EPICOR ECLIPSE MIGRATION GUIDE

Comprehensive Guide for Electrical, HVAC, Plumbing & PVF Distributors

Data extraction, mapping, and migration strategies from Eclipse UniVerse to modern cloud ERP

UniVerse Database • REST API Extraction • Data Mapping • Migration Execution

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1. Understanding Epicor Eclipse

Epicor Eclipse is a distribution-focused ERP system designed specifically for electrical, HVAC, plumbing, and PVF wholesale distributors. Unlike SQL-based ERPs, Eclipse runs on a Rocket UniVerse (MultiValue/NoSQL) database on Linux, requiring specialized extraction approaches. This guide provides Eclipse-specific strategies for successful migration to modern cloud ERP.

1.1 Eclipse Architecture Overview

Eclipse has unique architectural characteristics that affect data migration:

- ☐ Rocket UniVerse NoSQL database (MultiValue architecture)
- ☐ Linux-based server environment
- ☐ Character-based (green screen) and Solar Eclipse (Java GUI) interfaces
- ☐ Eterm terminal emulator for client connections
- ☐ PICK BASIC (UniBASIC) programming language
- ☐ Non-relational data structure with dynamic arrays
- ☐ File-based data storage (not traditional tables)

1.2 Document Your Eclipse Configuration

- ☐ Current Eclipse version (e.g., 9.x series)
- ☐ Solar Eclipse version if applicable
- ☐ Number of concurrent user licenses
- ☐ Modules licensed and actively used:
  - ☐ Order Management / Sales
  - ☐ Counter/POS Operations
  - ☐ Inventory Management
  - ☐ Purchasing and Transfers
  - ☐ Warehouse Management (WMS)
  - ☐ Financial Management (GL, AR, AP)
  - ☐ CRM and Customer Calling Queue
  - ☐ Job Management (commercial projects)
  - ☐ Epicor Commerce Connect (ECC)
  - ☐ Eclipse Mobile
  - ☐ Document Imaging
  - ☐ EDI
  - ☐ Proof of Delivery
  - ☐ Product Data Warehouse (PDW)
- ☐ Custom programs and modifications
- ☐ Mass Load configurations
- ☐ Custom reports and dashboards
- ☐ Authorization Keys and security settings

2. Eclipse Data Extraction Strategies

Eclipse's UniVerse database requires different extraction methods than traditional SQL databases. Multiple approaches are available depending on your environment.

2.1 Eclipse API (Recommended)

Eclipse provides a REST API (.NET Core engine) for data access. This is the recommended approach for modern integrations.

- ☐ Eclipse API provides REST endpoints for Eclipse data
- ☐ Supports GET, INSERT, and UPDATE operations
- ☐ Enforces data validation and business logic
- ☐ Default port is typically 5000
- ☐ API documentation available at http://EclipseServer:Port
- ☐ Session-based authentication (not OAuth2)
- ☐ Requires sessionToken and refreshToken management

Key API Endpoints for Migration

- ☐ Products/Items endpoint
- ☐ Customers endpoint
- ☐ Vendors/Suppliers endpoint
- ☐ Orders endpoint
- ☐ Inventory endpoint
- ☐ Pricing endpoint
- ☐ Contacts endpoint

2.2 CSV Import/Export

Eclipse provides CSV specifications for data import and export, useful for bulk data extraction.

- ☐ Eclipse CSV Import/Export Specifications available
- ☐ Mass Load utility for bulk operations
- ☐ Can export products, customers, pricing, and transactions
- ☐ Windows message-based automation available
- ☐ Excel/CSV file drag-and-drop import capabilities

2.3 Direct UniVerse Access

For advanced extractions, direct UniVerse database access may be required. This requires specialized MultiValue expertise.

- ☐ UniVerse BASIC queries for data extraction
- ☐ RetrieVe query language for data access
- ☐ SQL access via FairCom SQL server or ODBC driver
- ☐ Note: Requires Client/Server version of Eclipse for SQL

- ☐ Consider engaging MultiValue/Pick specialists

2.4 Epicor Data Analytics (EDA)

EDA provides interactive dashboards and can export data from Eclipse:

- ☐ Cloud-based analytics service
- ☐ Pre-built reports and dashboards
- ☐ Data export capabilities
- ☐ Useful for historical data extraction

Need help extracting data from Eclipse UniVerse?

