Viewing the Pinnacle Bill Report for Specific Chartfield Account

1) Navigate to the UNT Pinnacle Site: https://pinnacle.calero.com/unt
   a. Enter the UNT EUID in the User Name Field.
   b. Enter the Password in the Password Field.
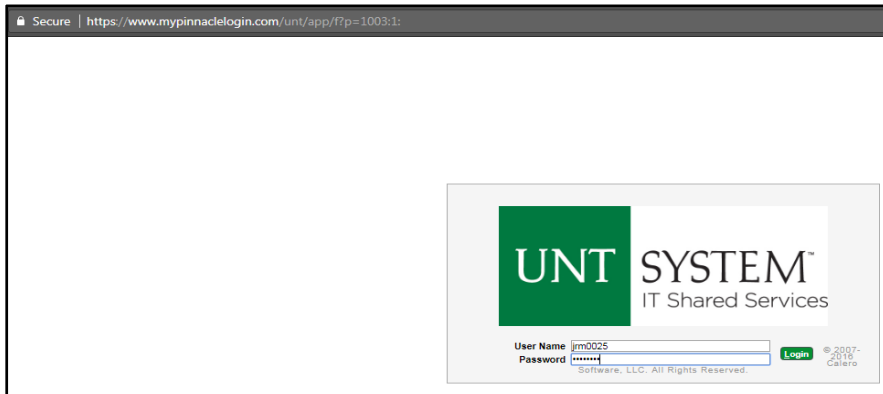
2) Upon Logging In, the user will be presented with a Home Page screen.
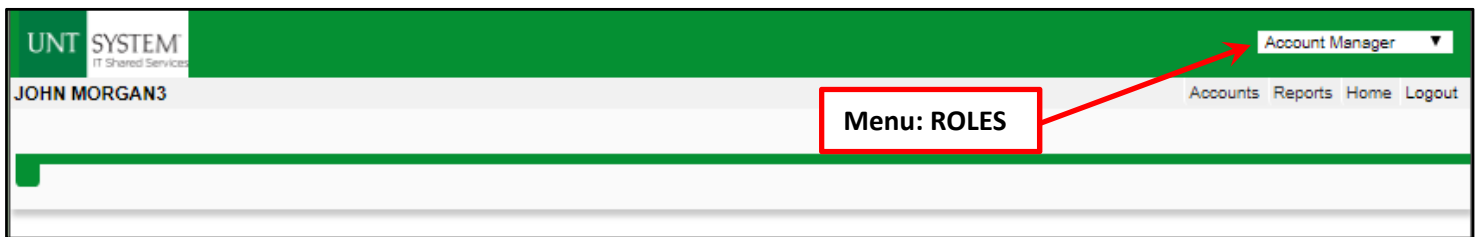
3) Near the top right of the browser window will be a drop down Selection box which identifies the Role the user is currently working from.
   a. Select the 'Roles' drop down menu to view all available Roles and select the 'Acct. Manager' Role from the list.
