Viewing the Pinnacle Bill Report for Specific Chartfield Account

- 1) Navigate to the UNT Pinnacle Site: <u>https://pinnacle.calero.com/unt</u>
 - a. Enter the UNT EUID in the User Name Field.
 - b. Enter the Password in the Password Field.



2) Upon Logging In, the user will be presented with a Home Page screen.

UNT SYSTEM IT Shared Services		Account Manager 🔻
JOHN MORGAN3	Menu: ROLES	Accounts Reports Home Logou

- 3) Near the top right of the browser window will be a drop down Selection box which identifies the Role the user is currently working from.
 - a. Select the 'Roles' drop down menu to view all available Roles and select the 'Acct. Manager' Role from the list.
 - b. If the 'Acct. Manager' Role is not an available selection from the 'Roles' drop down menu, contact Telecom Support at <u>Telecom.Support@untsystem.edu</u> for further assistance.



- 4) After selecting the User Role, the browser will show options specific to the 'Acct. Manager' Role
 - a. Click on the 'Accounts' Menu Bar near the top right section of the browser window.

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Home		
Home My Contact	Information My Settings	

5) After the browser refreshes, select the 'Account Billing' Tab on the Left hand Side Tab section of the browser window.

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6) Pinnacle will refresh to display the 'Account Billing' section.

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Account Billing Saved Search All Clear Manage Save				
Quick Search				
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ENTER SEARCH CRITERIA AND CLICK SEARCH				

7) Click the 'Search' button to show all Bill Reports for accounts that are assigned to the logged-in user.



- 8) The Search Results may be limited to highlight only a certain sub-section of results. The following additional criteria can be entered in the available fields to refine the search results:
 - a. **Account Number** Partial or Complete Chartfield Strings can be entered into the 'Account Number' Search Field to limit the search results to only one specific account assigned to the logged-in user.

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1 - 5			Rows Per Page 250			
	Billing Date -	Account Number	Account Name	Amount		
	01-SEP-2017	925001-200-830038-550	ITSS - Telecommunication Services + Designated Operating-Managed + Designated Tuition - Roll Fwd	7,195.53		
	01-AUG-2017	925001-200-830038-550	ITSS - Telecommunication Services + Designated Operating-Managed + Designated Tuition - Roll Fwd	7,273.48		
	01-JUL-2017	925001-200-830038-550	ITSS - Telecommunication Services + Designated Operating-Managed + Designated Tuition - Roll Fwd	7,106.98		
	01-JUN-2017	925001-200-830038-550	ITSS - Telecommunication Services + Designated Operating-Managed + Designated Tuition - Roll Fwd	7,275.57		
	01-MAY-2017	925001-200-830038-550	ITSS - Telecommunication Services + Designated Operating-Managed + Designated Tuition - Roll Fwd	7,155.89		
1-5						

- i. **NOTE:** In Pinnacle, the % sign can be used as a wildcard for search.
- b. **Billing Date** Search results can be limited by time period by selecting the desired start date and end dates within the 'Billing Date' fields.

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01-JUN-2017 925001-200-830038-550	ITSS - Telecommunica	38	24	25	26	27	28	29	30	Designated
D1-MAY-2017 925001-200-830038-550	ITSS - Telecommunica				Select	date				Designated

- 9) Once the desired Chartfield Strings and Billing Date are identified, click the underlined Date within the Billing Date column of the search results to view details of the Bill Report.
 - a. **NOTE:** The Bill Date in Pinnacle denotes the prior Bill Month. 01-SEP-2017 = August 2017 Bill Report.

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Billing Date - Account Number	Account Name	Amount
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<u>01-JUL-2017</u> 925001-200-830038-550	ITSS - Telecommunication Services + Designated Operating-Managed + Designated Tuition - Roll Fwd	7,106.98
D1-JUN-2017 925001-200-830038-550	ITSS - Telecommunication Services + Designated Operating-Managed + Designated Tuition - Roll Fwd	7,275.57
01-MAY-2017 925001-200-830038-550	ITSS - Telecommunication Services + Designated Operating-Managed + Designated Tuition - Roll Fwd	7,155.89

10) After Pinnacle loads the Account Summary Bill Detail for the selected Account Billing Report, click the 'View Report' button to open a PDF copy of the Account Billing Bill Report for the selected Billing Date.

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11) A new window will open and the selected Bill Report PDF will load in the pop-up browser window.

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Totals Total Amount Total R 7.195.53	506 17		PINNACLE Account E SYSTEM: T Shared Services Service Lifecycle Management 19-Sep-2017 12:46.38 ACCOUNT: 925001-200-830038-550 IfSS - Telecommunication Services + Designated BILLING DATE: 01-Sep-2017	3ill pm

12) The Bill Report can be reviewed within the web browser or a copy of the document can be downloaded and saved by the user to a local computer or shared drive by selecting the download option from the gray menu bar at the top of the PDF document within the browser window.

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13) If there are any questions while reviewing a Pinnacle Bill Report for the Telecom Monthly Bill, please contact <u>Telecom.Support@untsystem.edu</u> for assistance.