Request an Eclipse Assessment

3. Eclipse Key Data Files and Mapping

Eclipse uses 'files' rather than traditional database tables. Understanding these file structures is essential for accurate data extraction. Note: Eclipse file names and structures may vary by version.

3.1 Product/Inventory Data

Eclipse File/Entity	Description / Key Data Elements
PRODUCT	Product master - item ID, description, product group, UOM
INVENTORY	Inventory by location - quantities, bin locations, rankings
PRODUCT.GROUP	Product categories and classifications
UOM	Unit of measure definitions and conversions
VENDOR.PRODUCT	Vendor/manufacturer part cross-references
PDW Catalog	Product Data Warehouse - extended product attributes

- ☐ Extract product master with all attributes
- ☐ Document product group hierarchy
- ☐ Map UOM conversions (selling, purchasing, inventory units)
- ☐ Export wire/cable cut-to-length configurations
- ☐ Capture IDW (Industry Data Warehouse) attributes if used
- ☐ Document bin location structures

3.2 Customer Data

Eclipse File/Entity	Description / Key Data Elements
CUSTOMER	Customer master - ID, name, credit limit, terms, price class
SHIP.TO	Ship-to addresses linked to customers
CONTACT	Customer contacts - name, email, phone, role
CUSTOMER.CLASS	Customer classifications and pricing assignments
CALLING.QUEUE	Trouble tickets and customer service records

- ☐ Extract customer master with all ship-to addresses
- ☐ Export contacts linked to customers
- ☐ Document customer price classes

- ☐ Capture credit limits and payment terms
- ☐ Export tax exemption data
- ☐ Document customer-specific notes and preferences

3.3 Vendor Data

Eclipse File/Entity	Description / Key Data Elements
VENDOR	Vendor master - ID, name, terms, lead times
VENDOR.ADDRESS	Vendor addresses - remit-to, purchase-from
VENDOR.PRODUCT	Vendor part numbers, costs, minimum orders

- ☐ Extract vendor master with all addresses
- ☐ Export vendor item cross-references with costs
- ☐ Document payment terms by vendor
- ☐ Capture lead times and minimum order quantities
- ☐ Export EDI trading partner configurations

3.4 Pricing Data

Eclipse's pricing engine is highly flexible with matrix pricing, quantity breaks, and customer-specific overrides. This is often the most complex area to migrate.

Eclipse Pricing Component	Description
Price Matrix	Flexible pricing by class, product group, quantity
Customer Price Class	Customer classification determining base pricing
Quantity Breaks	Volume-based pricing tiers
Customer Overrides	Customer-specific pricing exceptions
SPAs / SPJs	Special Pricing Agreements / Special Pricing Jobs
Future Pricing	Scheduled price changes with effective dates

- ☐ Document complete price matrix structure
- ☐ Extract all customer price class assignments
- ☐ Export quantity break tiers
- ☐ Capture all customer-specific overrides
- ☐ Export SPA and SPJ pricing agreements
- ☐ Document future effective pricing
- ☐ Map promotional pricing rules

3.5 Transactional Data

Sales Orders

Eclipse Entity	Description
ORDER	Sales order header and lines
QUOTE	Quotes/estimates pending conversion
PICK.TICKET	Warehouse pick tickets for fulfillment
INVOICE	Sales invoices

- ☐ Extract all open sales orders
- ☐ Include line-level detail with pricing
- ☐ Capture backorder quantities
- ☐ Export job/project linked orders
- ☐ Document special order handling

Purchase Orders and Transfers

Eclipse Entity	Description
PURCHASE.ORDER	Purchase order header and lines
TRANSFER	Inter-branch transfer orders
RECEIVING	Receiving records and in-transit inventory

- ☐ Extract open purchase orders
- ☐ Include expected receipt dates
- ☐ Export in-transit transfer orders
- ☐ Capture partially received quantities

Accounts Receivable

- ☐ Export open invoice balances
- ☐ Include aging detail by customer
- ☐ Capture unapplied cash receipts
- ☐ Document credit memos and debit memos

Accounts Payable

- ☐ Export open voucher balances
- ☐ Include aging detail by vendor
- ☐ Capture pending payments
- ☐ Document prepayments and credits

