

# What's New in Calero PINNACLE 7.4

## Features & Productivity Enhancements

### Web Server

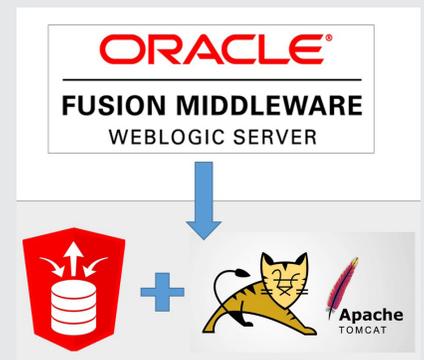
#### Web Tier Replacement - ORDS and Apache Tomcat

Starting in version 7.4, ORDS and Apache Tomcat are required to access your Calero PINNACLE application.

There are many benefits to using ORDS and Apache Tomcat:

- More frequent security updates than Web Tier
  - Apache Tomcat updates security monthly
  - ORDS updates security quarterly
- Less expensive than Web Tier license
  - Apache Tomcat is Open Source, which supports the use of Oracle ORDS (Oracle RESTful Data Services), which is part of standard/enterprise Oracle licensing
  - Does not require additional licensing

After installing ORDS, your system administrator will need to distribute the new URL to end users – this URL must use https and install a signed certificate from a trusted authority.



### ORDS Supports Restful Web Service Integrations

With the introduction of ORDS, version 7.4 introduces several read-only REST web services, with upcoming releases planned to expand to other functions.

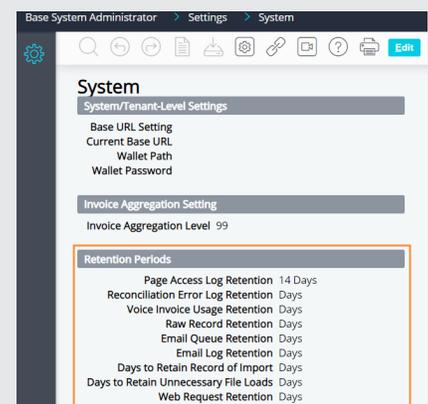
To learn more, download *V74\_PINNACLE REST Services Instructions\_GA* (Solution ID: 190401143144222) from the Knowledge Portal.

### Performance Enhancements

#### Data Retention Settings

New settings have been added that allow sites to better manage the volume of day-to-day data that is generally not needed after a certain period.

To learn more, download *How to Interpret & Use the Setting System Page* [Solution ID: 041806516171985] from the Knowledge Portal.



# Analytics

## Access-Controlled Analytics

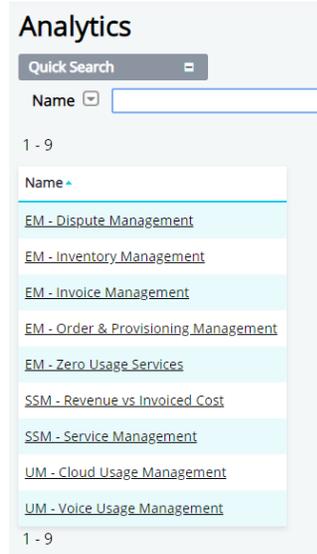
Data-privacy concerns continue to drive many of our enhancements. Beginning in version 7.4, System Administrators have the ability to control information displayed in analytics in many more ways, including the ability to limit by: *Role, User, Menu Item, Filters, Analytics App and Data Type*.

By assigning specific analytic applications to a user, and also by controlling the data available within an analytic, administrators can determine what analytics data an individual user or groups of users can see.

### Basic Procedure:

1. Assign "Analytics" menu to any non-base role
2. Create a filter on that role and assign analytic apps applications ("apps")
3. Assign Users to the filter
4. Restrict Data in Filter with Attributes (Departments and Service Types or Vendor Accounts)

The same analytic will show different data to different users depending on what filters they were assigned.



To learn more about segmenting the analytics applications and data, download *How to Access and Restrict Analytics* (Solution ID: 190419110150294) from the Knowledge Portal.

# Invoice Management

## Short Pay Disputes

Disputes can now be flagged as "Short Paid." This flag tells the "Create Payment" process to ignore any of the invoice items that are flagged as Short Paid when paying the invoice of the disputed items.

The screenshot shows the 'Disputes' application interface. At the top, there is a 'Saved Search' dropdown set to 'All' and a 'Clear Manage' link. Below this is a 'Quick Search' bar. The main area contains a table of disputes. A callout box points to the first row of the table, which is highlighted in orange. The callout box contains the text: 'Dispute # 017 is flagged as Short Paid. Invoice Number 317290139176420170925 will NOT include \$1651.24 when it is paid.'

