



Barclays iPortal

Summary of updates

September 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 Stop Cheque

New look and feel – Stop Cheque

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 Stop Cheque have been refreshed and you can see how they now look in the following slides.

- 1. Landing page** – The look and feel of the homepage has been modified to show 2 new options
- 2. Raise request** – Start the process of stopping a cheque or a range of cheques
- 3. View request** – View previous stop cheque requests or cancel a stop

1

Raise and view stop cheque requests

If you no longer wish to pay a cheque you've issued, you can raise a stop cheque request.



Raise a stop cheque request

Ask us to stop a cheque or a range of cheques.

2

[Raise request](#)

View and cancel stop cheque request

View the details of previous stop cheque requests and cancel a stop.

3

[View requests](#)

New look and feel – Stop Cheque (Individual)

1. Stop cheque journey is broken down into 5 stages and the bar at the top lets you know current status

2. **Stop type** – you can select to stop an individual cheque or a range of cheques

3. **Select an account** – 1 account can be selected from the account table. You can filter the accounts by entering account name or details (minimum of 3 characters). Accounts can also be sorted by account name or account details

4. **Cancel/Confirm** – 'Cancel' will remove the selected account and 'Confirm' will proceed to the next stage

1 Select account 2 Search cheques 3 Select reason 4 Review 5 Confirmation

2 Stop type

Individual Range

You can request to stop up to 9 individual cheques.

3 Select an account

Account Account GBP

Filter by account name or details Sort accounts by

Begin typing an account name or details Account name (A-Z)

Please enter 3 or more characters.

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

4 Cancel Confirm

New look and feel – Stop Cheque (Individual)

1. Stage 2 is 'Search cheques'
2. **Selected account** – The account selected in Stage 1
3. **Change account** – Use this button to change the currently selected account
4. **Enter cheque number** – Number of the cheque that needs to be stopped
5. **Add another cheque** – This button will duplicate the enter cheque number field. You can select this option up to 9 times
6. **Search period**
7. **Go back** – Return to previous stage
8. **Search cheques** – Proceed to stage 3

1 Select account

2 Search cheques

3 Select reason

4 Review

5 Confirmation

Stop type

Individual Range

You can request to stop up to 9 individual cheques.

Select an account

2 > Account Account00 iBP

3 Change account

Enter a cheque number

4 e.g. 123456

5 Add another cheque

Choose search period

6 3 months 6 months 9 months 13 months

7 Go back

8 Search cheques

New look and feel – Stop Cheque (Individual)

1. Stage 3 is 'Select reason'
2. **Selected account** – The account selected in Stage 1
3. **Cheque number** – The cheque number that was entered in Stage 2. If multiple cheques have been entered they will be listed separately
4. **Dropdown** – To open and collapse the cheque options
5. **Reason for stopping cheque** – You can choose between: 'lost', 'stolen' or 'other'. This field is mandatory. Once the reason has been selected the additional optional fields will populate
6. **Cheque date** – The date the cheque was issued
7. **Payee** – The name of the payee the cheque was issued to
8. **Comments** – A free format box to enter any additional information
9. **Review** – Proceed to Stage 4

The screenshot shows the 'Stop Cheque (Individual)' form with the following elements:

- Progress bar:** A horizontal line with five circles. Circles 1, 3, 4, and 5 are numbered. Circle 2 is highlighted with a blue square. Above the circles are icons: a green checkmark for 'Select account', a green checkmark for 'Search cheques', a blue square with a white '1' for 'Select reason', a blue square with a white '3' for 'Review', and a blue square with a white '5' for 'Confirmation'.
- Stop type:** Two buttons: 'Individual' (highlighted with a blue square) and 'Range'.
- Account selection:** A field with a blue square callout '2' containing the text 'Account', 'AccountC', and 'GBP'.
- Search results:** A message: 'The earliest ledger date we have searched for cheques is 16/07/2021.'
- Cheque number:** A field with a blue square callout '3' containing the text 'Cheque number - 1'.
- Reason for stopping the cheque:** A dropdown menu with a blue square callout '5' showing 'Lost'.
- Amount (GBP):** A text input field with a value of '0.00'.
- Cheque date (DD/MM/YYYY):** A text input field with a blue square callout '6' showing 'DD/MM/YYYY'.
- Payee:** A text input field with a blue square callout '7' showing 'Enter payee'.
- Comments:** A large text area with a blue square callout '8' showing 'Maximum 80 characters'.
- Buttons:** 'Go back' and 'Review' buttons at the bottom.

