

*Aksi dan
Kolaborasi*

Account & Dashboard ACCOUNT

TUTORIALOCTOBIZ2024



Dashboard

Menu : Dashboard | Deskripsi: Fungsi ini untuk menunjukkan bagaimana Pengguna dapat *Customize Dashboard*

Langkah 1. [1] [Maker] Mengakses halaman Login, login sebagai **Maker** dengan mengisi **Company ID & User ID** > [2] Klik tombol **Next**

OCTO Biz
BY CIMB NIAGA

Important Notices | CIMB is available 7 days a week, from 12.15am to 12am

Need to submit your OCTO Biz Maintenance Request? Just email us.

In line with our efforts to provide you with a seamless banking experience, kindly submit the OCTO Biz maintenance request / documents for the following requests listed below via e-mail or continue to submit at any CIMB Branch.

[Find Out More](#)

Welcome

Company ID
CORPPT200092

User ID
makerjames

Next

[Forgot Password/Unlock User >](#) | [Lost or Damaged Secure Token >](#)

Do not reveal any form of confidential information, be it personal or account related, via pop-up message or email link.

Privacy Policy | Security Arrangement | Client Charter | Terms & Conditions

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1 Isi **Company ID & User ID**

2 Klik tombol **Next**

Dashboard

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Langkah 2. [1] [Maker] Isi **Password** > [2] Klik tombol **Proceed**

The screenshot shows the OCTO Biz login interface. On the left, there is a promotional banner for 'Need to submit your OCTO Biz Maintenance Request? Just email us.' with a 'Find Out More' button. On the right, the login card displays the user name 'SpaceMan' and a 'Welcome' message. The password field is highlighted with a red box and labeled '1 Isi Password'. The 'Proceed' button is also highlighted with a red box and labeled '2 Klik tombol Proceed'. A warning message at the bottom left states: 'Do not reveal any form of confidential information, be it personal or account related, via pop-up message or email link.'

1 Isi **Password**

2 Klik tombol **Proceed**

Tipe *Widget*

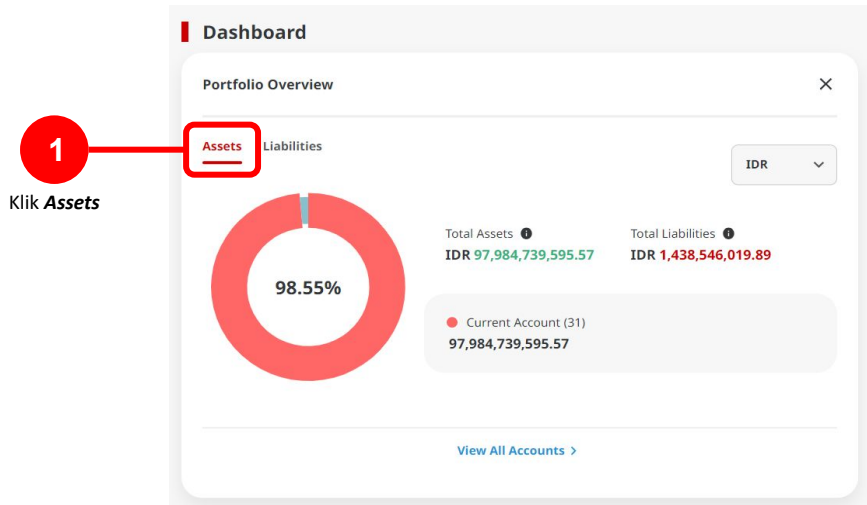
1. *Portfolio Overview Widget*
2. *Task List Widget*
3. *Daily Cut Off Time Widget*
4. *Announcement and Promotion*

Dashboard

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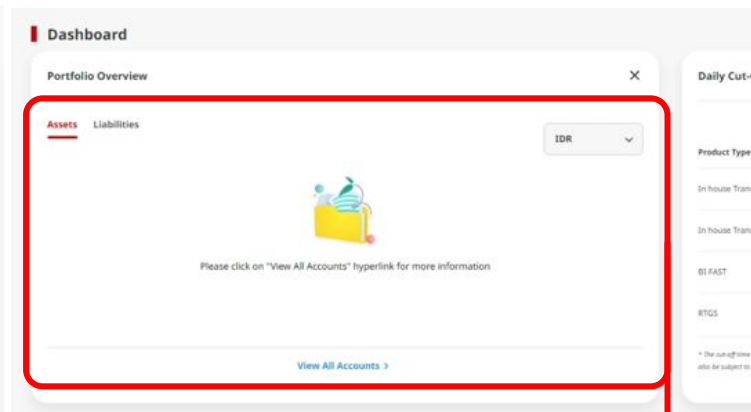
Check Asset

