

# OCTO Biz

## Dashboard Personalized Dashboard

TUTORIALOCTOBIZ2024

KEJAR MIMPI

*Aksi dan  
Kolaborasi*





# Personalized Dashboard

**Dashboard – Personalized Dashboard** - Fungsi ini digunakan **User CFO** untuk mengatur alokasi *Widget*. dapat mengubah *Widget* dan *Template*

PAGE  
**03** Edit Widget

PAGE  
**13** Edit Template



# Personalized Dashboard

*Edit Widget*

*Edit Template*



# Personalized Dashboard

*Edit Widget*

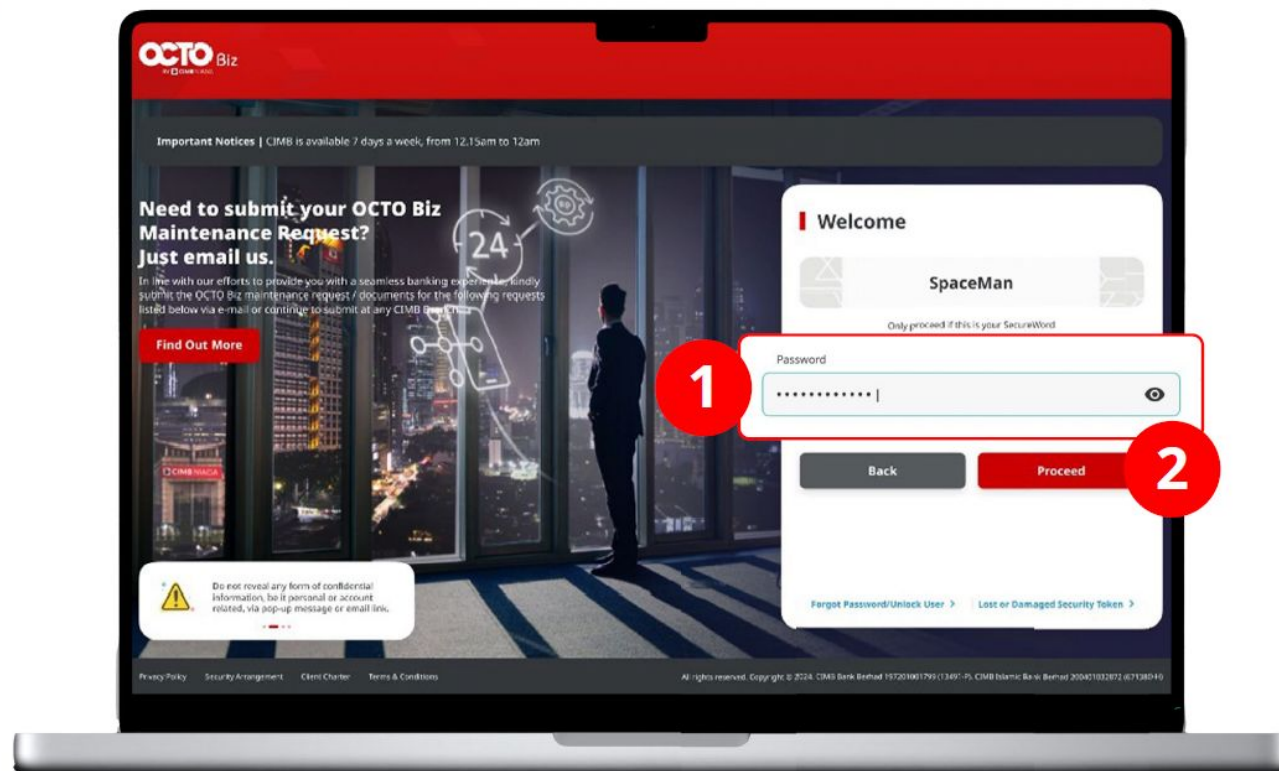
*Edit Template*



1 Login menggunakan  
**Company & User ID**

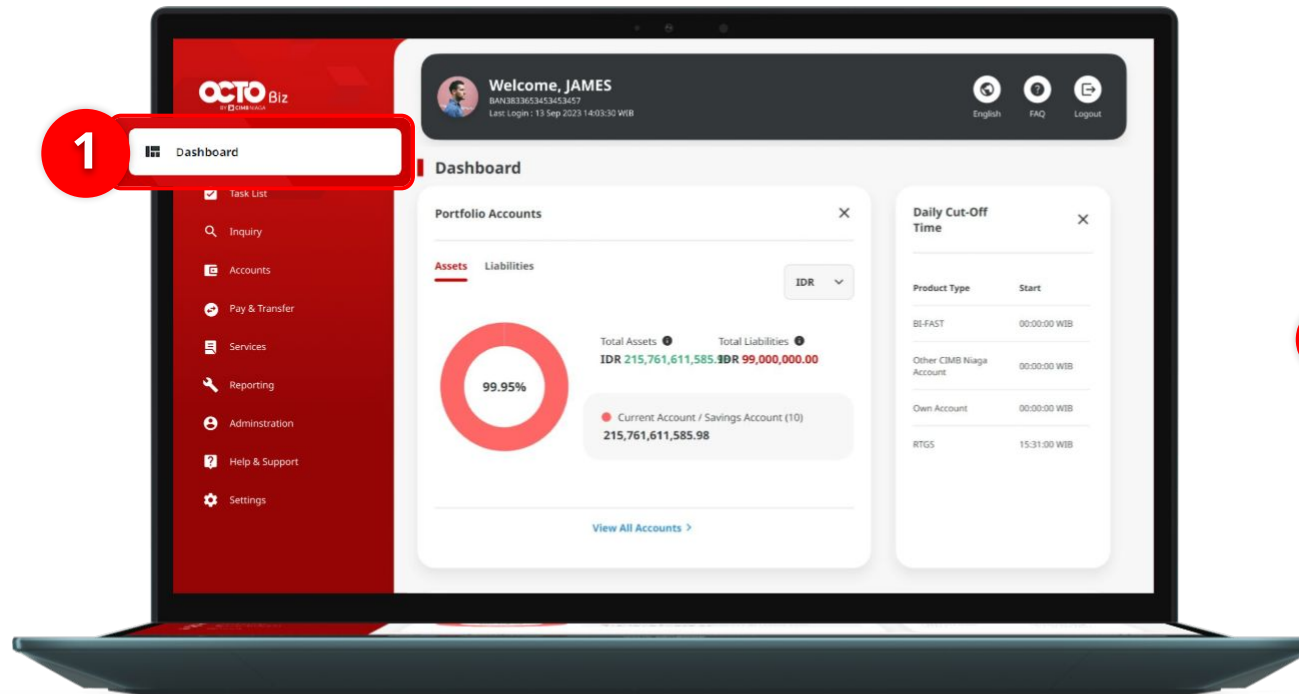
2 Klik **Next**





1 Isi ***Password***

2 Klik ***Proceed***



1 Arahkan Kursor ke **side menu**, klik **Dashboard**

**1** Edit Widget | Edit Template

**Dashboard**

**Transaction History**

Transaction Activity Incoming Transaction

Account

703196574000-IDR-BANGUN PERSADA SEKALI

| Posting Date | Payment Type        | Sender / Beneficiary Name | Debit | Credit     |
|--------------|---------------------|---------------------------|-------|------------|
| 15 Mar 2024  | OVERBOOKING FROM CA | 240315803002529           | 0.00  | \$2,900.00 |
| 12 Mar 2024  | OVERBOOKING FROM SA | 240312803005208           | 0.00  | 120,000.00 |

[View All >](#)

**Portfolio Accounts**

Assets Liabilities

IDR

100.00%

Total Assets IDR 25,061,629,677.72 Total Liabilities IDR 0.00

Current Account (3) 25,061,629,677.72

[View All Accounts >](#)