   b. If the 'Acct. Manager' Role is not an available selection from the 'Roles' drop down menu, contact Telecom Support at Telecom.Support@untsystem.edu for further assistance.
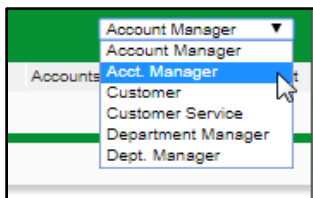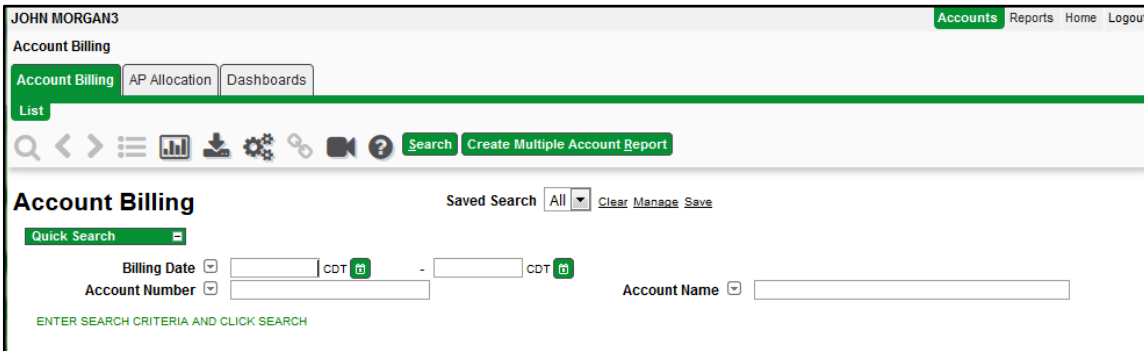

4) After selecting the User Role, the browser will show options specific to the 'Acct. Manager' Role
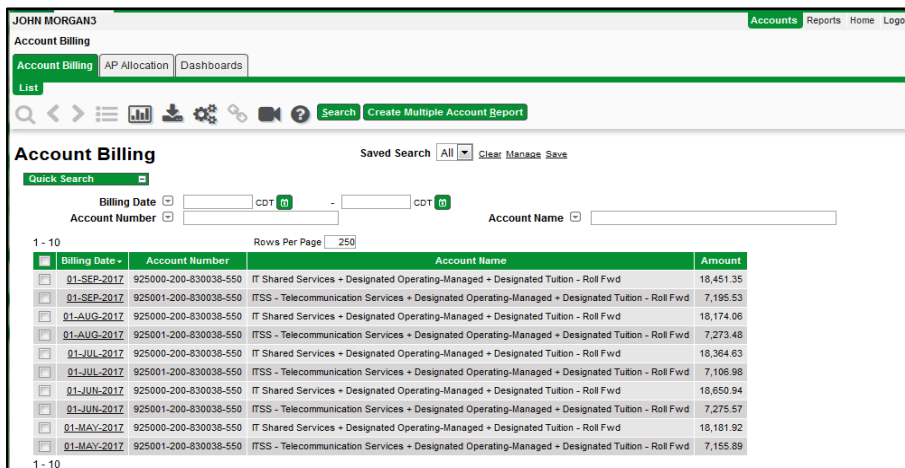   a. Click on the 'Accounts' Menu Bar near the top right section of the browser window.
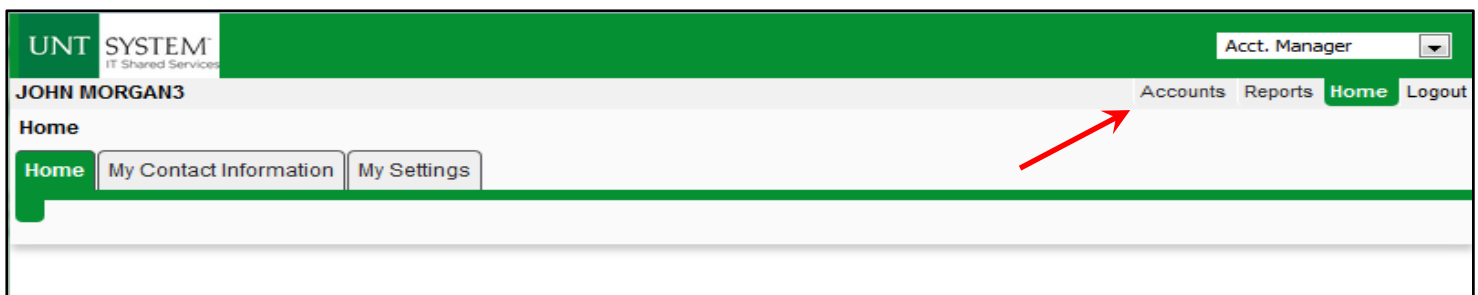
5) After the browser refreshes, select the 'Account Billing' Tab on the Left hand Side Tab section of the browser window.
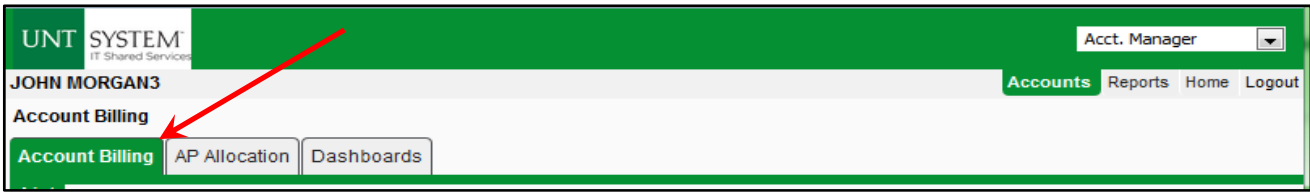
6) Pinnacle will refresh to display the 'Account Billing' section.