Langkah 4. [Maker] [1] Klik **Asset** > [2] Sistem akan memunculkan **Asset Overview**



1
Klik **Assets**

Catatan: Jika Terdapat data, akan menampilkan **Diagram**



Catatan: Jika Tidak ada data, Halaman akan Kosong

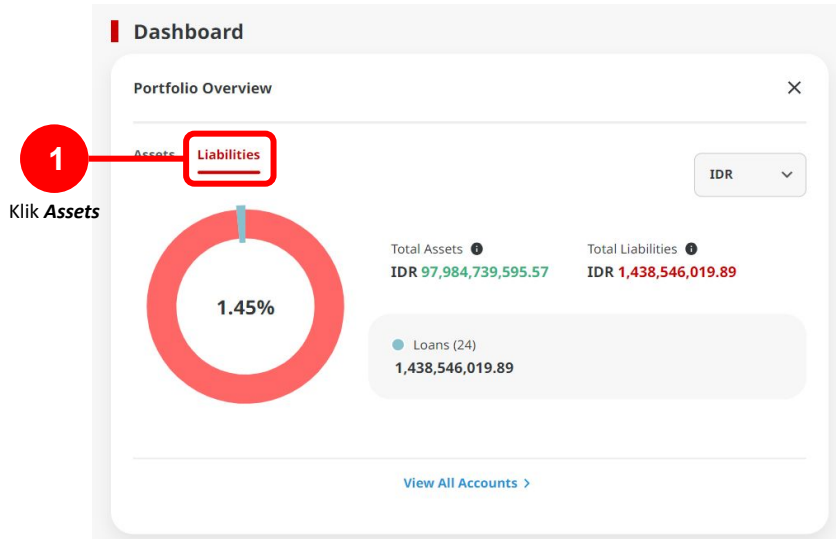
2
Assets Overview

Dashboard

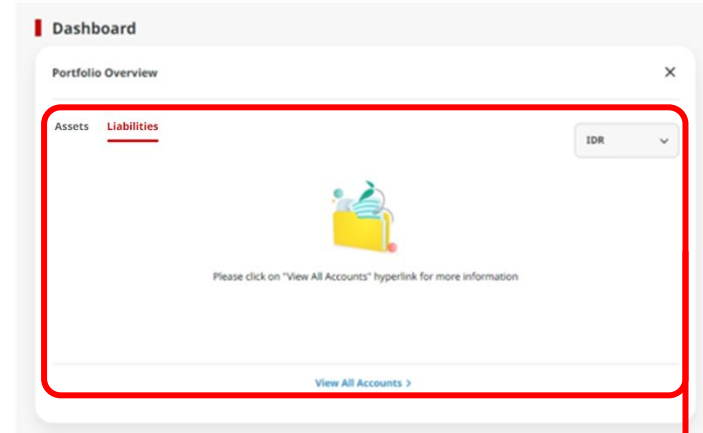
Menu : Dashboard | Deskripsi: Fungsi ini untuk menunjukkan bagaimana Pengguna dapat *Customize Dashboard*

Check Liabilities

Langkah 5. [Maker] [1] Klik **Liabilities**> [2] Sistem akan memunculkan **Liabilities Overview**