**Top Beneficiary**

No Records Found

**Daily Cut-Off Time**

Product Type Start

No Records Found

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

**Task List**

| 2 All                                                    | 0 Draft             | 2 Pending Approval | 0 Pending Verification | 0 Recalled       | 0 Returned |
|----------------------------------------------------------|---------------------|--------------------|------------------------|------------------|------------|
| Product / Function                                       | Reference No.       | Value Date         | Amount                 | Status           |            |
| <a href="#">User Status and Secure Token Maintenance</a> | (15/740118000001474 | -                  | IDR 0.00               | Pending Approval |            |
| <a href="#">Manage Notifications</a>                     | (1/24022/003000385  | -                  | IDR 0.00               | Pending Approval |            |

[Go to Task list >](#)

**Announcement & Promotion**

TEST NO EXPIRED <img src=x onerror=alert(sessionStorage.getItem('LoginContext'))>

AD - UAT Test

testttt

TESTNGB

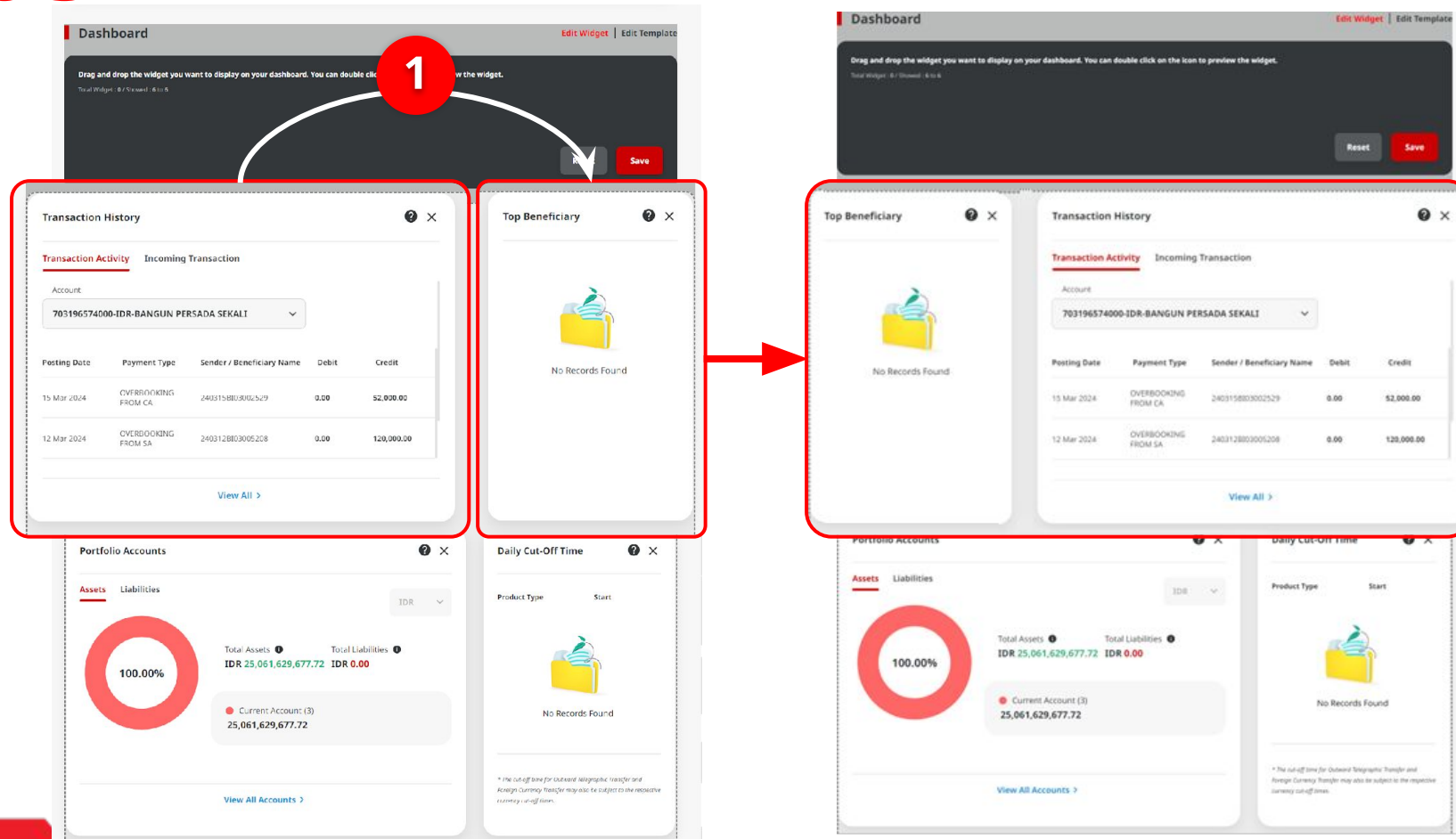
Test Alert & Notices 5

Sistem akan menampilkan halaman ***Dashboard***

**1**

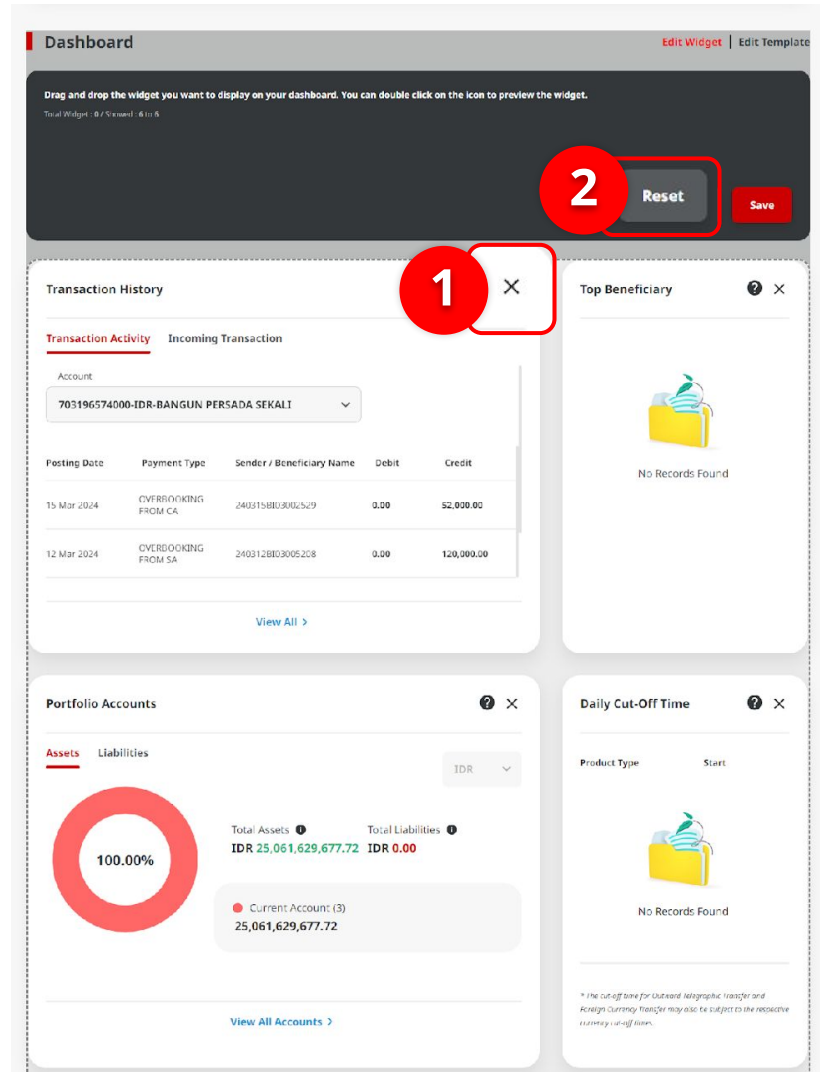
