Eclipse Job Management

Intuitive bid and job management tools make it simple to order and manage large electrical, HVAC, and plumbing distribution jobs.

Grow Your Business with Commercial Job Management

Unlike standard orders with a single customer and a handful of items, large commercial lighting and switchgear projects can be a messy process. Commercial projects can involve multiple customers, different bills of materials, bid schedules, multiple lighting reps, both unit, and lot costs/prices, hold for release purchase orders, multiple changes orders, and can run for months—if not years. In many cases, you may not know if a job is profitable for weeks or months after it’s completed. To manage large projects, you need an industry-focused application built specifically for that purpose.

Eclipse Job Management is a real-time, web-based solution designed to manage large commercial lighting and switchgear projects and is fully integrated with Epicor Eclipse. Job Management allows distributors to manage all 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.

Job Bidding

Job Management allows you to associate multiple customers with a job. Since bid requests from different contractors may contain different counts, you can create customer-specific bids with their unique counts. Once the bids are created, you can easily send requests for quotes (RFQ) to vendors via fax or email. Updated prices from vendors can be manually entered allowing you to compare vendor pricing information and decide which vendors to use for the job.

For some items, you’ll have unit prices while others will be lot prices. Job Management allows you to handle both—indicating at the line item level how the item is priced. Should you decide to unit price the entire job, an intuitive print feature allows you to generate the customer-facing quote lot priced.
To help you manage bid deadlines, Job Management provides a Bid Board. Use the Bid Board to see at a glance what bids you have coming in. The system displays the bids by day and also shows the time and job that needs to be handled. From here, it’s easy to send bids to customers using email, fax, or by mailing printed forms.

**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.

For awarded jobs, Job Management allows you to indicate the appropriate customer and any necessary information such as contact, shipping, and credit information. After you award the job in Job Management, you can use the Job Summary page to track and reference the overall job status, financial information, job-related transactions, job settings, and all documents for the job.

You can still negotiate costs from your vendors and sell prices with the customer and modify the BOM as necessary before generating purchase orders for the job.

**Engineering fees for jobs**

For some of your jobs, you might work with a manufacturer representative when bidding on items. These representatives add value to the supply chain by providing a one-stop shop for distributors for sourcing, costing, and bundling material needed for large and potentially complex jobs. The representatives do most of the leg work for identifying all the material needed for the job and determining the appropriate manufacturer and product types. In return, you pay them an engineering fee. You can define engineering fees that you are charged for a job directly on the BOM and create purchase orders for those fees. You then apply these fees during the receiving process.

**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.
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.

Since most projects don’t immediately ship or ship at the same time, Job Management allows you to create the following PO types for each vendor:

- **Reserve PO**—This reserves the order number for future use and sends the number to the vendor. Reserve POs are not required, however, your vendor might require a PO number prior to working with you regarding pricing for the job.
- **Hold for Release PO**—These tell your vendor what items you need for the job and create a direct order in Eclipse, but they don’t authorize the vendor to ship any items to your customer. As the job progresses, you authorize the vendor to send shipments of the items using Release POs. Hold for Release POs are not required unless you are creating partial releases for a job. Hold for Release POs are useful as a communication tool to tell your vendor what items you need for the job—especially when you are ordering a large number of items.
- **Release POs**—These tell your vendor that they can ship items to your customer and generate a direct order in Eclipse, based on the customer and vendor information specified for the job. If you create a Release PO for stock items, the system creates a standard sales order—not a direct order.

**Direct Through Stock**

Sometimes, customers will ask you to manage the 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 request 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 specifications 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 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 change 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.
We’re here for the hard-working businesses that keep the world turning. They’re the companies who make, deliver, and sell the things we all need. They trust Epicor to help them do business better. Their industries are our industries, and we understand them better than anyone. By working hand-in-hand with our customers, we get to know their business almost as well as they do. Our innovative solution sets are carefully curated to fit their needs, and built to respond flexibly to their fast-changing reality. We accelerate every customer’s ambitions, whether to grow and transform, or simply become more productive and effective. That’s what makes us the essential partners for the world’s most essential businesses.

Key Features

- Helps manage commercial projects from start to finish
- Generates bids for multiple customers if needed
- Manages complex bill of materials
- Tracks the job bidding schedule
- Tracks submittals
- Manages release orders and change orders
- Manages direct through stock material
- Job Financial Summary

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.