4. Eclipse-Specific Migration Considerations

4.1 Counter/POS Operations

Eclipse excels at counter sales. Document these workflows for replication:

- ☐ Counter transaction workflows
- ☐ Cash register configurations
- ☐ Will-call staging processes
- ☐ Quick product lookup methods
- ☐ Customer credit checking at counter
- ☐ Payment processing integrations (Vantiv/WorldPay)

4.2 Job Management

Eclipse's Job Management handles commercial lighting and switchgear projects:

- ☐ Active job/project list
- ☐ Job bid information
- ☐ Bill of materials (BOMs) by job
- ☐ Submittal status tracking
- ☐ Release schedules
- ☐ Change order history
- ☐ Job billing milestones
- ☐ Vendor invoice reconciliation by job

4.3 Rebate Programs

Eclipse manages complex rebate programs via EDI. Document completely:

- ☐ Active rebate programs by vendor
- ☐ SPA (Special Pricing Agreement) terms
- ☐ SPJ (Special Pricing Job) configurations
- ☐ Rebate accrual balances
- ☐ Rebate claim history
- ☐ EDI rebate data exchange (typically 867)

4.4 Work Queues

Eclipse's self-populating work queues drive employee tasks:

- ☐ Document active work queue configurations
- ☐ Warehouse in Process Status Queue settings
- ☐ Credit hold queue rules
- ☐ Order exception queues
- ☐ Customer calling queue (trouble ticket) data

4.5 Integration Points

Document all Eclipse integrations that must be recreated:

- ☐ EDI connections (850, 810, 856, 867, etc.)
- ☐ Epicor Commerce Connect (ECC) eCommerce
- ☐ Eclipse Mobile configurations
- ☐ Proof of Delivery / Signature Capture
- ☐ Document Imaging
- ☐ RF Warehousing devices
- ☐ Barcode label printing
- ☐ VsiFax email/fax integration
- ☐ Credit card processing (Vantiv)
- ☐ AutoOrder inbound PO processing
- ☐ Automated Backup Service (ABS)

Get expert guidance on Eclipse-specific migration

Schedule a Consultation

5. Eclipse Data Quality Assessment

Eclipse installations accumulate data quality issues over years of operation. Assess and cleanse before migration.

5.1 Common Eclipse Data Issues

- ☐ Duplicate product records from acquisitions
- ☐ Inconsistent product descriptions
- ☐ Obsolete products still marked active
- ☐ Duplicate customer records
- ☐ Outdated contact information
- ☐ Inactive ship-to addresses still in use
- ☐ Expired price agreements still active
- ☐ Orphaned records from deleted masters
- ☐ Inconsistent UOM configurations

5.2 Data Validation Checklist

- ☐ Validate product counts match inventory reports
- ☐ Reconcile customer counts with AR aging
- ☐ Verify pricing for sample customers matches Eclipse
- ☐ Confirm inventory quantities by location
- ☐ Check open order counts and values
- ☐ Validate AR/AP balances to GL

5.3 Branch-Specific Considerations

Eclipse supports multi-branch operations. Each branch may have unique configurations:

- ☐ Document branch-specific product assortments
- ☐ Capture branch-specific pricing variations
- ☐ Map branch inventory locations and bins
- ☐ Document inter-branch transfer rules
- ☐ Capture branch-level financial settings

6. Migration Execution Checklist

6.1 Pre-Migration Preparation

- ☐ Complete Eclipse environment documentation
- ☐ Establish API access and credentials
- ☐ Identify extraction window (off-peak hours)
- ☐ Set up test extraction processes
- ☐ Validate extraction record counts against Eclipse reports
- ☐ Engage MultiValue specialists if needed
- ☐ Document Eclipse report parameters for validation

6.2 Test Migration (Recommended 3+ Iterations)

- ☐ First iteration: Master data only
  - ☐ Products/inventory
  - ☐ Customers and contacts
  - ☐ Vendors
- ☐ Validate record counts and key fields
- ☐ Second iteration: Add pricing data
- ☐ Verify pricing calculations match Eclipse
- ☐ Third iteration: Add open transactions
- ☐ Validate order totals and balances
- ☐ Document and resolve all discrepancies
- ☐ Refine extraction processes based on findings

