Financial Summary provides a real-time financial picture of a job. It tracks transactions through the entire job history and reports costs and margins as the job progresses. You can use the Financial Summary to compare costs and margins on initial totals with current job totals and change orders, see a summary by vendor, see customer invoices and payment, or even see vendor invoices and payment. The Financial Summary allows you to determine if you are making or losing money on this project.

**Inventory Management**

“Right item, right place, right time” is one of the single most important rules for virtually every distributor, as inventory is the life-blood of the business. Successful distributors maintain appropriate stock levels for high service level items that generate profits and pare stock of items that are less profitable. Eclipse enables you to balance your customer service needs while maximizing your return on investment by increasing inventory turns and reducing your inventory investment.

Built-in management tools let you easily calculate your inventory value in real time and enable you to turn around your inventory counts quickly and efficiently—through use of cycle counting functionality and system produced count sheets.

Eclipse software lets you monitor your inventory investment with rolling 365-day gross margin return on investment (GMROI) analysis and track details for:

- Consignments
- Rentals
- Lot items
- Hazardous materials X Serial numbers

Of course, success also means being able to record and track all of the necessary information for effective inventory management and provide rapid access to critical product data. Among UPC codes and User Classifications, Eclipse software provides the ability to enter unlimited product descriptions, substitute products, and track manufacturer safety data sheets (MSDS).
“We could not have accomplished this growth so easily without Epicor Eclipse. Every time I do something new with Eclipse, it saves me time and money. It’s so versatile—anything we want it to do, it will do.”

Mark Temple | Johnstone Supply of Tulsa

Product life cycle management

While every distributor has some slow-moving inventory, they tend to deal with it in different ways—depending on the type of business. Regardless, identifying and managing dying and dead stock is vital for overall profitability, cash flow, and warehouse efficiency. Eclipse provides the tools necessary for gauging how fast an item will move through the warehouse and assigning the appropriate life cycle status and related rules for pricing, selling, returning, transferring, etc., so that you can not only track and manage these items out of existence, but also adopt proactive strategies for reducing the effects of obsolete inventory in your business.

Product Data Warehouse (PDW)

The PDW streamlines product file management by linking your products and pricing matrices with several thirdparty content providers—most notably, the National Association of Electrical Distributors (NAED) and Industry Data Warehouse (IDW). Utilizing leading-edge data transfer technology, the Eclipse PDW module automates the exchange of electronic product and pricing information from the Internet directly into the core Eclipse application.

By eliminating the need for a separate server to receive and upload product and pricing updates, the Eclipse PDW module significantly enhances how you manage critical business data.

Real-time, up-to-the-minute import of product pricing information enhances sales order entry accuracy and eliminates the creation of duplicate non-stocks. PDW also eliminates manual file maintenance by automatically updating pricing, discount classes, sell groups, units of measure, and products with industry standard descriptions.

Pricing Management

Pricing is one of the most complex front office activities in any distribution business. The ability to be nimble when it comes to pricing is a strategic advantage, and this means being able to leverage multiple pricing schemes across the network. The Eclipse price matrix offers unparalleled flexibility to handle your complex pricing and costing rules. As well as utilizing strategies such as class-specific pricing for items or groups of items, you may also leverage quantity break pricing. Customer-specific overrides and promotions are no problem, either.

Eclipse offers complete support for the electrical industry’s Special Pricing Agreements (SPAs) for ship from stock and debit rebates to Small Project Jobs (SPJs). Keeping rebate data up to date can be a daunting task. Utilize EDI 845s to streamline the process for receiving rebate data from your vendor, as well as claiming the rebates—via an EDI 844—and getting credit from your vendors (EDI 849).

Eclipse Software allows you to maintain past, present, and future pricing simultaneously, while calculating price points between linked channels—for example, contractor (bid pricing) and homeowner (retail)—and track all price changes that happen along the way.
Purchasing and transfers

Making decisions about whether to purchase or transfer inventory should not be difficult—in fact, you shouldn’t have to spend much time thinking about it at all. System-automated purchase and transfer functions should control these activities so you can focus on more important tasks. Eclipse software enables exible procurement for both distributed and centralized purchasing and warehousing.

The system will automatically calculate product demand by branch, and will utilize multiple and dynamic inventory replenishment methods to provide you with the ability to lower carrying costs, minimize excessive obsolete inventory, improve cash ow, and increase customer service levels. Ultimately, the system lets you concentrate on managing the business—not the product itself—by balancing buying opportunities with carrying costs and executing on system-generated purchase or transfer suggestions.