New look and feel – Stop Cheque (Individual)

1. Stage 4 is 'Review'
2. **Review the details**
3. **Cheque number** – The cheque number(s) entered in Stage 2
4. Reminder that if authorisation is required the stop will not be active until it has been authorised.
5. **Submit** – To submit the stop cheque request and proceed to Stage 5

Progress bar: Select account (✓) — Search cheques (✓) — Select reason (✓) — **1** Review (4) — 5 Confirmation

2 Review the details
Check everything's as it should be, then submit the stop cheque request.

Account details

Account name	
Sort code	
Account number	
Contact name	
Contact number	


3 Cheque number - 1

4 ⓘ If a stop cheque request requires authorisation, the stop will not be active until it has been authorised.

Go back **5** Submit

New look and feel – Stop Cheque (Individual)

1. **Confirmation**
2. **Account details**
3. **Cheque number**
4. Reminder that you can track the status of this Stop Cheque request in 'Activity'
5. **Raise another request**
– Will take you back to Stage 1
6. **View stop cheque requests**




1 A stop cheque request has been successfully submitted.


2

Account name	
Sort code	
Account number	

3

Cheque number 

4

 You can track its status in activity

5

Raise another stop request

6

View stop cheque requests

New look and feel – Stop Cheque (Range)

1. The journey for a range of cheques is broken down into 4 stages and the bar at the top lets you know current status
2. **Stop type**
3. **Select an account** – 1 account can be selected from the account table. You can filter the accounts by entering account name or details (minimum of 3 characters). Accounts can also be sorted by account name or account details
4. **Cancel/Confirm** – 'Cancel' will remove the selected account and 'Confirm' will proceed to the next stage

1
Select account

2
Enter details & reason

3
Review

4
Confirmation

2

Stop type

Individual

Range

You can request to stop a range of up to 240 cheques.

Cheques will only be stopped if they're presented after your request is complete (including any authorisations).

Once you submit the request, we won't check whether any of the cheques in this range have already been presented. You can use your account statements to determine this.

3

Select an account

Account
Account0
GBP

Filter by account name or details

Sort accounts by

Account name (A-Z)

Please enter 3 or more characters.

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

Cancel

Confirm

New look and feel – Stop Cheque (Range)

1. Stage 2 is 'Enter details & reason'
2. **Selected account** – The account selected in Stage 1
3. **Change account** – Use this button to change the currently selected account
4. **Cheque range from/to** – You can request to stop a range of up to 240 cheques
5. **Reason for stopping** – 'Lost', 'Stolen', 'Did not receive' and 'Other' can be selected. If 'Other' is selected an additional comments box will populate to enter details (optional)
6. **Review** – Proceed to Stage 3

The screenshot displays the 'Stop Cheque (Range)' process flow and the corresponding form. The flow consists of four stages: 1. Select account, 2. Enter details & reason, 3. Review, and 4. Confirmation. The current stage is 'Enter details & reason'.

Stop type

Individual **Range**

You can request to stop a range of up to 240 cheques.

Cheques will only be stopped if they're presented after your request is complete (including any authorisations).

Once you submit the request, we won't check whether any of the cheques in this range have already been presented. You can use your account statements to determine this.

