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

Alternate Print Statement Selections (Reference and Troubleshooting Only!)

Online URL: https://agentx-astound-kb-qa.hgsdigital.com/article.php?id=267