What's New in Calero PINNACLE 7.5

Features & Productivity Enhancements

Finance Allocation Rollover

Calero PINNACLE 7.5 introduces the ability to replace an existing Finance Allocation with a new one by performing a Finance Allocation Rollover.

This functionality, which operates similarly to an Account Number Rollover, essentially ends the "old" Finance Allocation and replaces it with a new one wherever it occurs across PINNACLE. This utility can be helpful for organizations that replace Finance Allocations on a regular or annual basis.

HOW IT WORKS

First, import updates to the new "Rollover Allocation Code" and "End Date" on an existing finance allocation, or manually enter this information. The "Rollover Allocation Code" must already be an active allocation in PINNACLE.

When the "Execute Rollover" button on the Finance Allocation list page is clicked, PINNACLE initiates the rollover job which will replace the original finance allocation with the rollover finance allocation on different types of records such as Vendor Services, Unpaid Invoice Items, and Vendor Accounts, MRCs or OCCs.

The rollover job will affect any active records in the finance allocation table that meet these criteria:

1. A Rollover Finance Allocation ("Rollover Allocation Code") is assigned
2. Status = Active
3. End Date is < Current Date

To learn more, download How to Setup and Execute Finance Allocation Rollovers (Solution ID: 190903133120056) from the Knowledge Portal.

Invoice History

There is now an "Invoice History" region on the Invoice Profile page. It will capture any status changes made through the API, including any time the Invoice Status changes, the Reconciliation Status changes, or the Payment Status changes. History starts from upgrade point forward.

Contract Rate Audit

Version 7.5 enables the user to set the expected rates for a particular vendor charge at one of three levels. Rates can be specified per:

1. Service Number

2. Service Item (such as Bandwidth)

3. Vendor Account

After Rates are imported into the Contract Rate Audit table, you can "Set All Rates" or just "Set Checked Rates."

The button selection initiates a job that updates active vendor-charge assignment records (that meet the criteria listed in the contract-rate record) to the discount rate specified.

Example:

In the example shown above, all VERIZON vendor services with an active vendor charge code of "FIRMRATE" and Bandwidth of 10 GBPS (Item Value) would be set to an override rate of $3500 (30% x 5000).
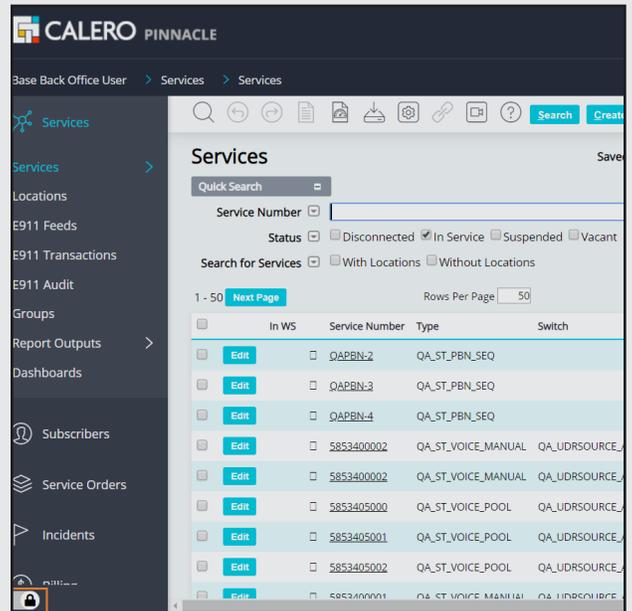
Lock the Menu Option

Version 7.5 adds the ability to "lock" the main menu open by using a toggle at the bottom of the main menu.

Using the Lock/Unlock toggle at the bottom of the menu, you can choose to:

Keep the menu open/expanded (even when you are not actively using it or hovering over it).

Have the menu minimize to only icons when you mouse away from it.

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.