Customer Invoice

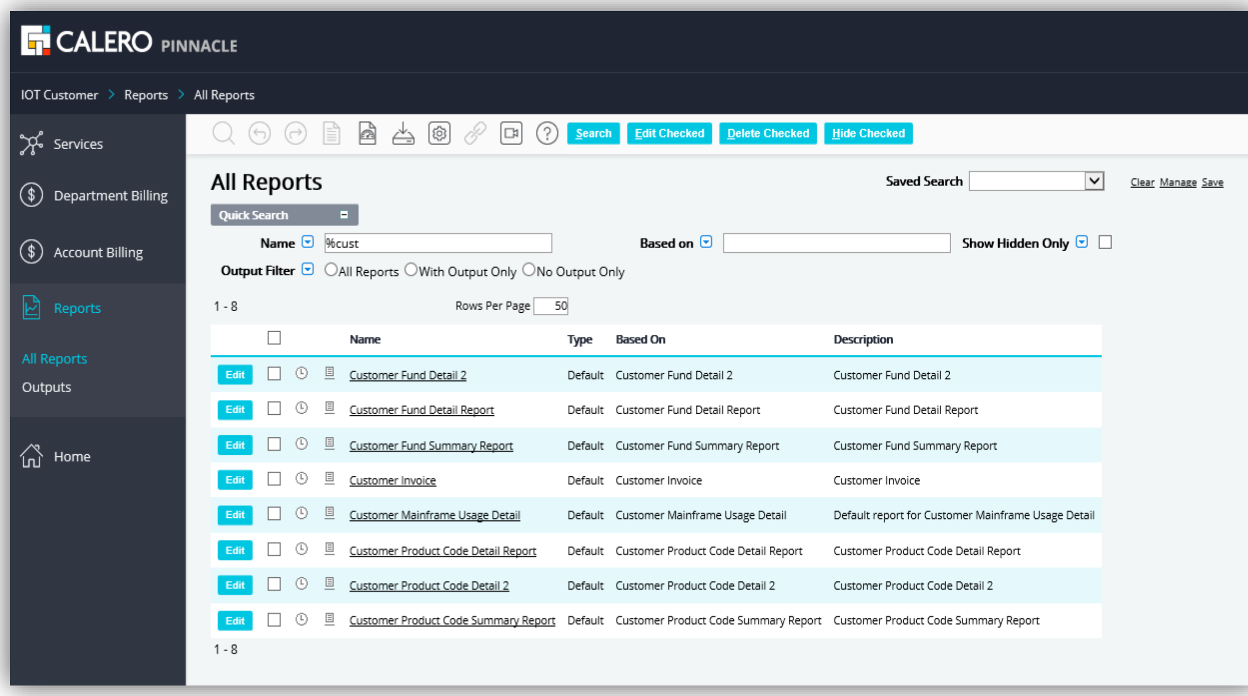
This provides summaries of what you Agency pays IOT for their services

On the left side click the following:

Reports-All Reports

Type the following in Name box:

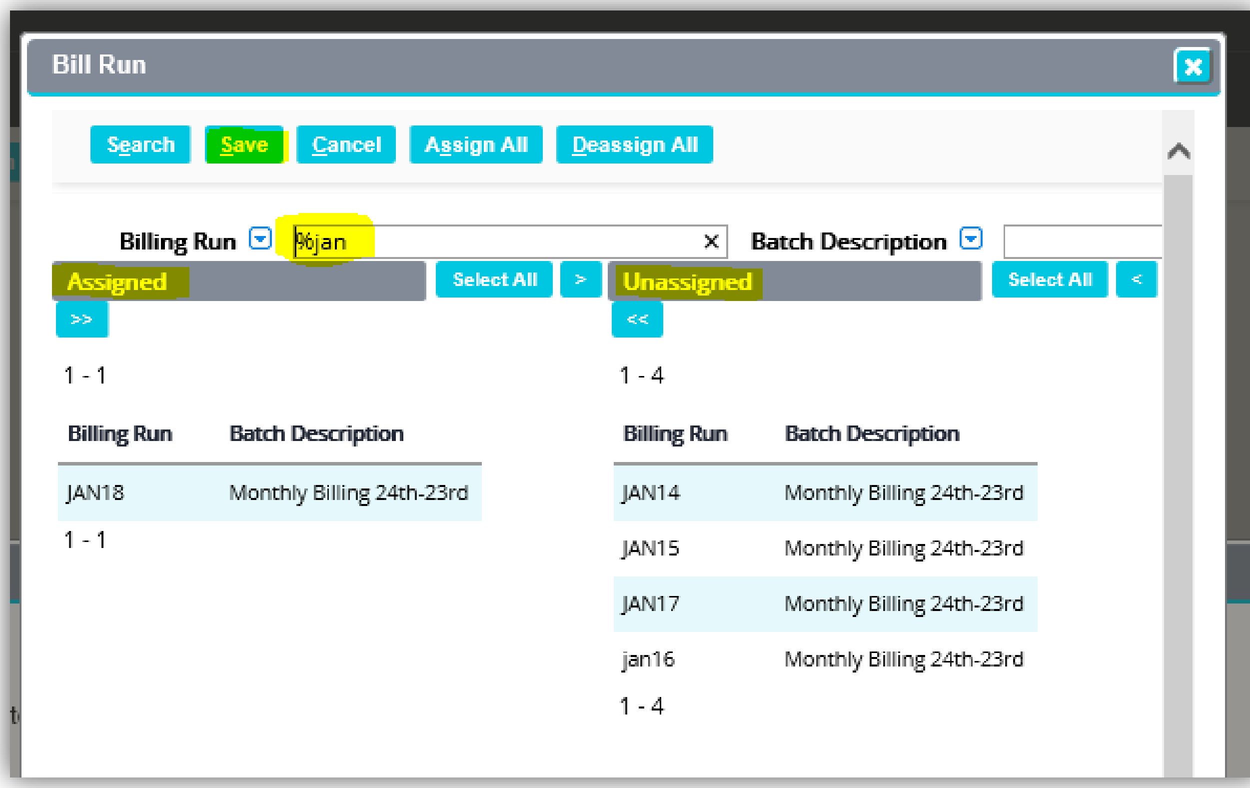
%Cust and click the search button. You should see the following:



