



Barclays iPortal

Summary of updates

June 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:

- New look and feel for To Do, Direct Debits
- Barclays.Net shortcut descriptions

New look and feel – To Do

Last year, we refreshed the look and feel of the iPortal homepage and this year we will bring that same look and feel to the rest of iPortal. This month, the screens for To Do and Direct Debits have been refreshed and you can see how they now look in the following slides.

- 1. Filter by type** – The options for 'Authorise, Repair and Delete' have been repositioned and will now be included in a dropdown menu
- 2. Filter by request** – The options for Admin and Services have also been included in a dropdown. The option with the highest number of outstanding items will be populated by default

The screenshot shows the 'To do list' interface with the following elements:

- Title:** To do list
- Subtitle:** View and manage your outstanding tasks
- Refresh button:** Refresh (circular arrow icon)
- Filter by type:** A dropdown menu with '1' and 'Authorize' selected.
- Filter by request:** A dropdown menu with '2' and 'User' selected, showing a count of '1'.
- Search bar:** A text input field with the placeholder 'Search'.
- Table:** A table with columns: USER ID, USER NAME, USER STATUS, PURN, USER TYPE, and ROLE PROFILE NAME. The first row shows a checkbox, 'Admin Test', 'Inactive', and 'System Administrat...'. The second row shows a checkbox, 'Existing Role: ; Ne', and is partially cut off.
- Selection bar:** A bar at the bottom of the table showing '0 of 1 selected'.
- Action buttons:** 'Send to Repair', 'Reject', and 'Authorise'.

Direct Debits - selecting account

1. Account table – All of your accounts will be displayed in this table - once an account has been selected the account details will be shown at the top of the table
2. Filter accounts – Account name or details can be entered into the search box to find a specific account
3. Use the sort option to choose in which order results are displayed
4. Account results – Accounts can be scrolled through and 1 account must be selected before the action buttons will become clickable
5. Cancel/Show Direct Debits – 'Cancel' can be clicked to deselect any selected accounts and 'Show Direct Debits' will load the direct debit details for the selected account

Direct Debits

View, transfer and cancel your Direct Debits

Which account would you like to see Direct Debits for?

Choose an account

1 Account None selected

2 Filter by account name or details

3 Sort accounts by

4

5

Begin typing an account name or details

Account name (A-Z)

Please enter 3 or more characters.

Account name	Account details	Currency
<input type="radio"/>	Account	GBP
<input type="radio"/>	Account	GBP
<input type="radio"/>	Account	GBP
<input type="radio"/>	Account	GBP

Cancel Show Direct Debits

Direct Debits – cancel/transfer

1. This button allows you to deselect the current account and see Direct Debit details for a different account instead
2. Use 'Sort' to change the order in which results are displayed or 'Search' for a specific Direct Debit within the results
3. Filter by Direct Debit status - minimum of 1 status must be selected and 'Active' will be shown as default. All 4 statuses can be selected simultaneously
4. Use the tickboxes to select the Direct Debits you wish to cancel or transfer
5. Originator reference – click on this link to see further details of the Direct Debit and authorisation status
6. If changes have been made to the Direct Debit you will be able to view current status, who requested the change and when it was submitted
7. This button provides further details on the Direct Debit
8. Cancel direct debits has been renamed to 'Cancel selected' and the transfer option has been moved/renamed to 'Transfer selected'

Which account would you like to see Direct Debits for?

Choose an account 1 [Change account](#)

> Account

Direct Debits

Showing 1-25 of 138 Direct Debits 2 Sort [Sort](#) Search [Search](#)

Filter by Direct Debit status

3 [Active](#) [Transferred](#) [Expired](#) [Cancelled](#)

4 5 6 7 8

1 You can only transfer one Direct Debit at a time.

<input type="checkbox"/>	Originator	Originator reference	Last payment date	Last payment amount	Status
<input type="checkbox"/>	Barclays BUSL...	EWRWJ08		£0.00	Active
<input type="checkbox"/>	Barclays BUSL...	SABRW0E		£0.00	Active
<input type="checkbox"/>	Barclays BUSL...	TRET		£0.00	Active
<input type="checkbox"/>	NORWICH UN...	2		£0.00	Active 6 View Direct Debit details
Status Cancellation requested - awaiting Level 2 authorisation Requested by Chetan Khatale Submitted on 2022/04/21 08:21:39 GMT					
<input type="checkbox"/>	CLERICAL ME...	DDON3NOV2		£0.00	Active View Direct Debit details

0 Direct Debit selected 8 [Cancel selected](#) [Transfer selected](#)

[Export](#)

< prev 1 2 3 4 5 6 Next >

Direct Debits - cancel

1. Account details
2. Review Direct Debit details – Provides details of the selected Direct Debits in a table format
3. If you no longer wish to cancel a particular Direct Debit you can remove it from the list
4. 25 Direct Debits will be shown per page and you can use these buttons to view the previous or next set of results
5. Cancel Direct Debits (this was previously named 'Submit')

i If this Direct Debit is due to be collected the next business day, the payment may still be taken from the account. We recommend that you tell the originator it's being cancelled.