Catatan: Jika Terdapat data, akan menampilkan **Diagram**



Catatan: Jika Tidak ada data, Halaman akan Kosong

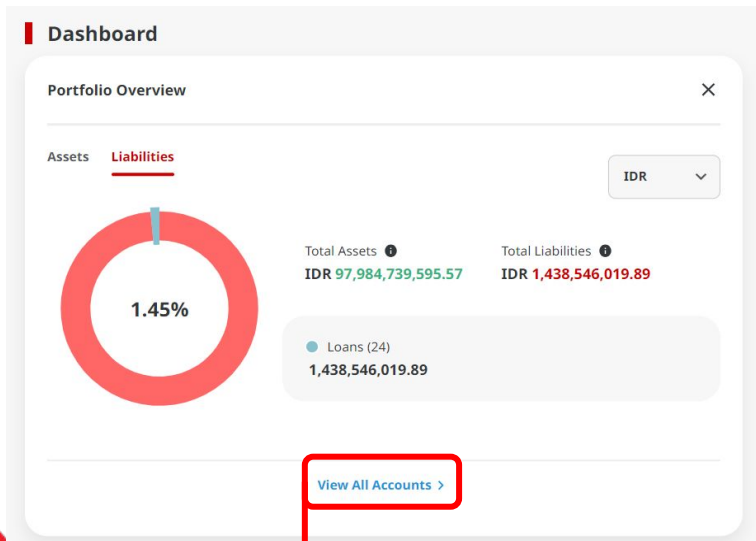
Assets Overview

Dashboard

Menu : Dashboard | Deskripsi: Fungsi ini untuk menunjukkan bagaimana Pengguna dapat *Customize Dashboard*

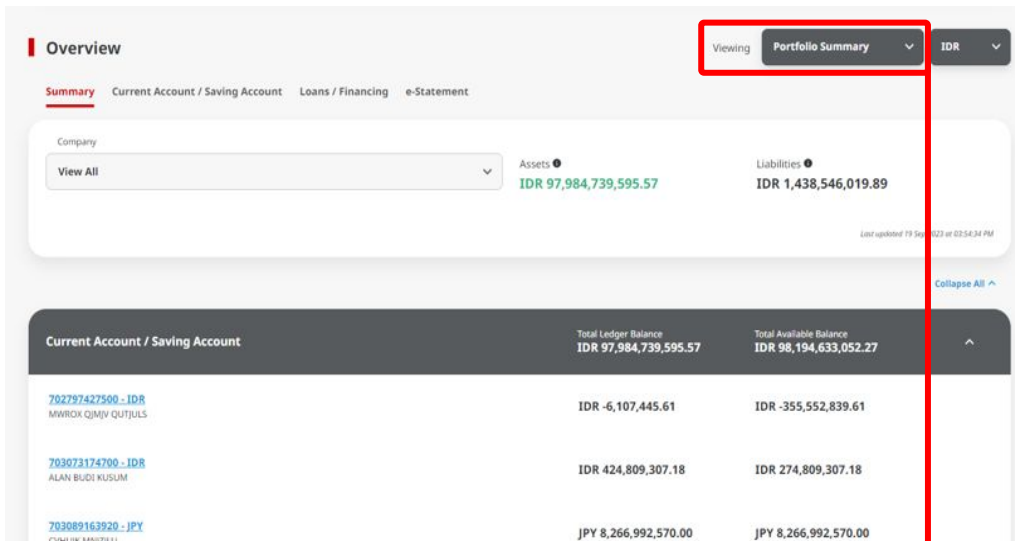
Check Overview All Accounts

Langkah 5. [Maker] [1] Klik **View All Accounts**, Sistem akan menampilkan **Halaman Overview Account**.



1

Klik **Assets**



2

Untuk melihat **Portfolio Summary** dalam bentuk **Dropdown list**

Tipe *Widget*

1. *Portfolio Overview Widget*
2. *Task List Widget*
3. *Daily Cut Off Time Widget*
4. *Announcement and Promotion*

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Setelah melakukan login:

Langkah 4: Pada **task list widget**, [User] dapat melihat list untuk Pending Task > **[1]** Klik tombol **go to task list hyperlink** untuk mengarahkan ke halaman **Task list**

Task List [Close]

6380 All	1576 Draft	4464 Pending Approval	74 Pending Verification	194 Recalled	72 Returned
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Product / Function	Reference No.	Value Date	Amount	Status
Transfer to Own CIMB Account	IIA23101900000126	19 Oct 2023	IDR 5,000.00	Pending Approval
BI-FAST	IBI231019000018529	19 Oct 2023	IDR 50,000.00	Pending Approval
Transfer to Other CIMB Account	IIT231019000000053	20 Oct 2023	IDR 90,000.00	Pending Approval
Transfer to Own CIMB Account	IIA231019000000125	19 Oct 2023	IDR 10,000.00	Pending Approval
Transfer to Own CIMB Account	IIA231019000000124	19 Oct 2023	IDR 2,000,000.00	Pending Approval

[Go To Task List >](#)

1 Klik **Go To Task List**

Announcement & Promotion [Close]

No Records Found

Dashboard

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Langkah 5: Sistem akan mengarahkan ke Halaman **Task List**

