



# EleVia A/R Management & Collections for Deltek Vantagepoint®

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**Smarter A/R. Faster Collections.  
Stronger Relationships.**



A/R Management  
& Collections

[eleviasoftware.com](http://eleviasoftware.com)

# Feature Overview

## What if you could automate your Collections process to make it easier, faster and more effective?

You can with EleVia A/R Management & Collections. Our add-on software for Deltek Vantagepoint lets you set up custom Collections processes and templates, notifies employees involved and makes it easy to track your performance:



The software pulls Client, Project and Accounts data directly from Deltek Vantagepoint.



You set up varied collections processes, based on A/R strategies or client segments.



You set up templates to standardize and speed your collections communications, including statements.



Designated employees are notified via email when they have a scheduled action item.



A metrics dashboard makes it easy to track KPIs, such as Days Sales Outstanding (DSO) and Weighted Average Days Late (WADL).



Invoice directly from Vantagepoint by turning on the optional EVpay add-on



Customer receives an email with the invoice and a "PAY NOW" link – everything is automatically recorded and reconciled within Deltek



 **EVPay**  
Automate ACH  
Payments

## Value Proposition

### Why choose EleVia Software? To get more value from your Vantagepoint investment.


EleVia Software develops, delivers and supports software to extend the value of your Deltek Vantagepoint investment. EleVia A/R Management & Collections is one of our core financial products. Leading architecture and engineering firms use it to reduce aged receivables and improve cash flow.



# ELEVIA

Software Products

 **EI**  
Electronic Invoicing  
(Optional EYPay add-on)

 **ARM**  
A/R Management & Collections  
(Optional EYPay add-on)

 **PAT**  
Payables Approval  
& Tracking

 **FSS**  
Field Services Suite

Functionality	Vantagepoint	EleVia
Automated collection workflows		✓
Customizable email templates	✓ (Limited)	✓
Performance dashboards and KPIs		✓
Integrates with payment processing link	✓	✓ (EYPay)
Automated internal alerts & notifications		✓
Audit trail and reporting		✓
Dashboards are configurable based on any fields in Deltek		✓
Statements	✓ (Limited)	✓
Configurable client alerts & notifications		✓

## A/R Management & Collections - Processes Grid

The screenshot displays the A/R Management & Collections - Processes Grid interface. The main menu on the left includes options like View, Dashboard, My Actions, Processes, Utilities, Batch Load Invoices, Client Invoice Reminders, Client Statements, Key Convert, Reverse Ignored Invoices, Help About..., Templates, Email Templates, PDF Templates, Word Templates, Process Templates, and Configuration. The main grid shows a list of processes with columns for Process, Status, Proactive Process?, Process Owner, Billing Client Name, Invoice Balance, and Max Days Old. A detailed view of a process (Sands, Ltd. 020005001 Venetian Casino Resort - SD Standard) is shown below the grid, including a table of invoices and a comments grid. A callout box shows an email template for invoice 52831, which includes a subject line, a greeting, a request for payment, and a table of invoice details.

Invoice	Project	Invoice Date	Invoice Amount	Invoice Balance
52831	Venetian Casino Resort - SD	9/23/2024	2,220.00	2,220.00
53020	Venetian Casino Resort - SD	10/23/2024	6.00	6.00
<b>Total:</b>			<b>2,226.00</b>	<b>2,226.00</b>

- 1 List the collections process workflow
- 2 Create templates to standardize collections efforts
- 3 Send client invoice reminders and client statements
- 4 Load past due invoices from Deltek
- 5 Three main views
- 6 Lists outstanding invoices in a collections process
- 7 Indicates collections process
- 8 Note who promised to pay and when
- 9 Select the lightning bolt to create an email for the client with PDFs of invoices attached
- 10 History of all collections efforts

## A/R Management & Collections – Custom Template and Process Creation

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Process Name Per Client	Process Name Per Client Per PM	Process Name Per Project	Process Name Per Invoice	Process Name Per	Status	Proactive Template?	Duplicat When N
[BillingCL Name] - Invoice Reminder	[BillingCL Name] [PR.ProjMgr] Invoice Reminder	[BillingCL Name] [PR.WBS1] [PR.Name] Invoice Re...	[BillingCL Name] [PR.WBS1] [Invoice] Invoice Reminder		Active	Yes	
[BillingCL Name] - Standard	[BillingCL Name] [PR.ProjMgr] Standard	[BillingCL Name] [PR.WBS1] [PR.Name] Standard	[BillingCL Name] [PR.WBS1] [Invoice] Standard		Active	No	
[BillingCL Name] - High Risk	[BillingCL Name] [PR.ProjMgr] High Risk	[BillingCL Name] [PR.WBS1] High Risk	[BillingCL Name] [PR.WBS1] [Invoice] High Risk		Active	No	Yes