Select an account

2 > Account aardvarkaccount3 2

3 Change account

Cheque range from **Cheque range to**

4 [Input field] [Input field]

Reason for stopping the cheque

5 Select [Dropdown menu]

Go back **6 Review**

New look and feel – Stop Cheque (Range)

1. Stage 3 is 'Review'
2. **Review the details**
3. **Cheque number** – The cheque numbers that were entered in Stage 2
4. Reminder that if authorisation is required the stop will not be active until it has been authorised.
5. **Submit** – To submit the stop cheque request and proceed to Stage 4 (Confirmation page for Range is same as Individual, shown in slide 8)

The screenshot displays the 'Review' stage (Step 3) of the Stop Cheque (Range) process. At the top, a progress bar shows four steps: 'Select account' (Step 1, green checkmark), 'Enter details & reason' (Step 2, green checkmark), 'Review' (Step 3, blue square with '1'), and 'Confirmation' (Step 4, blue circle with '4').

Below the progress bar, Step 2 is highlighted with a blue square containing the number '2'. The text reads: 'Review the details' and 'Check everything's as it should be, then submit the stop cheque request.'

The 'Account details' section contains a table with the following fields:

Account details	
Account name	
Sort code	
Account number	
Contact name	
Contact number	

Step 3 is highlighted with a blue square containing the number '3'. It shows a dropdown menu labeled 'Cheque number - 1' with a downward arrow.

Step 4 is highlighted with a blue square containing the number '4'. It shows an information icon (i) and the text: 'If a stop cheque request requires authorisation, the stop will not be active until it has been authorised.'

At the bottom, there is a 'Go back' button and a 'Submit' button. The 'Submit' button is highlighted with a blue square containing the number '5'.

New look and feel – View and cancel Stop Cheque request

1. **View requests** – Clicking this button will load account selection screen
2. **Account select** – Mirrors the account selection table from Stage 1 of the Stop Cheque journey

The diagram illustrates the user journey for viewing and canceling stop cheque requests. It starts with a screen titled 'View and cancel stop cheque request' which includes an illustration of a hand tapping a smartphone. Below the title, it says 'View the details of previous stop cheque requests and cancel a stop.' A blue box with the number '1' highlights the 'View requests' button. An arrow points from this button to the 'Account select' screen, which is marked with a blue box and the number '2'. The 'Account select' screen prompts the user to 'Select an account' and shows a table of accounts with columns for 'Account name', 'Account details', and 'Currency'. The table lists four accounts: 'aardv', 'aardv', 'Acc', and 'Acco'. At the bottom of the screen are 'Go back', 'Cancel', and 'Show requests' buttons.

View and cancel stop cheque request

View the details of previous stop cheque requests and cancel a stop.

1 View requests

2 Which account would you like to see stop cheques for?

Select an account

Account None selected

Filter by account name or details

Sort accounts by

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"/>	aardv		
<input type="radio"/>	aardv		
<input type="radio"/>	Acc		
<input type="radio"/>	Acco		

Cancel Show requests

Go back

New look and feel – View and cancel Stop Cheque request

- 1. Selected account** – Account that was selected from the account table in the pervious page
- 2. Change account** – Takes you back to the account table to change the selected account
- 3. Sort/Filter** – Cheque table can be sorted and filtered using the different options (further details found on slide 14)
- 4. Status options** – Cheque table can be filtered by the status of the Stop Cheque request. Only 1 status can be selected
- 5. Cheque number** – Hyperlink that can be selected for further details (details on slide 15)
- 6. Cancel** – Hyperlink for the selected cheque to be cancelled
- 7. Dropdown** – Provides details of cheque date and payee
- 8. Go back** – Takes you back to the Stop Cheque landing page

Which account would you like to see stop cheques for?

Select an account

1 > Account aardvarka

2 Change account

Showing 1-8 of 8 stop cheque requests created between 2022/02/24 and 2022/08/23

3 Sort Filter

Filter by stop cheques request status

4 All Active Expired Cancelled

5

Cheque number(s)	Stop date	Amount (£)	Reason	Status	Action
127635	2022/08/18		Stolen	Active	6 Cancel 7 ▾
Cheque date Payee					
15	2022/08/17	112.00	Lost	Active	Cancel >
32	2022/08/17		Other	Cancelled	>
23	2022/08/11		Lost	Cancelled	>
54	2022/08/10	1.00	Lost	Active	Cancel >
12	2022/08/09	1.00	Lost	Active	Cancel >
12	2022/08/09	2.00	Lost	Active	Cancel >
64	2022/08/09		Stolen	Active	Cancel >