Klik ***Edit Widget***





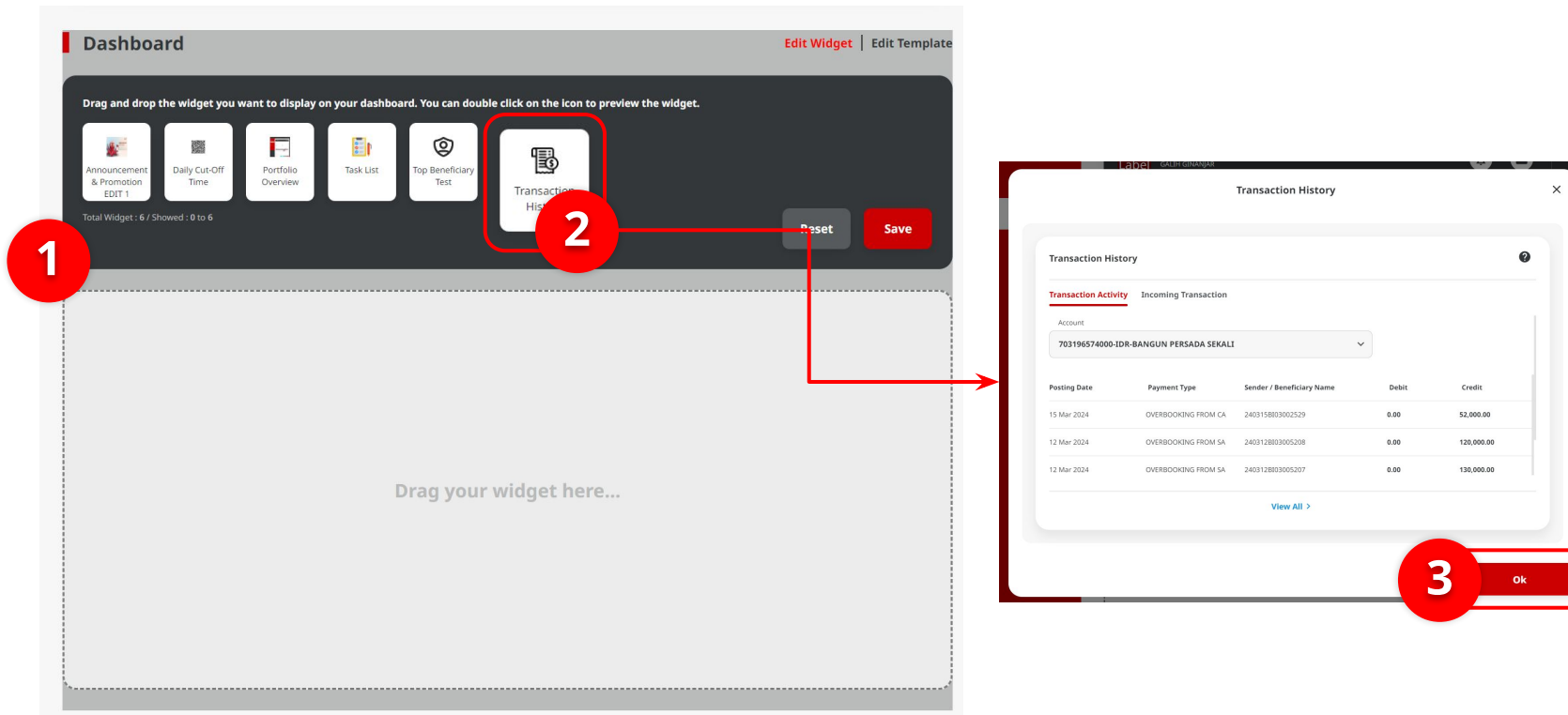
System akan menampilkan halaman **Edit Dashboard**

1 User dapat memindahkan **widget** di **Dashboard**



1 Klik untuk **menghapus Widget** dari **Dashboard**

2 User dapat mengembalikan **pengaturan default** dengan klik pada tombol **Reset**



1 Widget yang telah dihapus, akan otomatis tersimpan di atas **tab Dashboard**

2 Klik 2 kali untuk melihat **Preview Widget**

3 Klik **OK** untuk menutup **Lightbox Preview**

**Dashboard** Edit Widget | Edit Template

Drag and drop the widget you want to display on your dashboard. You can double click on the icon to preview the widget.

