Paper and Paperless Billing Setup Instructions-1407

Introduction

To ensure **successful paperless billing setup**, an account **must** have:

- An **active** Selfcare account
- A **valid** preferred email address

Important Notes for Bill Handling:

- **Authenticate 2 Security Questions OR the CPNI PIN and one (1) Security Question before discussing or changing any applicable CPNI and PII-protected information; customers cannot opt-out of CPNI verification**
- In the **BOLT General Ledger / Selfcare tab,** verify customer set up their Selfcare account
    - If not, assist with **Selfcare account setup**
- Changes can be made to **pending install** and **active accounts**
    - When the statement status is Former or Never**, or Pending Disconnect**, bill handling **cannot** be changed (Pending disco includes **non payment**)
- **Changes** take effect on the **next statement** that generates
- Customers have the option of choosing one: paper **or** paperless billing

- Use the **Paper Bill** section of the procedure when customer receives a bill formatted for **Business**, but customer **is Residential**
- Bills are mailed based on the **Bill Handling Code** setting in the **ICOMS Statement Configuration [BI]** screen
- Use preferred email setting **email bill PDF** only when **specifically requested**; the bill remains available in Selfcare
- Paperless bill customers receive email notification from info@[company_domain].com when the **latest billing statement is ready** in Selfcare
- **Multiple statement** accounts can be set up differently for **paper and paperless bill**

Resolution Steps

Expand All | Collapse All

Setup Paperless or Paper Billing in BOLT

Setup Paperless Billing with an Emailed PDF Bill

Setup Paper or Paperless Billing in ICOMS

Online URL: https://agentx-astound-kb-qa.hgsdigital.com/article.php?id=199