6.3 Final Data Migration

- ☐ Freeze Eclipse transactions at cutover time
- ☐ Complete final inventory count
- ☐ Extract final master data via API/export
- ☐ Extract final open transactions
- ☐ Extract final financial balances
- ☐ Load data to new system
- ☐ Validate record counts
- ☐ Validate financial balances
- ☐ Test critical transactions
- ☐ Obtain sign-off from key users

6.4 Post-Migration Validation

- ☐ Compare product counts: Eclipse vs. new system
- ☐ Compare customer counts and AR balances
- ☐ Compare vendor counts and AP balances
- ☐ Validate inventory quantities and values
- ☐ Test pricing for sample customers/products
- ☐ Process test orders end-to-end
- ☐ Verify integration connections
- ☐ Test counter/POS workflows
- ☐ Validate job management functions
- ☐ Confirm reporting accuracy

7. Historical Data Considerations

7.1 What Historical Data to Migrate

Eclipse does not automatically purge data, so historical data is readily available. Determine scope:

Typically Required:

- ☐ Sales history (typically 2-5 years for forecasting)
- ☐ Customer purchase history (for sales analysis)
- ☐ Vendor purchase history (for negotiation)
- ☐ Rebate claim history
- ☐ Job/project history for warranty purposes

Optional (Consider Cost vs. Benefit):

- ☐ Complete invoice history
- ☐ Payment history
- ☐ Quote/estimate history
- ☐ Return/RMA history
- ☐ Calling queue ticket history

Typically Not Migrated:

- ☐ Closed orders older than retention period
- ☐ Completed job detail (summarize instead)
- ☐ Archived document images (maintain separate access)

8. Common Eclipse Migration Pitfalls

Avoid these common issues encountered during Eclipse migrations:

8.1 Technical Pitfalls

- ☐ Underestimating UniVerse database complexity
- ☐ Not engaging MultiValue/Pick expertise when needed
- ☐ Extracting during peak business hours
- ☐ Missing dynamic array data structures
- ☐ Not accounting for Eclipse-specific data formats
- ☐ Overlooking branch-specific configurations

8.2 Pricing Migration Pitfalls

- ☐ Not understanding Eclipse's flexible price matrix
- ☐ Missing customer-specific pricing exceptions
- ☐ Overlooking quantity break pricing
- ☐ Not migrating SPA/SPJ agreements
- ☐ Losing future effective pricing
- ☐ Missing promotional pricing rules

8.3 Functional Pitfalls

- ☐ Not replicating counter/POS workflows
- ☐ Losing work queue automation
- ☐ Missing job management complexity
- ☐ Overlooking rebate program details
- ☐ Not testing cut-to-length operations
- ☐ Losing EDI configurations

8.4 Process Pitfalls

- ☐ Insufficient user acceptance testing
- ☐ Not validating pricing with actual Eclipse quotes
- ☐ Skipping parallel operations period
- ☐ Not training users on workflow differences
- ☐ Rushing cutover without adequate validation
- ☐ Underestimating counter staff retraining needs

9. Industry-Specific Considerations

9.1 Electrical Distribution

- ☐ IDW (Industry Data Warehouse) attribute migration
- ☐ Wire and cable reel tracking and cut-to-length
- ☐ Commercial lighting job management
- ☐ Switchgear project handling
- ☐ SPA pricing with major manufacturers
- ☐ NAED/AD/IMARK buying group connections

9.2 HVAC Distribution

- ☐ Equipment serial number tracking
- ☐ Contractor warranty registration
- ☐ Seasonal inventory planning data
- ☐ Installation job staging
- ☐ Returns/exchange handling

9.3 Plumbing & PVF Distribution

- ☐ Pipe cut-to-length configurations
- ☐ Valve and fitting specifications
- ☐ Job takeoff/estimating data
- ☐ Showroom/quoting operations
- ☐ Room delivery functionality

Ready to migrate from Epicor Eclipse?

Request a Migration Assessment

Need Help With Your Eclipse Migration?

Ximple Solutions specializes in cloud ERP migrations for wholesale distributors, including Epicor Eclipse transitions for electrical, HVAC, plumbing, and PVF distributors.

Our team has deep expertise in Eclipse's UniVerse database architecture and can help ensure a smooth transition to modern cloud ERP.

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