1

2

3

4

**Task List** ? X

2 0 2 0 0 0

All Draft Pending Approval Pending Verification Recalled Returned

| Product / Function                       | Reference No.      | Value Date | Amount   | Status           |
|------------------------------------------|--------------------|------------|----------|------------------|
| User Status and Secure Token Maintenance | I15240318000001474 | -          | IDR 0.00 | Pending Approval |
| Manage Notifications                     | I17240227000000385 | -          | IDR 0.00 | Pending Approval |

Go to Task list >

**Transaction History** ? X

Transaction Activity Incoming Transaction

Account

703196574000-IDR-BANGUN PERSADA SEKALI

| Posting Date | Payment Type        | Sender / Beneficiary Name | Debit | Credit     |
|--------------|---------------------|---------------------------|-------|------------|
| 15 Mar 2024  | OVERBOOKING FROM CA | 240315BI03002529          | 0.00  | 52,000.00  |
| 12 Mar 2024  | OVERBOOKING FROM SA | 240312BI03005208          | 0.00  | 120,000.00 |

View All >

1 Widget dapat dipindahkan ke **Dashboard** dibawah

2 Sebagai contoh **Task list & Transaction History**

3 Klik **Save**

4 Klik **Yes**

The screenshot displays a user's personalized dashboard. At the top, a teal banner indicates a 'Request successfully saved' with a checkmark icon and details: 'Reference No.: 113240319000000081' and 'Saved On: 19 Mar 2024 14:36:18 WIB'. Below this is a 'Task List' section with a table showing task counts and details. The tasks are categorized by status: All (2), Draft (0), Pending Approval (2), Pending Verification (0), Recalled (0), and Returned (0). The table lists two tasks: 'User Status and Secure Token Maintenance' and 'Manage Notifications', both with a 'Pending Approval' status. A 'Go to Task list >' link is at the bottom. The 'Transaction History' section shows a dropdown for the account '703196574000-IDR-BANGUN PERSADA SEKALI' and a table of transactions. The table has columns for Posting Date, Payment Type, Sender / Beneficiary Name, Debit, and Credit. Two transactions are listed: one on 15 Mar 2024 for \$2,000.00 and another on 12 Mar 2024 for 120,000.00. A 'View All >' link is at the bottom.

| Product / Function                                       | Reference No.      | Value Date | Amount   | Status           |
|----------------------------------------------------------|--------------------|------------|----------|------------------|
| <a href="#">User Status and Secure Token Maintenance</a> | 115240318000001474 | -          | IDR 0.00 | Pending Approval |
| <a href="#">Manage Notifications</a>                     | 117240227000000385 | -          | IDR 0.00 | Pending Approval |

| Posting Date | Payment Type        | Sender / Beneficiary Name | Debit | Credit     |
|--------------|---------------------|---------------------------|-------|------------|
| 15 Mar 2024  | OVERBOOKING FROM CA | 240315803002529           | 0.00  | \$2,000.00 |
| 12 Mar 2024  | OVERBOOKING FROM SA | 2403128803005208          | 0.00  | 120,000.00 |

Sistem akan menampilkan halaman ***Dashboard*** dengan pesan ***Acknowledgement***