8 Go back

New look and feel – View and cancel Stop Cheque request

1. Sort by – You can select:

'Cheque number' (0-9 or 9-0)

'Stop date' (New-Old or Old-New)

'Amount' (Highest-Lowest or Lowest-Highest)

2. Sort requests – To sort the cheque table by the selected option

3. Filter by – 'Stop date' is a mandatory first field – you can filter by date up to 13 months

4. Second filter criteria – 'Amount' or 'Cheque number' can be selected

5. Third filter criteria – The last filter will be the unused option of the previous filters

6. Filter requests – Apply the filters

7. Remove – Removes the additional filter

8. Close – Will collapse the sort and filter options

The image shows two panels from a banking interface. The top panel is titled 'Sort requests' and has a close button (X) in the top right. It contains a 'Sort by' dropdown menu with 'Cheque number (0-9)' selected. Below the dropdown are two buttons: 'Sort requests' (highlighted with a blue box and number 2) and 'Reset sort'. The bottom panel is titled 'Filter tasks' and has a close button (X) in the top right. It contains three filter sections. The first section, 'Filter by', has a dropdown with 'Stop date' selected (highlighted with a blue box and number 3). The second section, 'Second filter criteria', has a dropdown with 'Cheque number' selected (highlighted with a blue box and number 4). The third section, 'Third filter criteria', has a dropdown with 'Amount (£)' selected (highlighted with a blue box and number 5). Each section has input fields for 'From' and 'To' dates or amounts. The 'Filter requests' button (highlighted with a blue box and number 6) is at the bottom. The 'Remove' button (highlighted with a blue box and number 7) is next to the 'Second filter criteria' section. The 'Close' button (X) is highlighted with a blue box and number 8.

New look and feel – View and cancel Stop Cheque request

When the cheque number has been selected further details will be provided.

- 1. Account details**– You will be presented with the account details that were previously selected
- 2. Cheque details**– The details that were entered for the cheque on the Stop Cheque request
- 3. Go back**– Takes you back to the previous page
- 4. Cancel request**– Proceed to cancel the selected cheque

1 Account details

Account name	a
Sort code	2
Account number	9
Contact name	L
Contact number	*+44 2000 123456

Cheque details

2

Cheque number - 127635

Reason for stopping the cheque	Stolen
Amount (GBP)	
Cheque date	
Comments	Create Comment
Payee	
Stop status	Active
Stop date	2022/08/18

3

Go back

4

Cancel request

New look and feel – View and cancel Stop Cheque request

After selecting 'Cancel request' or selecting the hyperlink 'Cancel' you will be able to complete the cancelation of the Stop Cheque request.

1. **Account details** – You will be presented with the account details that were previously selected
2. **Cheque details** – The details that were entered for the cheque on the Stop Cheque request
3. **Comment** – You can enter further comments for audit purposes (optional field)
4. **Go back** – Takes you back to the previous page
5. **Submit** – Proceed with the cancelation of the Stop Cheque request

Review the details

Check everything's as it should be, then submit the cancel stop request.

1

Account details

Account name	
Sort code	
Account number	
Contact name	
Contact number	

Cheque details

2

Comment

3

4

5

New look and feel – View and cancel Stop Cheque request

After submitting the cancellation for the Stop Cheque request the confirmation page will provide further details.

1. **Confirmation** will be provided when the Stop Cheque cancellation has been submitted successfully
2. **Account details** – Confirmation of the account details that were entered
3. **Cheque number** entered for the Stop Cheque. The dropdown will provide further details that were entered on the request
4. Reminder that you can track the status of this Stop Cheque request in 'Activity'
5. Raise another request – Will take you back to Stage 1
6. View stop cheque requests

1

Cancel request submitted for Stop cheque. Your request has been sent for level 1 authorisation

2	Account name	ai
	Sort code	2i
	Account number	9i

3

Cheque number - 1:

4

You can track its status in activity

5

Raise another stop request

6

View stop cheque requests

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