Customer support information

Things to think about

- Consider setting your business up so that people who are key to running your business (for example those who make payments) are able to continue working from home, by ensuring they have compatible hardware and software at home, and have tested their systems access.

- Consider different ways of working to minimise the likelihood of your system administrators, security contacts or users all being impacted. For example, if you are able to ensure these individuals maintain "social distancing" in order to minimise likelihood of transmission between multiple individuals.

- Ensure that your Barclays digital channels set up is prepared for individuals being affected by Covid-19 – for example if you have just one system administrator, you may wish to consider setting up another administrator to avoid having a dependency on one person or if you have a dual set up and only two system administrators you may wish to consider adding more.

- Prepare for the possibility that holiday and multiple person sickness could limit your ability to make payments – perhaps plan ahead by "future dating" payments or give other people access to make payments.

- Ensure all contact details are up to date for everyone who uses Barclays digital channels.

- Maintain your processes and controls, particularly for payments, if adding new users or changing ways of working to adapt to remote working.

- Consider asking everyone who uses Barclays digital channels to keep smartcard readers / biometric readers, smart cards / biometric SIMs with them in case travel issues or inability to travel, so that they can access systems from at home.

- Consider attending the free fraud webinars that Barclays offers, especially for any new users of the Barclays digital channels, but also available to existing users.

Useful tips to check your setup & being prepared

During Covid-19 you may find yourself or your colleagues working from home more or having to adapt your regular working styles to accommodate colleagues and your business. Below are some helpful hints to help support ahead of any changes to enable this to be as seamless as possible.

Carrying out the below checks could help prepare ahead of any changes:

- Checking addresses of users and Security Contacts
- Checking all users can log in and that they can log in remotely where necessary
- Reviewing users access

Checking address and contact details are correct

Addresses may need to be reviewed to minimise delays when ordering cards and readers. They may not have updated these in a while and you may require additional readers or cards and PINs.

User Address – PIN will be delivered to this address

Security Contact Address –Cards and Readers will be delivered to this address

- Users addresses can be checked within iPortal
  Admin > Users > Click on the users name (with blue hyperlink)
- Users addresses can be updated within iPortal
  Admin > Users > click 3 dots by name (under active or inactive) > amend users > this page captures the new address details
- Security Contact address can be checked within iPortal
  iPortal – when clicking on a user, you will see where the card and card reader would go to if a new card was ordered, showing the Security Contacts' address

Please note: Security Contact details can be amended/deleted or added via a Client Amendment Form

Check all users can log in successfully

There may be some users that only use the systems occasionally but they may need to log in at some point due to illness/holidays.

Steps to take:

Each user will have their own card and PIN. Please advise them to try to log in to ensure they can access the system at any point. If they have forgotten their PIN a new card and PIN will need to be ordered. It's also worth asking if they can test their access remotely if required.

- To order a new card or device within iPortal
  Admin > Users > 3 dots by user name > order replacement device
- Ordering Additional Readers
  Clients may currently share readers across the business which is fine. But they may find that they need their own to be able to log on from home or another location.

Reviewing Users access

You may wish to review the access of your users with payments access and temporarily change this over the Covid-19 period. The access can always be reviewed again in time.

- To assign new access/roles to an existing user within Barclays.Net
  Admin > Role Profile Association > My Worklist > Processed > Click on the users name
  Step 1 will already be compete as the users name will be selected
  Step 2: Assign Role Profiles, Click Find Role Profile and Go, tick the roles required and

select Add
Tick the roles again on the screen and click Step 3: Create Association
This will then need to be Submitted and Authorised if required.
The user will then be able to log in and have the new access added to their profile.

- To assign new access/roles to a new user within Barclays.Net
  Admin > Role Profile Association > Create Role Profile Association
  Step 1 Click find user > Go > Click on the new user's name and click assign. Then the new users name should show in steps 1, tick the box next to their name
  Step 2: Assign Role Profiles, Click Find Role Profile and Go, tick the roles required and select Add
  Tick the roles again on the screen and click Step 3: Create Association
  This will then need to be Submitted and Authorised if required.

You can get this in Braille, large print or audio by calling 0800 027 1316, Option 1* (via Text Relay or Next Generation Text Relay if appropriate). For more information, please visit barclayscorporate.com/alternativeformats. Clients outside of the UK please contact your local Barclays representative or call +44 207 757 7323, Option 1**.

*Calls to 0800 numbers are free from UK land lines and personal mobiles, otherwise call charges may apply. Please check with your service provider. To maintain a quality service we may monitor or record phone calls. Lines are open Monday to Friday, 8am to 7pm.
**International call charges may apply.