Dispute Number	Invoice Number	Vendor	Payment Account	Dispute Type	Dispute Subtype	Dispute Category	Short Paid	Dispute Date	Dispute Amount	Amount Won
017	317290139176420170925	AT&T	3172901391764	Disconnected Service	Invoice Item	Invoice Item	✓	05-FEB-2019	1,651.2400	0.0000
018	ANNAINVSHORTPAY	PAETEC	44444	Incorrect Rate	Invoice Item	Invoice Item	✓	05-FEB-2019	175.0000	0.0000
011	123456789	VERIZON	209261	Credit	Invoice Item	Invoice Item		25-AUG-2008	0.0000	0.0000
012	123456789	VERIZON	209261	Disconnected Service	Invoice Item	Invoice Item		25-AUG-2008	0.0000	0.0000

Process:

1. Create a dispute and mark it as "Short Pay"
2. Create payment for invoice, but do NOT pay the "Short Paid" amount
3. Next invoice comes in with a credit on it
4. Match the credit to the dispute
5. Create payment for second invoice

To learn more, download *How to Short Pay Invoices w/o AP Adjustments (v7.4+)* (Solution ID: 190516101959265) from the Knowledge Portal.

## Remit Address Validation

Calero PINNACLE 7.4 adds the ability to identify if the “Remit Address” on an invoice has been updated from the address currently listed on the Payment Account. This new validation process compares the “Vendor Payment Account Remit Address” with the “Invoice Remit Address.”

- **[Blank]** – no address loaded automatically
  - **Needs to Update** – remit address on the invoice does not match the address on the Vendor Payment Account (used for manual process only)
  - **Same** – address loaded is the same as the address on Vendor Payment Account
  - **Updated** – the Vendor Payment Account has been updated with the remit address from the (automatic) invoice load
- If during the automatic load there is no Remit Address on the Vendor Payment Account, it will be added and flagged as “Updated.” If the invoice file is later deleted, the Vendor Payment Account Remit Address will stay tagged as “Updated.”

## Vendor Alias: “Associated Vendor Service ID”

Version 7.4 adds the “Associated Vendor Service ID” – this new field is an attribute of the Vendor-Service relationship and can be used as a secondary vendor identifier of a service. (Primary identifier is the Service Number).

When an invoice is loaded and has a service that is not found via the Service Number field, the new Associated Vendor Service ID field is checked. If found, the invoice item is loaded with the correct PINNACLE Service Number and the vendor’s “Service Number” from the invoice is loaded into the Associated Vendor Service ID field on the invoice item.

If an Associated Vendor Service ID number is entered into a common “Service Number” search field, PINNACLE will search the Service Number AND the Associated Vendor Service ID fields for the result. The returned result will display all records that match on the Service Number or the Associated Vendor Service ID.

To learn more, download *What is the Associated Vendor Service ID? (V7.4+)* [Solution ID: 190325082203919] from the Knowledge Portal.

## UDR Country

Country has been added as an attribute to UDR Source Types. Power Users can determine if this field is “Optional,” “Required,” (when set as Optional or Required, it will appear on the UDR Source) or “Not Applicable.”

Base Power User > Maintenance > Usage > UDR Source Types

**UDR Source Type Profile**

**Code** INVOICEFILE      **Name** Invoice File      **Status**  Active  Inactive

**Description** Represents a file containing usage and/or non-usage charges received from a vendor to be used for reconciliation and/or charge back.

**Switch Attribute**  Required  Optional  Not Applicable

**Carrier Attribute**  Required  Optional  Not Applicable

**Output Directory**  Required  Optional  Not Applicable

**Charge Code**  Required  Optional  Not Applicable

**Country**  Required  Optional  Not Applicable

## About Calero

Calero is a leading global provider of Communications and Cloud Lifecycle Management (CLM) solutions designed to turn insight into action through an intuitive user-interface and visually comprehensive analytics. Calero helps simplify the management of voice, mobile and other unified communications services and assets. With a deep commitment to innovation and customer service, Calero’s CLM approach enables organizations to support the full communications lifecycle, from procurement to payment, including software and services that aid Telecom Expense Management (TEM), Managed Mobility Services (MMS) and Usage Management. Calero has thousands of customers in the United States and more than 50 countries worldwide, including Fortune 2000 corporations, universities and government agencies. Learn more at [www.calero.com](http://www.calero.com).