



EleVia Electronic Invoicing for Deltek Vantagepoint®

Automate the Invoice Review Process
to Save Time and Speed Billings



Electronic Invoicing

eleviasoftware.com

Feature Overview

What if you could automate your time-consuming manual invoicing process?



Client, Project and Accounts data are pulled directly from Deltek Vantagepoint.



Project Managers can review and mark-up invoices online — even remotely.



Accounting gains visibility into the status of invoices at all times.



Accounting can automatically create and email Final Invoice Packages to clients with cover letters, supporting documents and progress reports.



Authorized users can quickly review Billing History at any time.



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 reconciles 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 that extends the value of your Deltek Vantagepoint ERP investment.

Our flagship product, Electronic Invoicing, has been in use since 2009 and is trusted by more than 150 architecture and engineering firms.



ELEVIA

Software Products



Electronic Invoicing
(Optional EVPay add-on)



A/R Management & Collections
(Optional EVPay add-on)



Payables Approval
& Tracking



Field Services Suite

| Functionality | Vantagepoint | EleVia |
|--|-----------------------------|--|
| Real Time Dashboards | ✓ | ✓ |
| Draft Markups | ✓ | ✓ (History Tracking) |
| Interactive Billing for PMs (Write-offs, holds, transfers) | ✓ | ✓ (Additional approval controls can be configured) |
| Invoice Routing | ✓ | ✓ (Parallel, Phase & Task) |
| Delegation | ✓ | ✓ (By Billing Client and/or Project) |
| Business logic configuration for invoice approvals | | ✓ |
| Visibility and Transparency of the Entire Invoice Review process | | ✓ |
| Billing History audit trail | | ✓ |
| Final Invoice Package automatically assembles required documentation for Final Invoice | | ✓ |
| Payment Link processing (ACH and Credit Card) | ✓ | ✓ (Unposted Cash Receipt files created with EVPay) |
| Automated Notifications and Reminders | ✓ | ✓ (Escalation Notification) |
| Dashboards are configurable based on any field in Deltek | | ✓ |
| Electronic payment link included in invoice | ✓ (Optional Integration) | ✓ (EVPay – Optional Integration) |

Electronic Invoicing Main Grid

The screenshot displays the 'Electronic Invoicing Main Grid' interface. It features a top navigation bar with tabs like 'Grid', 'Invoice Group (New)', 'Quick Load', 'Reviewer', 'Reviewer', 'Principal', 'PM', 'Principal', 'BT Notes', 'Status', 'BT Notes', 'Stage Flow', 'Draft', 'Update', 'Reason Not Invo', 'Invoice Comment', 'Invoice Des a', 'Contract', 'JTD Billed', 'Contract Remaining', 'JTD Unbilled', 'Current Spent', 'JTD Spent', 'Total AR', and 'Days @ Stage'. The main grid shows a list of projects with columns for Project, Invoice Stage, Reviewer, PM, Principal, BT Notes, Status, BT Notes, Stage Flow, Draft, Update, Reason Not Invo, Invoice Comment, Invoice Des a, Contract, JTD Billed, Contract Remaining, JTD Unbilled, Current Spent, JTD Spent, Total AR, and Days @ Stage. A 'Total Contract' pop-up window is visible, showing a table with columns for Contract, Amount, and Y. The bottom left shows a PDF toolbar with a 'draft' watermark. The bottom right shows an 'Unbilled Detail and Aging' window with a table of unbilled items.

- 1 Use + sign to see data at the lower of the Project
- 2 Select folder to see previous invoices and markups
- 3 Standard PDF toolbar to mark-up draft
- 4 Invoice Stage Change
- 5 History of Project
- 6 Create and email Final Invoice Package with cover letters, supporting documents and/or progress reports
- 7 Add supporting docs that will attach the Final Invoice Packaging
- 8 Icon for our ARM Module
- 9 Select folder to see actual receipts from A/P or employees expense reports
- 10 Pop-out window
- 11 Filter Columns
- 12 Budget/Contract Information with hyperlinks to drill down
- 13 Select to open and close bottom window

Electronic Invoicing – Percent Complete

The screenshot displays the EleVia software interface for creating an invoice. The main window is titled 'Invoice Group (New)' and contains a grid of project data. A callout '1' points to the '% Complete' column header. A second callout '2' points to the 'Overall Percent Complete' field in the 'Billing Terms' dialog box. A third callout '3' points to the 'Save to Vantagepoint' button in the same dialog. The dialog also shows a 'Fee Method' of 'Lump sum' and a 'Fee' of '\$1,000.00'. The background shows a preview of the invoice, including the 'eleVIA software' logo and project details for 'Adelphi Research Lab'.

- 1 Update % Complete
- 2 Project Managers mark-up Percent Complete or Lump Sum amounts
- 3 Accounting can update Billing Terms from Project Manager's percent changes without re-entry



Electronic Invoicing with Optional Transactions Add-In

The screenshot displays the EleVia software interface for managing labor transactions. A 'Billing Labor Transfer' dialog box is open, allowing users to transfer time between projects and tasks. The background shows a grid of labor transactions with columns for Project, Task, Employee, Hours, Rate, and various status flags. Numbered callouts highlight the following features:

- 1: View Labor, Expenses and Units
- 2: Project Manager's can transfer, hold or write-off charges
- 3: Can require a comment for time being held or written off
- 4: Can move time between Projects and Phases/Tasks
- 5: Project Manager's can see total billable as they make changes
- 6: Optional feature - Transactions
- 7: Project Manager's can submit their time to Accounting
- 8: Edit Timesheets Comments
- 9: Select icon to see Audit Trail

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