Click on Customer Invoice then click run. A pop up box called report parameters will show up.

Anywhere with a red square next to it has to be completed. Click on the Blue Manage Assignments box next to Billing Run. This is where you will tell Pinnacle what month you want to run the invoice for. At the top in the billing run box, enter a % and the first 3 letters of the month you want to run and click search. Put your cursor on the month you want to run and drag and drop it over to the left side. The left side is the assigned side and the right side is the unassigned side. Make sure what you want to run is on the assigned side then click save. This should take you back to your original screen. If you do not see anything in the box next to Manage Assignments your report is not going to run and you will need to repeat your steps. Most likely save was not clicked.

Below is a screen shot of what you will see when in Manage Assignments for the Billing Run Date, I have highlighted key items:



Please click on the Blue Manage Assignments box next to Select User to assign the user you are running this report for. Enter the % and your business unit # in the number box at the top and click search. Your BU should show up and you can drag and drop it to the assigned side and click save just like you did previously for the Billing Run Date.

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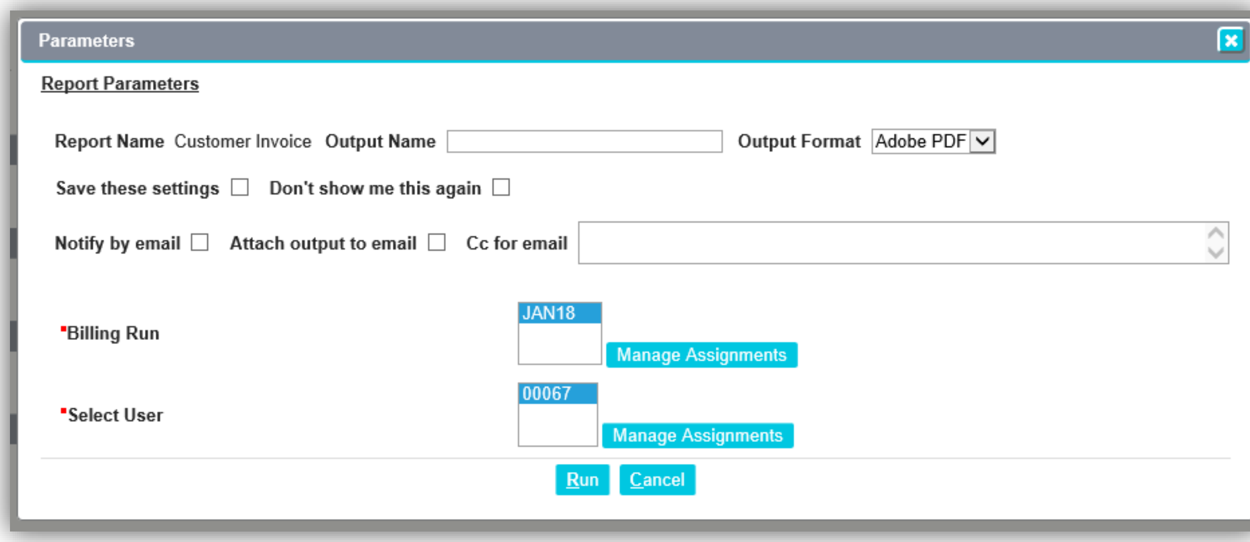
Please make sure you see something in both boxes next to Manage Assignments or the report will not run. It should look like the following:



You are now ready to click run, a pop up will show up shortly and you can either save or download this invoice.