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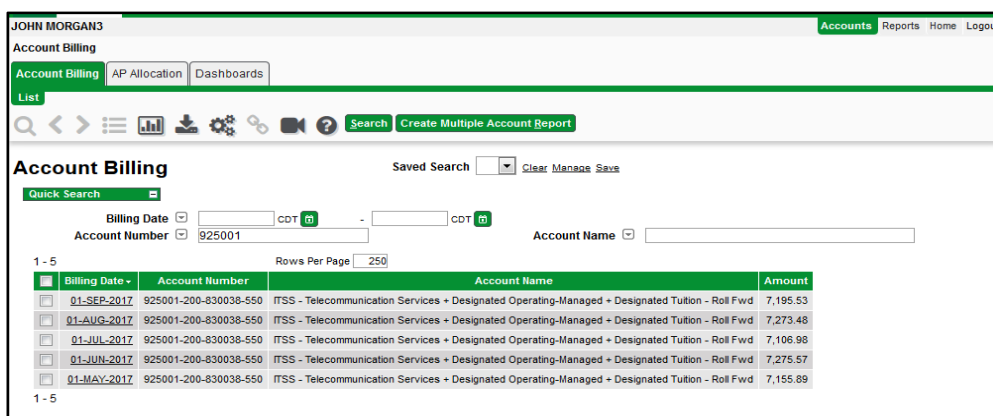
i. **NOTE:** In Pinnacle, the % sign can be used as a wildcard for search.
b. **Billing Date** – Search results can be limited by time period by selecting the desired start date and end dates within the 'Billing Date' fields.
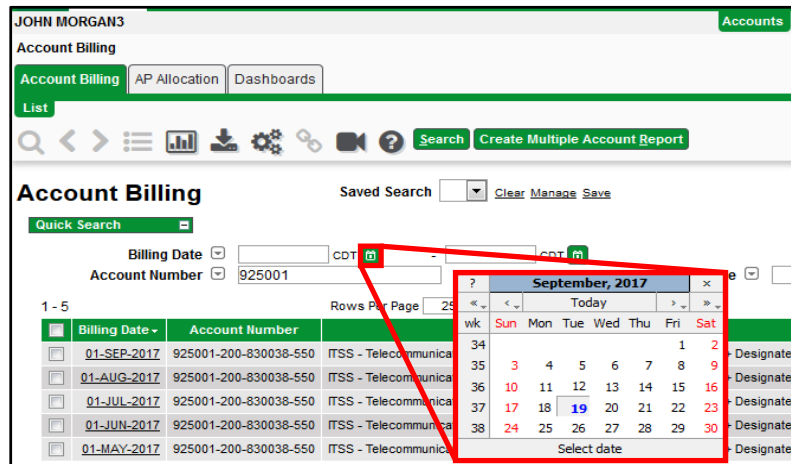

9) Once the desired Chartfield Strings and Billing Date are identified, click the underlined Date within the Billing Date column of the search results to view details of the Bill Report.
   a. **NOTE:** The Bill Date in Pinnacle denotes the prior Bill Month. 01-SEP-2017 = August 2017 Bill Report.
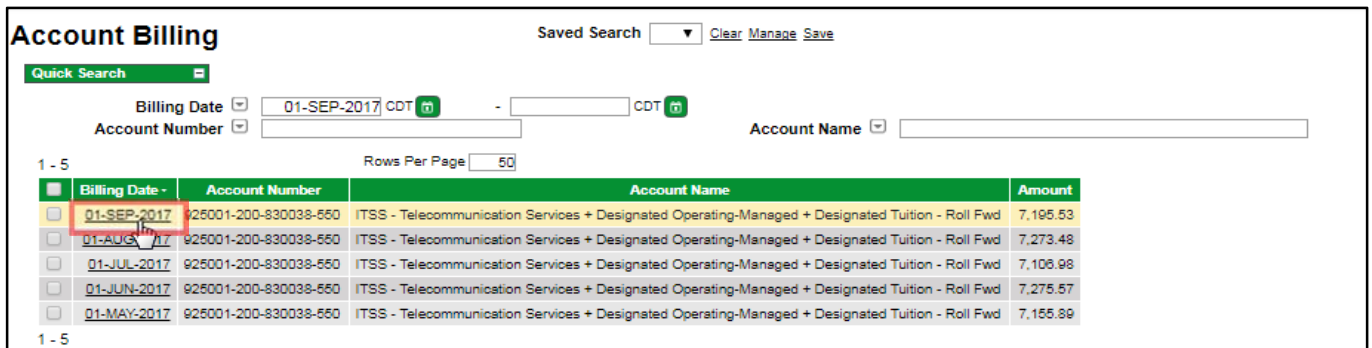
10) After Pinnacle loads the Account Summary Bill Detail for the selected Account Billing Report, click the 'View Report' button to open a PDF copy of the Account Billing Bill Report for the selected Billing Date.