The screenshot shows the 'Task List' interface. At the top right, there is a 'Viewing' dropdown menu with 'Transactions' selected, highlighted by a red box. Below this, there are filters for 'Transaction Type' (set to 'All') and 'Filter by Status' (set to 'All'). The main content is a table with 2656 results. The table has columns for Transaction Type, Amount, Beneficiary Bank, Beneficiary Name, Account Nickname, Status, and Action. The first five rows of the table are as follows:

Transaction Type	Amount	Beneficiary Bank	Beneficiary Name	Account Nickname	Status	Action
Inhouse Transfer to Own	IDR 1,000.00	-	-	INTBM WAHYU	Returned by Approver	Delete Edit
Inhouse Transfer to Own	IDR 2,000.00	-	-	INTBM WAHYU	Returned by Approver	Delete Edit
Inhouse Transfer to third Party	IDR 2,000.00	CIMB Niaga	ANJAR ASMORO HERAYANTO	INTBM WAHYU	Returned by Approver	Delete Edit
Inhouse Transfer to third Party	IDR 4,000.00	-	-	INTBM WAHYU	Returned by Approver	Delete Edit
BE-FAST	IDR 3,000.00	BANK DANAMON INDONESIA	DORISNO	INTBM WAHYU	Returned by Approver	Delete Edit

Catatan: [1] untuk melihat **Dropdown** pada **task List module**, dapat terlihat di bagian **Task list user Guide**

1

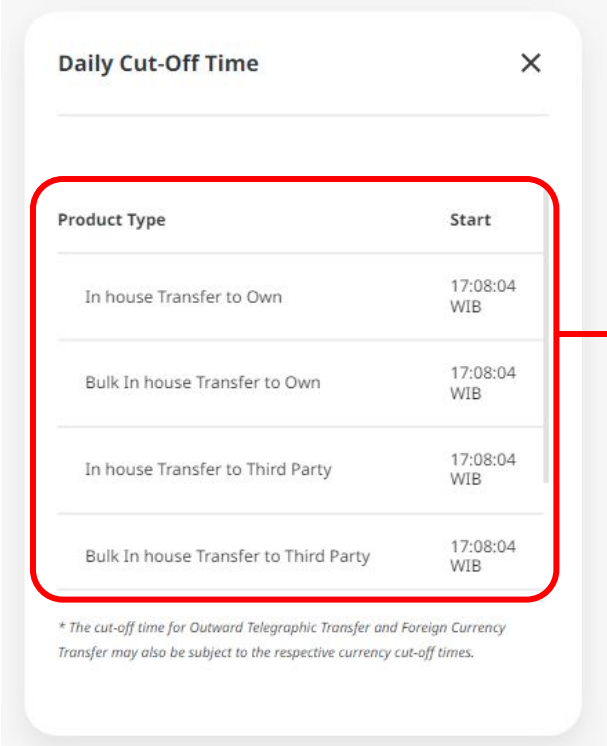
Type Widget

1. *Portfolio Overview Widget*
2. *Task List Widget*
3. *Daily Cut Off Time Widget*
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Langkah 4: User dapat melihat **Daily Cut-Off Time** untuk **[1] Product Type** pada Halaman **dashboard**.



Daily Cut-Off Time ×

Product Type	Start
In house Transfer to Own	17:08:04 WIB
Bulk In house Transfer to Own	17:08:04 WIB
In house Transfer to Third Party	17:08:04 WIB
Bulk In house Transfer to Third Party	17:08:04 WIB

* The cut-off time for Outward Telegraphic Transfer and Foreign Currency Transfer may also be subject to the respective currency cut-off times.

1 Product Type



Type Widget

1. *Portfolio Overview Widget*
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Lanjutan dari *Slide 3*

Langkah 4: **[1]** Klik pada bagian **expand** untuk melihat **[2]** informasi pengumuman & promosi

The image displays two screenshots of a dashboard widget titled "Announcement & Promotion".

The top screenshot shows the widget in a collapsed state. A red box highlights the expand icon (a downward arrow) on the right side of the widget. A callout "1" with the text "Klik Expand" points to this icon.

The bottom screenshot shows the widget expanded. A red box highlights the first announcement item, "TESTNGB", which includes a sub-header "Alert or Notice...". A callout "2" with the text "Informasi dan Promosi" points to this item.