



# Barclays iPortal

Summary of updates

April 2022



# Introduction

To improve your experience of using Barclays iPortal we continuously review and enhance the channel. You will now see some changes and be able to access some new features. In addition, we have made some changes to improve performance.

This document explains the changes.

Updates include:

- Updated iPortal menu & shortcuts

# Updated iPortal menu & shortcuts

The iPortal menu now includes several shortcuts to existing functionality, which is currently only available in Barclays.Net. You will be able to access services by clicking on any of the new shortcuts from iPortal, which will take you directly to the relevant page.

Existing menu options in iPortal have also been amended as part of this integration.

Accounts		Payments	
Account information	Account services	Manage payments	Cheques
View accounts	Direct debits	View payments	Stop cheques
View credit advices	Order Stationery	Make a payment	Image clearing payment status
View debit advices		Payment reports	Image Pay
Cash statement reports		Standing orders	
Export balance and transactions			

New menu item

Shortcut

*'Payments' has been added to the top menu and includes the sub-menu 'Cheques'*

*Standing orders has been added under 'Manage Payments'*

# Updated iPortal menu & shortcuts

FX	Reports		Administration
	Information	Audit and activity	Scheduler
FX calculator	Statements, reports and advices	View activity	Create schedule
FX historic rate sheets		Cash management admin reports	Manage schedules
View fx deals		Audit reporting	
			Client settings
			View client
			Users
			Role profiles
			Workflows
			Device readers
			Statement preferences
			Merchant services administrators
			Payment/reporting preferences

New menu item

Shortcut

'Statements' has been renamed to 'Statements, reports and advices'

Activity' has been renamed to 'View activity'

Entitlements will be driven off existing iPortal Role Profiles – Admin, View Accounts and View Payments

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