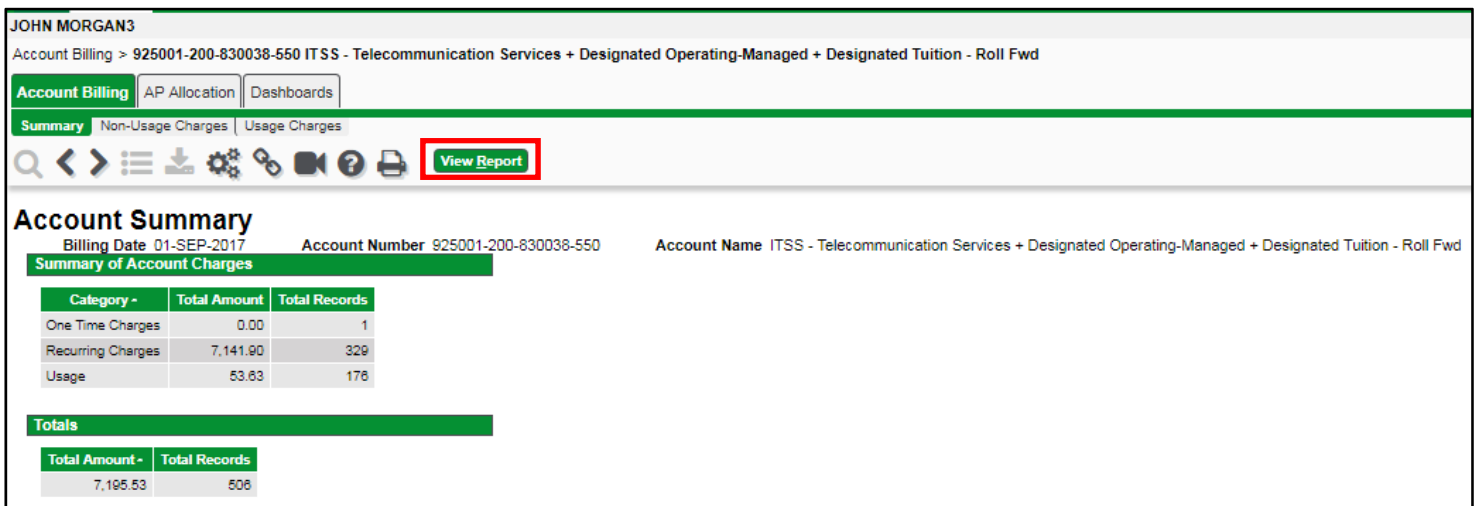
11) A new window will open and the selected Bill Report PDF will load in the pop-up browser window.
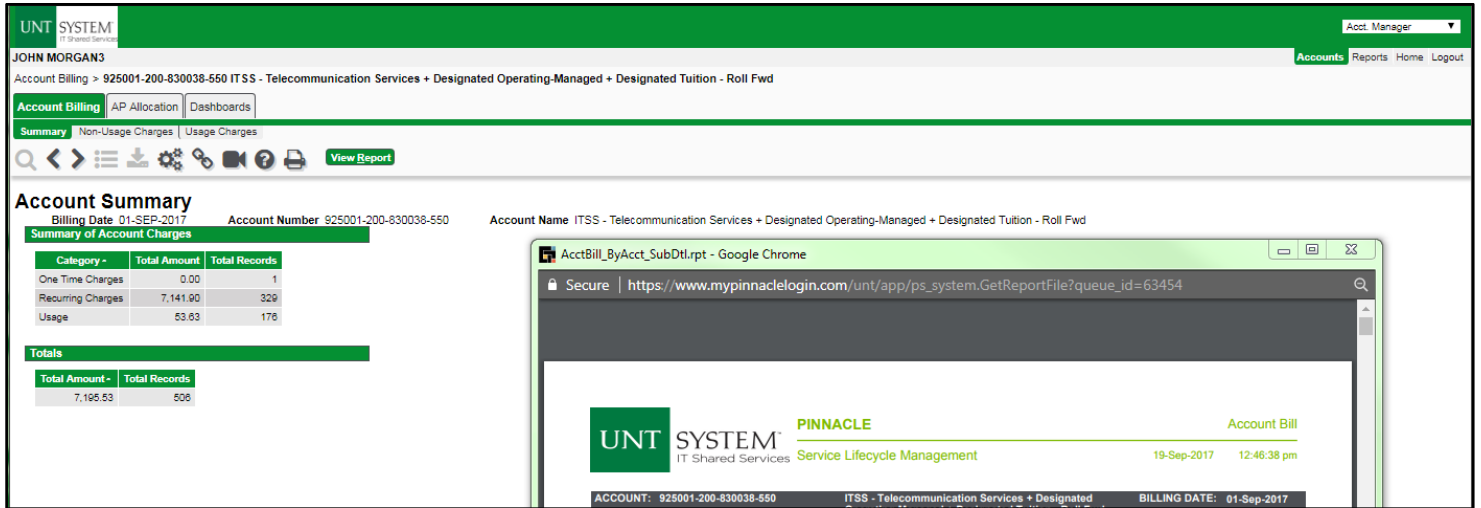
12) The Bill Report can be reviewed within the web browser or a copy of the document can be downloaded and saved by the user to a local computer or shared drive by selecting the download option from the gray menu bar at the top of the PDF document within the browser window.
