Epicor® Eclipse™ for
HVAC Distributors

Functionality

- ▶ Quotes and Orders
- ▶ Front Counter
- ▶ Customer-Specific Pricing
- ▶ Contract Pricing
- ▶ Companion Items
- ▶ Order History
- ▶ Assemblies
- ▶ Lot Billing
- ▶ Release Scheduling
- ▶ Proof of Delivery
- ▶ Rebate Management
- ▶ Inventory Control
- ▶ Integrated EDI

Grow Your Business With a Solution Built For Your Industry

Today's leading HVAC distributors—including MORSCO, TORRCO, Canyon Pipe, Johnstone Supply, and more—trust the Epicor® Eclipse™ business management solution to run their businesses efficiently. Epicor is an active member of leading trade associations such as the HARDI, WIT, AHR, Embassy Group, BlueHawk, and other associations and buying/marketing groups. Our experts have spoken at many industry conferences and have written articles for Supply House Times, The Wholesaler, Distribution Trends, Plumbing Advocate, and other industry publications. Additionally, because we strive to provide HVAC distributors with the best solutions to help them meet their business goals, we regularly seek out the input of our customers in the development of our solutions and services.

EPICOR.

In Your Industry

As an HVAC distributor, you face new challenges every hour of the day. You might serve contractors before dawn, deal with puzzled homeowners at noon, and ship everything from furnace control boards to gas valves until closing time. You need an enterprise software solution that helps you meet the industry-specific challenges you face on an hourly basis. Epicor provides that solution with the front counter capabilities to handle walk-in customers, the features essential to handling dozens of manufacturers' rebates, and functionality designed to help you never miss a sales opportunity.

A Comprehensive Solution

With more than a half-century of distribution experience, Epicor can help you grow sales, improve margins, and increase productivity with enterprise resource planning (ERP) systems that can keep you healthy and thriving in today's highly-competitive marketplace.

The Epicor Eclipse solution is a leading ERP system for HVAC distributors. Eclipse combines proven distribution expertise with an end-to-end business system and modern technology stack. Cloud and on-premises deployment options are available, so you can start with the on-premises version and easily migrate to the cloud as your needs change.

Epicor Eclipse enables your most critical business areas to work more efficiently with tools such as:

▶ Customer Relationship Management
▶ Order Management
▶ eCommerce
▶ Job Management
▶ Inventory Management and Purchasing
▶ Wireless Warehouse Management System
▶ Finance and Accounting
▶ Business Intelligence

As an HVAC distributor, you need a technology provider who understands your needs. You must also choose a business partner with wide-ranging industry expertise and a vision to help guide you into the future—Epicor offers both. When you partner with Epicor, you can expect high-quality technology solutions and professional services, as well as the industry-specific functionality you need to drive your business forward. We understand your industry and can help make your business better.

Quotes and Orders

Your order management processes directly affect your customers and how they view your business. Customers demand faster, better service and will go elsewhere if you can't meet their needs.

Eclipse software enables you to complete the entire order entry process from one screen, allowing you to:

▶ Enter quotes and orders
▶ Convert quotes to orders
▶ Check stock
▶ Expedite orders
▶ Search price and availability requests
▶ View past invoices
▶ Verify shipping preferences

Whether orders are entered at the counter, remotely via a mobile computing device or laptop, or over the web, information goes directly into your Eclipse solution for faster processing—eliminating manual work and rekeying errors.

Front Counter

Whether you have a small counter or a large customer self-service area, you'll need point of sale (POS) and front counter capabilities. Epicor Eclipse has the front counter tools necessary to quickly and efficiently handle that early morning rush. You can help any customer on the spot by accessing your entire inventory from the Order Entry screen. You can also offer a price, place the order, and then accept payment or record the transaction for invoicing.

To speed the order entry process, items can be manually entered or scanned using a wireless or USB bar code scanner. Customer credit can be checked on the fly, and notifications can be sent immediately to the credit manager in the event of an exception. Payments can also be entered on the transaction—including the ability to accept cash, check, or credit card payments. The Epicor integrated credit card processing solution enables you to accept customer payments with credit or debit cards and receive immediate authorization.

You can avoid the inefficiency and inaccuracy of separate terminals while simultaneously simplifying and lowering your costs to comply with the payment card industry (PCI) security standards.

Having proof of pick-up—such as the signature of the person who completes the pick-up on the invoice—can prevent messy

disputes and expedite payment. Front Counter Signature Capture uses a simple, easy-to-install capture device that fully integrates with the Eclipse Order Entry module to instantly provide you with a permanent record of what left the warehouse, when, and with whom.

Customer-Specific Pricing

You can probably count on your core customers to order certain products from your company on a regular basis. It makes sense for you to reward frequent customers and encourage return business by offering special pricing. When a manufacturer offers you a price break, you may want to pass those savings on to your customers.

Eclipse software gives you the flexibility to set prices as you see fit—including offering select customers preferred pricing, offering pricing based on quantity breaks, and setting promotional pricing—ensuring you maintain your margins while meeting customer and competitive demands. You can even set start and end pricing dates on a customer, product, or product group basis to meet contractual obligations or for limited-time specials.

Contract Pricing

For many customers, you'll need to negotiate pricing down to the item level—establishing fixed, time-based net prices on a SKU-by-SKU basis. Epicor Eclipse enables you to set up time-sensitive contract pricing for these customers. Contract pricing is fully integrated in Quote/Order Entry to ensure the customer gets the right contract price on each transaction. Additionally, starting and ending dates on contracts allow you to track when contracts are expiring and set up contracts that will automatically kick in on the starting date.