1	Account name	
	Sort code	
	Account number	

2 Review Direct Debits details
Check the details before cancelling the Direct Debits.

Originator	Originator reference	Last payment date	Last payment amount	Status	3
FUEL DIRECT LTD	REFER	2000/01/04	£0.10	Active	Remove ✕
FUEL DIRECT LTD	REFER	2000/01/04	£0.10	Active	Remove ✕
FUEL DIRECT LTD	REFER	2000/01/04	£0.10	Active	Remove ✕

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5 Cancel Direct Debits

Direct Debits – transfer

1. Account details
2. Direct Debit details
3. Select an account to transfer to – available accounts will be shown in the table and you will be able to select the account you want to transfer the Direct Debit to. If there is more than 1 result, you can use the 'Sort accounts by' option to choose how the results are displayed
4. Review details – Previously named 'Review'

Previous account details
The Direct Debit will be transferred from this account.

1 Account name
Sort code
Account number

2 Direct Debit details
Check the details before transferring the Direct Debit.

Originator	Originator reference	Last payment date	Last payment amount	Status
FUEL DIRECT LTD	REFER	2000/01/04	£0.10	Active

3 Select an account to transfer to
Direct Debits can only be transferred to another account in the same Legal Entity.

Filter by account name or details Sort accounts by

Please enter 3 or more characters.

	Account name	Account details	Currency
<input type="radio"/>	aa		GBP
<input type="radio"/>	aa		GBP

 4

Direct Debit – review transfer

1. Account details
2. Review Direct Debit details – Provides details of the Direct Debit that will be transferred
3. New account details – displays the details of the new account the Direct Debit will be transferred to
4. Transfer Direct Debit – will submit the request to transfer the Direct Debit

Review previous account details
The Direct Debit will be transferred from this account.

1

Account name	
Sort code	
Account number	

2

Review Direct Debit details
This Direct Debit will be transferred to a new account

Originator	Originator reference	Last payment date	Last payment amount	Status
CLERICAL MEDICAL AND GENERAL	713		£0.00	Active

3

Review new account details
The Direct Debit will be transferred to this account.

Account name	
Sort code	
Account number	

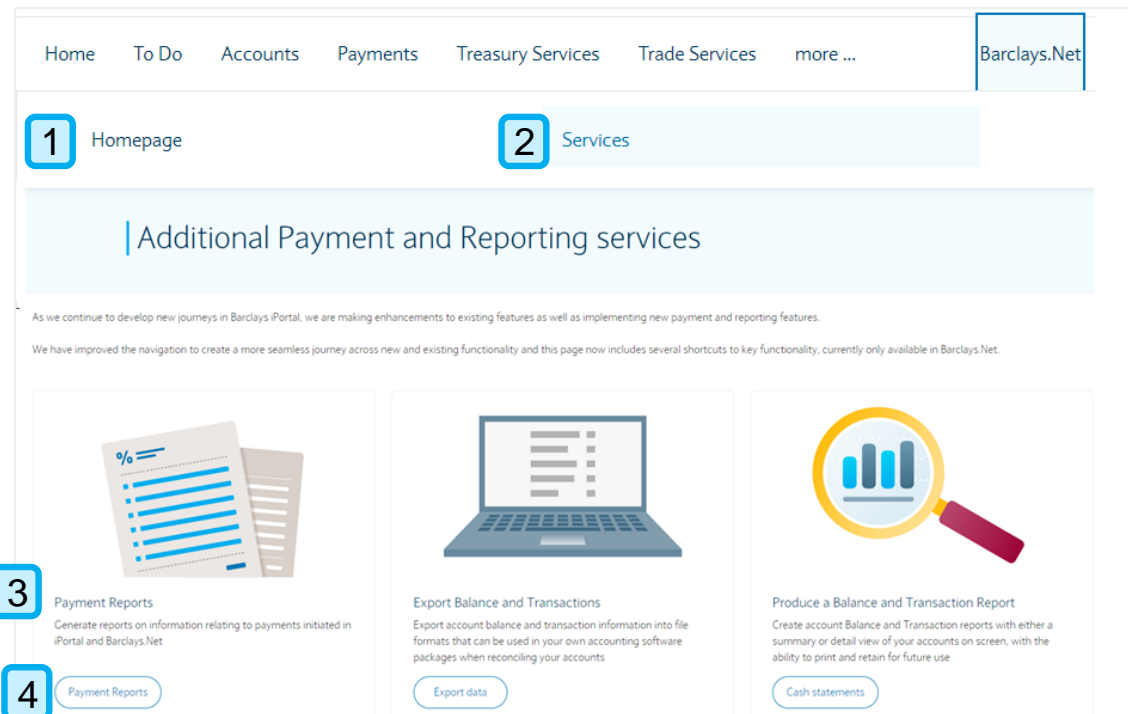
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4 Transfer Direct Debit

New look and feel – Barclays.Net shortcut descriptions

We have improved the navigation between our Digital Channels (Barclays iPortal and Barclays.Net) to create a more seamless journey across new and existing functionality and the Barclays iPortal menu now includes several shortcuts to key functionality, currently only available in Barclays.Net. A new help page provides information on each new shortcut.

1. Takes you to the Barclays.Net homepage
2. The 'Services' option will load the 'Additional Payment and Reporting services' information page
3. An explanation of what each shortcut does
4. Clicking this button underneath the shortcut description will take you directly to the relevant page in Barclays.Net



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