Collection Template: Standard

Grid

Type	Action	Employee	Contact	Status	Action Template	Days After Previous Action	Status Change Roles
Email	[EM.FirstName] [EM.LastName] 2 week Email [Contacts.FirstName] [Contacts.LastName]	Project Manager	ARM Collections Contact (Deltek UDF)	Scheduled	Invoice Due	15	Acc
Email	[EM.FirstName] [EM.LastName] 30 day Email [Contacts.FirstName] [Contacts.LastName]	Principal-in-Charge	ARM Collections Contact (Deltek UDF)	Scheduled	Invoice Due	15	Acc
Email	[EM.FirstName] [EM.LastName] 60 day Email [Contacts.FirstName] [Contacts.LastName]	Supervisor	Billing Contact	Scheduled	Invoice Due - 60	30	Acc
Email	[EM.FirstName] [EM.LastName] 90 day Email [Contacts.FirstName] [Contacts.LastName]	Process Owner	Billing Contact	Scheduled	Invoice Due - 90	30	Acc
Email	[EM.FirstName] [EM.LastName] 120 day Email [Contacts.FirstName] [Contacts.LastName]	Process Owner	Billing Contact	Scheduled	Invoice Due - 120	30	Acc
Email	[EM.FirstName] [EM.LastName] 180 day Email [Contacts.FirstName] [Contacts.LastName]	Process Owner	ARM Collections Contact (Deltek UDF)	Scheduled	Invoice Due - 180	30	Acc
Task	Send to Collections	Process Owner		Open		28	

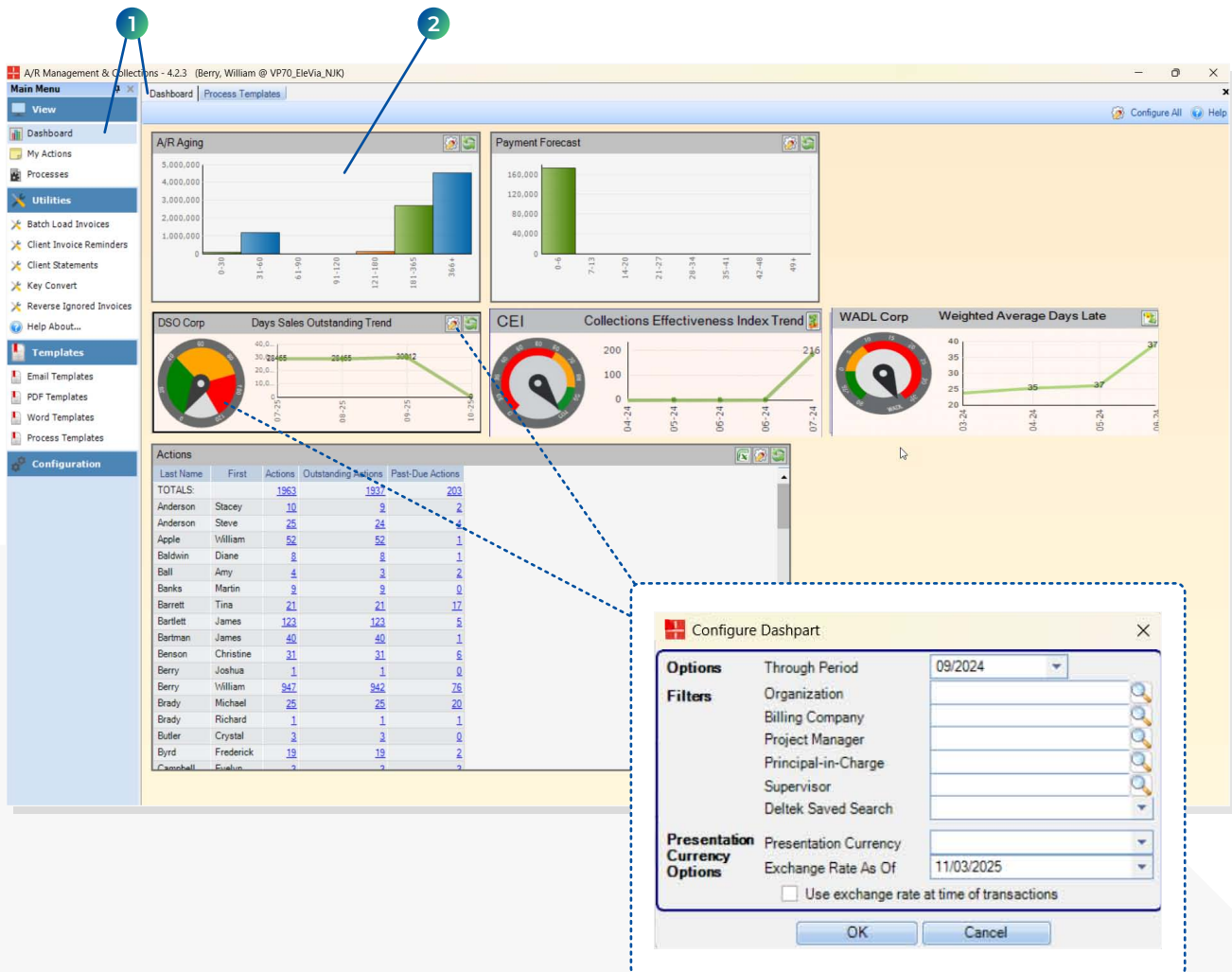
2

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- 1 Create custom processes and display in user-defined order
- 2 Assign task to employees by name or title category
- 3 Add email, Word or PDF templates using your own verbiage



## A/R Management & Collections – Metrics Dashboard



- 1 Displays key collections metrics
- 2 Select graph element to drill down