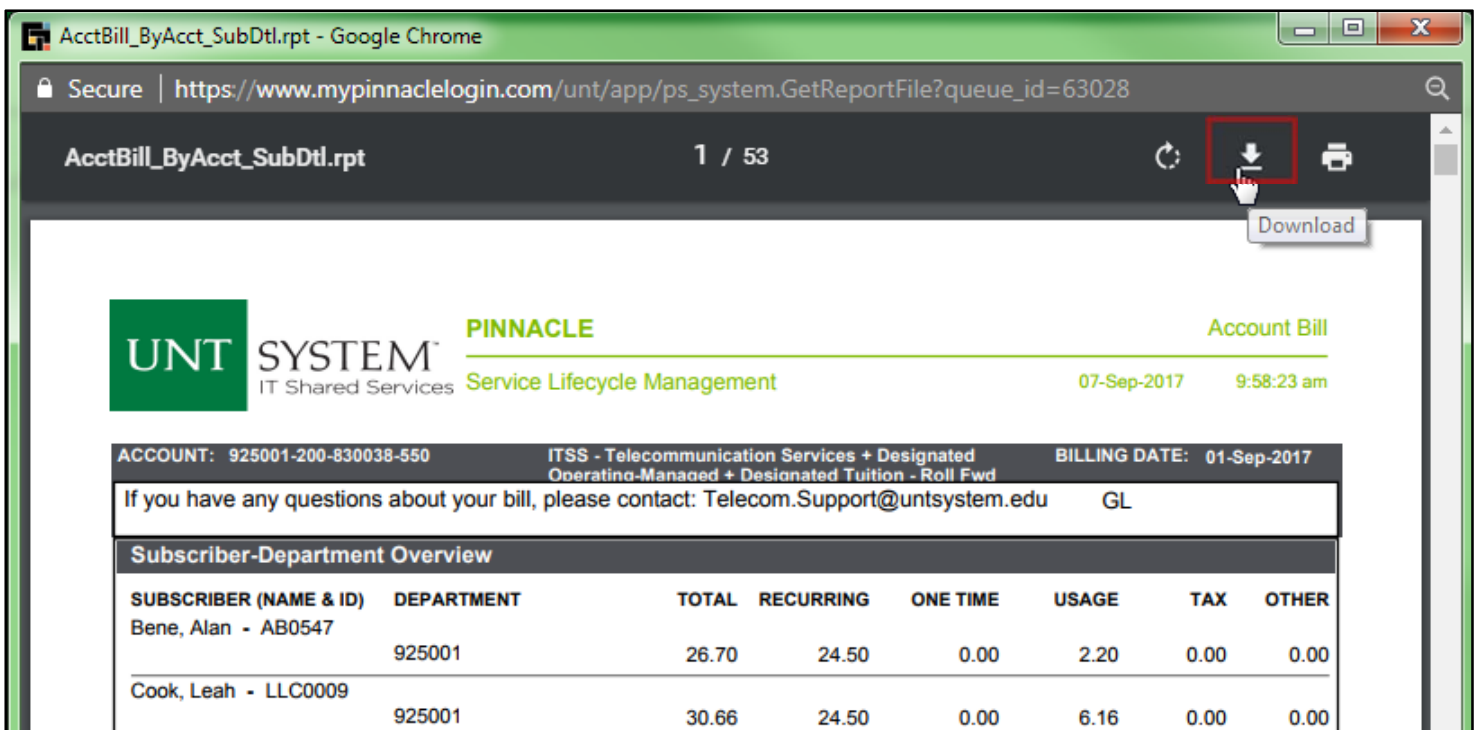
13) If there are any questions while reviewing a Pinnacle Bill Report for the Telecom Monthly Bill, please contact Telecom.Support@untsystem.edu for assistance.