In some cases, you may even wish to automate the transfer process. Eclipse software provides the ability to do this based on:

- Committed sales
- Day’s supply
- Branch transfer schedules
- Surplus inventory

Warehouse Management

An efficiently run warehouse with solid logistics is vital to profitability, as well as long-term trading partner and employee satisfaction. Problems in the warehouse breed frustrations that eventually migrate to other areas of the business and beyond. Workers need tools that are easy to use and enable them to solve problems without creating additional headaches that get pushed downstream to other warehouse operations.

Inbound to outbound, Eclipse provides warehousing tools to help workers manage complexity, execute flawlessly, and determine the best ways to drive continuous improvement in the warehouse. You can deploy your warehouse using our fully integrated RF warehouse automation package or a more manual approach. Either way, you’ll have robust functionality—such as item tracking across multiple product bin locations or location type and intuitive transaction checks that allow for quick put-aways based on urgent customer needs. Simplify receiving with Advance Ship Notices (ASN), set your own order fulfillment priorities, and auto-assign routes to sequence your delivery orders by shipper—with Eclipse, you have a more complete picture of what is coming in and going out of your warehouse.

Provides up-to-the-minute information transmission of warehouse activity to your Eclipse solution for real-time visibility and control of inventory. Warehouse management teams can verify receiving, putaway, and picking activity—immediately responding to inventory discrepancies that show up through cycle counts and preventing them through automatic replenishment and product movement. Built on the Eclipse Warehouse API, the WMS Picking app is now available for use on Android devices for a handsfree, lower cost device option in your warehouse picking process.

Carton packing

When your customers receive a shipment of multiple packages—each with multiple items and quantities—they benefit from verification of the contents of each package. Eclipse Carton Packing provides a label on the outside of the box, pallet, bag, or bundle that clearly identifies the contents and quantities of each carton type—reducing follow-up inquiry calls from customers. Items and quantities are validated as they are packed to improve fulfillment accuracy and tracking of outbound shipments, plus you can include package level information in your outbound EDI 856 transactions.
Proof of Delivery (POD)

The Epicor Proof of Delivery module enables your drivers to view daily route information, maps, and driving instructions from a smart phone. They can also access notes and drill into details for each delivery and—as the name implies—capture the signature and name of the person receiving the delivery. A driver can also record any issues that may arise at a stop—damages, location closures, no one available, etc.

POD also works to help ensure that drivers keep to their schedules with clock-in/out functionality that tracks how long a driver stays at each stop. Also, POD will provide Over the Air delivery of lists to update drivers while still on the road. For example, a return material authorization (RMA) may be issued for a customer along the route, and the RMA that was created in the ERP can be added to the delivery list for pickup at that customer site. Likewise, drivers are prompted if there is any payment (COD) due at delivery.

Accounting and Financial Management

It’s no secret that diligent financial management can actually drive dollars to your bottom line. Integrated accounting controls in Eclipse help you manage your cash flow and limit your exposure to delinquent accounts across four key areas.

Purchasing and transfers

True control over accounting periods, unlimited access to historical data, advanced reporting capabilities, and the ability to manage at multi-branch, multi-territory, multi.company, and multi-level means the General Ledger in Eclipse can let you take a flexible approach to managing your accounts.

Eclipse makes it easy to do business with your partners outside of the country—letting you track multiple currencies, issue purchase or sales orders in foreign currencies, or tie foreign currency transactions back to the appropriate Accounts Payable (AP) and Accounts Receivable (AR) functions.

“Everything we needed was integral to Eclipse—with all transactional flows and processes under one umbrella. The keys are the intelligence built into the system and the Epicor support staff that understands our issues and addresses them.”

Ls Johnson, VP of Information Technology and CIO | North Coast Electric
The data in Eclipse Software is always in real time, so balances like your customers’ Accounts Receivable and credit status are always current. The transactions that make up your numbers enable you to drill in to see the details that make up any balance.

Solving discrepancies in Accounts Payable is an expensive process that takes time and adds little value to your business. Streamline this process with the Eclipse Purchase Order Variance Queue, which allows AP to identify issues and seamlessly communicate them to the writer or the warehouse people that need to solve them. Furthermore, fully integrated EDI creates payables and matches each payment made—whether by check, credit card, EFT, or ACH—within Eclipse.

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**Credit management**

Eclipse provides confidence of control over your entire credit management process—allowing you to monitor your customers’ credit status at every step of the sales order; invoke credit, past-due, and per-order limits as you see fit; or set both passive and/or aggressive credit controls throughout your entire business.

