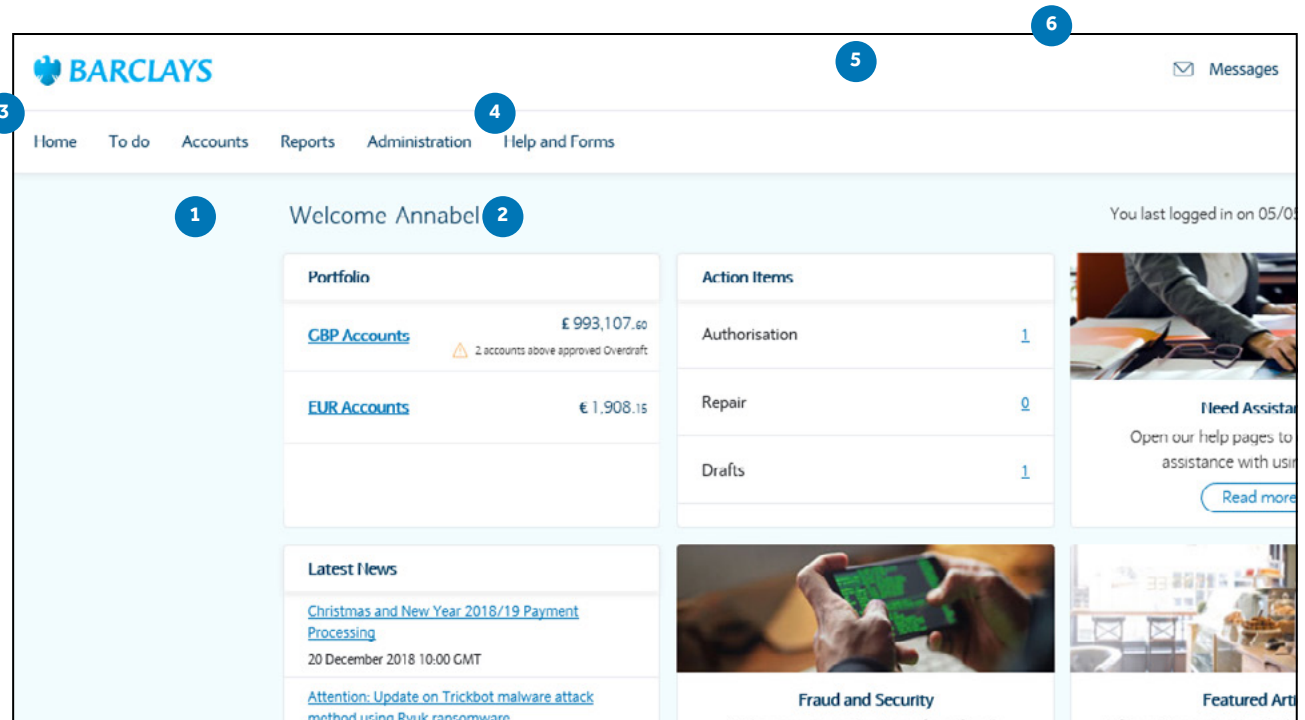


# Barclays iPortal quick start guide

## Key features and benefits:

- One single access point to other Barclays' digital channels including Barclays.Net
- Self-service functionality reduces the process time for tasks that currently require contact to us by phone, email or post
- View consolidated UK Sterling and mainland Europe balances
- Make domestic payments and review live payments
- Receive via SMS, Email and in-channel alerts on outstanding tasks and important service announcements
- Manage regular payments: view, create, amend and cancel standing orders, plus view, cancel and transfer Direct Debits
- Stop Cheques functionality allows users to stop single, multiple or a range of cheques. It also includes the ability to search the history of cheques stopped
- Stationery can be re-ordered online for standard cheque and credit books
- Access Account Statements, Pre-Notifications Charges Statements (PNCS), digital copies of cheques and vouchers, and other account information electronically allowing the reduction of paperwork
- Perform indicative currency exchanges with the iPortal FX Calculator
- Mobile access to Balances and Transactions with the iPortal Mobile App

The Homepage makes it quick and easy to navigate to all areas of Barclays iPortal and also displays useful notifications, information and news.



The screenshot shows the Barclays iPortal homepage for a user named Annabel. The interface includes a top navigation bar with the Barclays logo (5) and a 'Messages' icon (6). Below the logo is a navigation menu with links for Home (3), To do, Accounts, Reports, Administration, and Help and Forms (4). The main content area features a 'Welcome Annabel' (1) message with a 'You last logged in on 05/0...' notification (2). The 'Portfolio' section displays 'GBP Accounts' with a balance of £ 993,107.60 and a warning for '2 accounts above approved Overdraft', and 'EUR Accounts' with a balance of € 1,908.15. The 'Action Items' section lists 'Authorisation' (1), 'Repair' (0), and 'Drafts' (1). A 'Latest News' section includes articles about 'Christmas and New Year 2018/19 Payment Processing' and 'Attention: Update on Trickbot malware attack method using Ryuk ransomware'. There are also sections for 'Fraud and Security' and 'Featured Art'.

**Note:** Barclays iPortal is accessible globally, however some features are only available for accounts in certain countries. Refer to the iPortal functionality sheet for more guidance.

## Navigation

There are two ways to navigate to different areas in Barclays iPortal:

- The first is via the nuggets on the Homepage
- The second is via the main menu.

The diagrams on the previous page will help you find these navigation tools.

**Please note:** the diagram is a representation of a user who has access to all of the functionality within Barclays iPortal. If you do not have the menu options listed, this is due to your entitlements.

## Main navigation nuggets and menu

1. **Portfolio widget** – a snapshot of consolidated balances.
2. **Action Items** – a snapshot of any outstanding tasks you have in your worklist for authorisation or repair. Each task is hyperlinked which can be selected to take you to the appropriate screen to action.
3. **Main menu bar** – available at the top of each screen, this allows you to move to the different areas and services you are entitled to, from wherever you are in the application:
  - **Home** – go back to the Homepage from anywhere within the application
  - **To Do** – worklist of items awaiting authorisation or repair

## Accounts

- Make a payment
- Account Balances and Transactions
- View and Manage Payments
- Direct Debit Management
- Standing Order Management
- Stop cheques
- Stationery re-ordering

## Reports

- PDF UK Sterling & Currency accounts, and Barclays Europe Euro account statements, Ping It reports and PNCS (ebilling)
- Digital copies of cheques and vouchers
- Liquidity Reports
- FX reports
- End of Day Reports
- Tax Statements
- And more...

**Please note:** download speeds will vary depending on internet connection, the size of the report and volume of reports downloaded in one action.

- Administration – All users can update personal preferences and memorable word and passcode.

Users with administrator privileges can manage users and entitlements including the iPortal Mobile App.

## Require further assistance?

The help sections within Barclays iPortal can assist you with everyday tasks:

4. **Help and Forms** – access to quick start guides for certain services, frequently asked questions on a range of topics and Amendment Forms.

## Communication

5. **Messages** – view service announcements including outages for maintenance releases.
6. **Notifications** – Set up SMS, Email and in-channel alerts for outstanding tasks such as Barclays.Net Payments and Service Announcements.

You can get this in Braille, large print or audio. For more information, please contact your local Barclays representative or visit [barclayscorporate.com/alternativeformats](https://www.barclayscorporate.com/alternativeformats)

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