Companion Items

With the built-in ability to suggest accessory items and substitutions, you can grow your margins and make even your most inexperienced sales people sound like seasoned pros. Does every one of your sales and service representatives know—or remember—to offer "go-with" items? Epicor Eclipse solves this issue by automatically suggesting products that go with items on a customer's order—helping to increase sales and improve customer satisfaction. In addition, Epicor Eclipse software automates substitution processes. For example, if one of your most popular SKUs is backordered, the solution will remind your sales representatives to offer a similar—or

identical—product. This feature helps to ensure that you will never turn customers away because products are out of stock.

Order History

How often do you deal with customers who ask for the same item they purchased in the past? When you ask for more specific information, do they only remember a portion of the item information, the quantity, or the date they bought it? Eclipse software includes an order history search that allows you to search through the customer's sales history. You can narrow your sales history search by date range or keywords and—in a few simple steps—add that item to the customer's current order. This saves time and eliminates trips to the file cabinet to thumb through old invoices.

Assemblies

Assembly and bill of material functionality enables you to keep items like a tool kit in your solution—at one price with one item code—eliminating the need to re-enter a long list of line items each time you sell and assemble the items. This saves order-entry personnel time and prevents costly errors and mix-ups. Customer service representatives can also increase sales by up-selling assembled or manufactured products when customers request groups of items.

The same functionality also takes the guesswork out of determining how many items or kits you can assemble with what you have in stock. When your customer calls to request an item with more than one part, the solution searches your database, finds all of the components necessary to manufacture a kit or assembly, and calculates the least common denominator of these pieces. In seconds, customer service representatives know exactly how many of a particular kit they can offer your customers without having to walk to the warehouse to manually find and count SKUs.

Lot Billing

Contractors handling huge projects often want to order all of the parts necessary for the job up front to ensure that everything they need is on hand when they need it.

However, they want to receive the material in stages and pay for it as they receive it. Lot billing capabilities enable you to first deliver and bill the contractor for rough-in materials, then invoice and deliver finished goods at a later date.

In addition, you can use lot billing functionality when quoting orders. When contractors request quotes for large projects, you can give them one price for the entire lot or individual lot prices for rough-in or finished goods. Quoting items in this manner can help prevent customers from shopping around and pricing goods individually—increasing your sales volume and improving your profit margins.

Release Scheduling

Even though contractors order everything at once, common sense dictates that rough-in items need to arrive at a job site before finished goods. After all, the hard goods under the floor like pipes and fittings are often installed months before the fixtures—especially on large projects.

Eclipse software lets you easily and efficiently handle even the most complicated release schedules. Simply set release dates for groups of items for your customers' jobs, and the solution will ensure that the right products are ready for shipment or pick-up at the right time. This improves customer satisfaction by helping you ensuring that your customers always get what they need, when they need it—while reducing confusion in the warehouse.

Proof of Delivery

Epicor Mobile Proof of Delivery is a fully integrated mobile companion for your Epicor system that delivers new levels of service responsiveness for efficient deliveries and pick-ups. With your choice of mobile device, you can maximize the effectiveness of your delivery resources while providing reliable, documented drop-offs and pick-ups.

Mobile Proof of Delivery puts virtually every delivery detail in the palm of your driver's hand to ensure reliable and documented deliveries to customers. Drivers can efficiently complete their delivery tasks using GPS location maps for fast, accurate service. From their mobile device, drivers can add important delivery notes or log issues—keeping your customer and business informed of delivery details.

Rebate Management

Many top vendors offer rebates that help distributors maximize profits. Robust rebate functionality helps you manage these rebates and ensures you have the functionality you need to take advantage of anything your manufacturers might offer. You can track vendor rebates electronically for more accurate books and a healthier bottom line. Simplify the often-tedious task of handling vendor rebates by automating the process. Each step—from negotiation, to receipt, and beyond—is recorded in real time and reflected in your solution's General Ledger and price schedules. This helps to ensure you never lose track of a rebate you earned and lets sales and order entry staff always see proper gross margins to offer customers appropriate pricing. Additionally, your accounting staff will benefit from the ability to produce detailed, easy-to-understand rebate reports—giving you the accurate, concise information you need to send to vendors to claim your rebates.

Inventory Control

Excellent inventory control is vital to the health of your business, and tracking your inventory effectively is key to maintaining good customer service and manageable stock levels. Strong inventory management capabilities help you meet service levels without investing too many valuable in stock.

Plus, it's the nature of the industry—certain items go in and out of style or are regularly replaced by newer, more innovative products. Track customer buying trends, so you always know whether to stock extra polished brass fixtures—or to replace them with chrome. This helps ensure that you keep the right items on your shelves at the right time—and reduces the chance of today's investment becoming tomorrow's dead stock.

Integrated EDI

Many of your customers and vendors will require you to communicate with them via EDI—expecting you to be able to receive and/or send the necessary EDI transactions. The volume of these transactions require any EDI to be fully integrated with your business system.

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.

Epicor University

We want to 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 onboard new employees.

Technology That Enables Transformation

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

Epicor Eclipse software combines proven distribution expertise with a modern technology stack—including Linux®, JAVA™, and NOSQL Universe.

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

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software designed to fit the precise needs of our manufacturing, distribution, retail, and service industry customers. More than 45 years of experience with our customers' unique business processes and operational requirements are built into every solution—in the cloud or on premises. With this deep understanding of your industry, Epicor solutions dramatically improve performance and profitability while easing complexity so you can focus on growth. For more information, connect with Epicor or visit www.epicor.com.

EPICOR

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