Whether you are managing a multi-million-dollar job or a small contractor, Eclipse credit controls will allow you to tailor settings that provide visibility to make the best credit decisions possible. The AR Collection Queue provides realtime visibility in a prioritized fashion to help maximize your collection efforts. Manage the process of lien tracking with clear visibility to deadlines that preserve your lien rights.

**Business Intelligence**

Eclipse offers you seamless access to key business performance metrics such as gross profit percentage, cash flow benchmarks, customer service levels, inventory turns, and more. That means you always have the information you need to make better, more informed decisions, which translates to a substantial competitive edge.

**Epicor Data Analytics (EDA)**

The Epicor Data Analytics (EDA) service enables unprecedented levels of business insight to help companies grow by identifying new opportunities, improving productivity, and speeding decision-making. The Epicor Data Analytics service provides interactive dashboards for easy comprehension and analysis of your business data from Eclipse and other sources. EDA also enables constant connectivity to your business with your mobile device of choice and a fast ROI with minimal front-end cost, low operating costs, and a simple solution.

**Activity-Based Costing**

Eclipse Activity-Based Costing lets you assign resource costs to activities, so you can uncover the hidden costs of business processes and accurately monitor the profitability of customers, items, product lines, and vendors.

Takes the guesswork out of finding the optimal price for an item. It is based on the principle that for every product and customer, there is a price that produces the optimal gross margin—the highest margin you can obtain while retaining the customer’s business. What that price is depends on multiple factors—from the amount of business you do with a customer annually, to the particular item being ordered. Up until now, determining that right price for every item has been a formidably complex task. However, the task becomes as simple as a few keystrokes to help you give your customers the best price—not too high, not too low, but just right to protect the ever-delicate balance between profitability and customer satisfaction.
Eclipse contains hundreds of pre-configured reports or inquiries, and the Eclipse Report Writer allows you to create your own custom reports for a more nuanced view of business activity. Any reports in Eclipse software can be scheduled to run at a user-defined interval and can be delivered right in Eclipse or by email.

**Electronic Data Interchange (EDI)**

EDI for Eclipse is a fully integrated electronic document processing solution that lets your company conduct routine business transactions through an automatic computer-to-computer exchange of business documents—without the need for third-party software.

By using Eclipse EDI to electronically process documents for purchasing, scheduling, and sales activity, you can significantly lower administrative costs. In addition, its simplicity and speed allow you to strengthen customer relations, reduce inventories, and shorten sales cycles.

**Automated Backup Solution (ABS)**

The data gathered by your Epicor solution is one of the most valuable assets in your business. Inventory can be replaced, but data is irreplaceable if lost or damaged. Backing up your data is another means of insuring your business and should be a part of a normal routine. This means maintaining tested backup copies in a safe, off-site location so that data recovery is possible if disaster strikes.

ABS provides off-site data backup storage to our secure location and is a dependable first step in enabling your business continuity plan. For failover, all you need is a supported VPN device, and Epicor takes care of the rest. Your data is private and remains protected until you need it. Then, it can be restored to your server or uploaded to a production site—depending on your requirements.

**Epicor Commerce Connect**

Fully integrated with Eclipse Software, Epicor Commerce Connect (ECC) is an essential capability for distributors to modernize their business, connect with more customers, and get the productivity of a cloud-based business system.

- Attract shoppers and grow them into business accounts with B2C and B2B website tools
- Lower your costs with tightly integrated eCommerce, business processes, and content management
- Promote your business, strengthen your online presence, and shorten sales cycles
- Develop new sales leads and grow accounts
- Provide mobile access for fast information access
- Lower costs for customer support and quickly add new product lines and vendors

**Technology That Enables Transformation**

Business today is fast paced, highly competitive, and more demanding than ever before. In order to remain competitive, distributors need tools to extend their ERP systems to their exact business processes.
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Designed to help your distribution business scale, change and grow, Epicor Eclipse software offers a powerful API that allows distributors to connect to the systems that make their business unique and help differentiate themselves from the competition.

Contact us today to learn more about how Epicor Eclipse can help you grow your distribution business.

Epicor University

We want to help ensure our users take advantage of all of the benefits of our software, and Epicor University (EU) has the comprehensive training tools and resources you need to do so. We provide tools such as Training on Demand, Knowledge on Demand and Online help that assist you in educating and retaining employees and provides career development. We provide tools to create an entire training program and make it easy for you to on-board new employees.

“Eclipse is a great foundation on which to run a business, and we have really leveraged the technology. With Eclipse in place, we have very few ‘fires’ to put out. Everything at our facilities is calm and organized.”

Mike Smith, Chief Operating Officer | OneSource Distributors