# Personalized Dashboard

*Edit Widget*

*Edit Template*

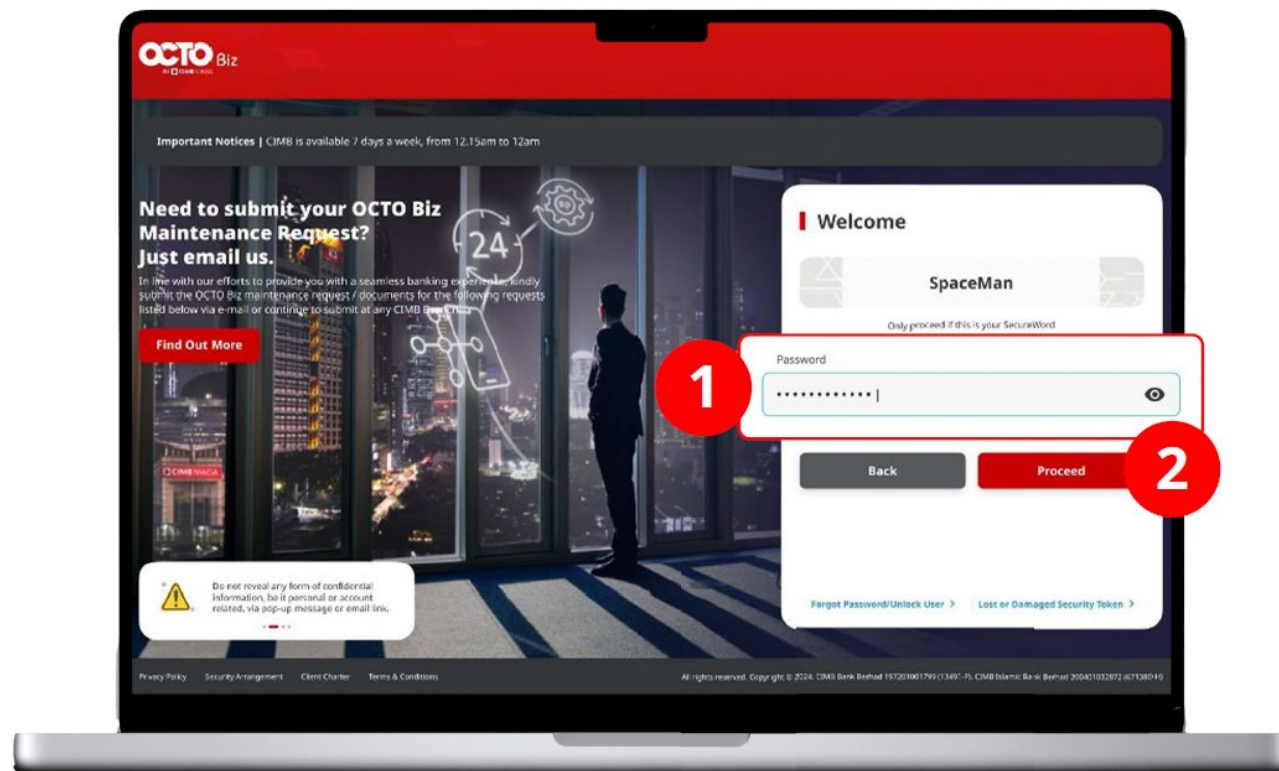


1

Login menggunakan  
**Company & User ID**

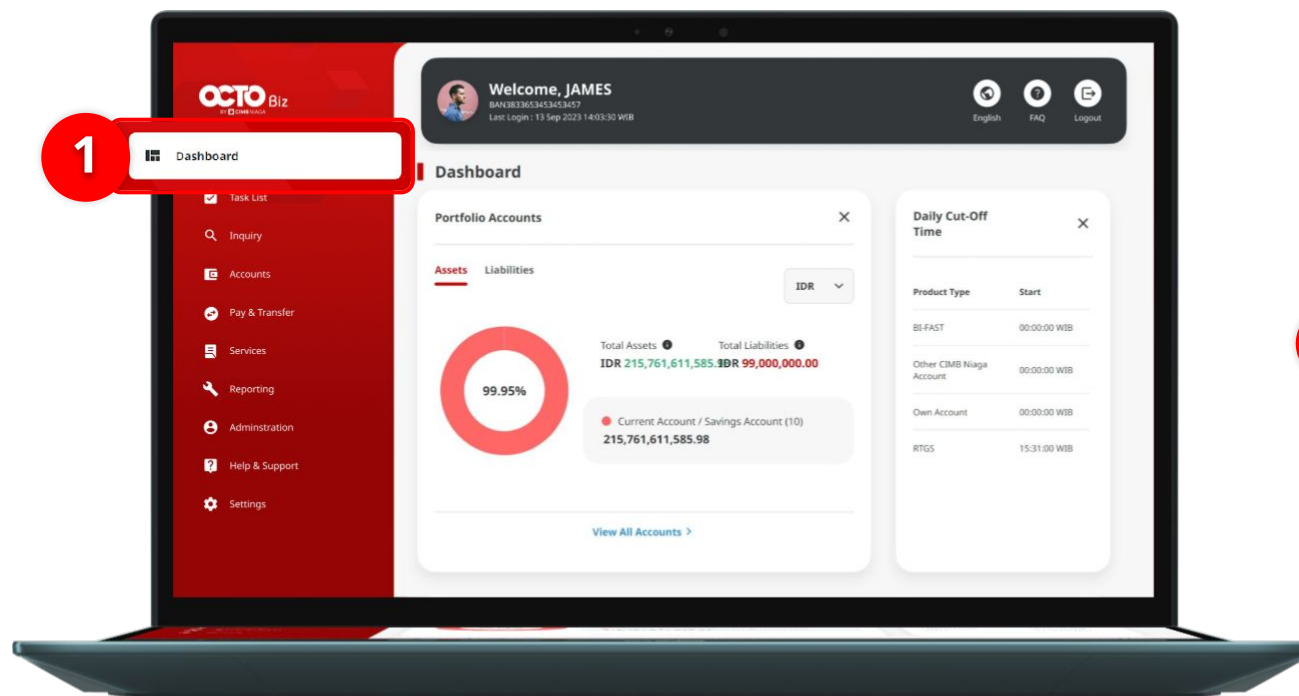
2

Klik **Next**



1 Isi **Password**

2 Klik **Proceed**



1 Arahkan Kursor ke **side menu**, klik **Dashboard**

Dashboard

Edit Widget | **Edit Template** **1**

### Transaction History

Transaction Activity Incoming Transaction

Account

703196574000-IDR-BANGUN PERSADA SEKALI

| Posting Date | Payment Type        | Sender / Beneficiary Name | Debit | Credit     |
|--------------|---------------------|---------------------------|-------|------------|
| 15 Mar 2024  | OVERBOOKING FROM CA | 240315803002529           | 0.00  | \$2,900.00 |
| 12 Mar 2024  | OVERBOOKING FROM SA | 240312803005208           | 0.00  | 120,000.00 |

[View All >](#)

### Portfolio Accounts

Assets Liabilities

IDR

100.00%

Total Assets **IDR 25,061,629,677.72** Total Liabilities **IDR 0.00**

Current Account (3) **25,061,629,677.72**

[View All Accounts >](#)

### Top Beneficiary

No Records Found

### Daily Cut-Off Time

Product Type Start

No Records Found

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

### Task List

| Product / Function                                       | Reference No.       | Value Date | Amount   | Status           |
|----------------------------------------------------------|---------------------|------------|----------|------------------|
| <a href="#">User Status and Secure Token Maintenance</a> | (15740118000001474  | -          | IDR 0.00 | Pending Approval |
| <a href="#">Manage Notifications</a>                     | (172402270000000385 | -          | IDR 0.00 | Pending Approval |

[Go to Task list >](#)

### Announcement & Promotion

TEST NO EXPIRED <img src=x onerror=alert(sessionStorage.getItem('LoginContext'))>

AD - UAT Test

testttt

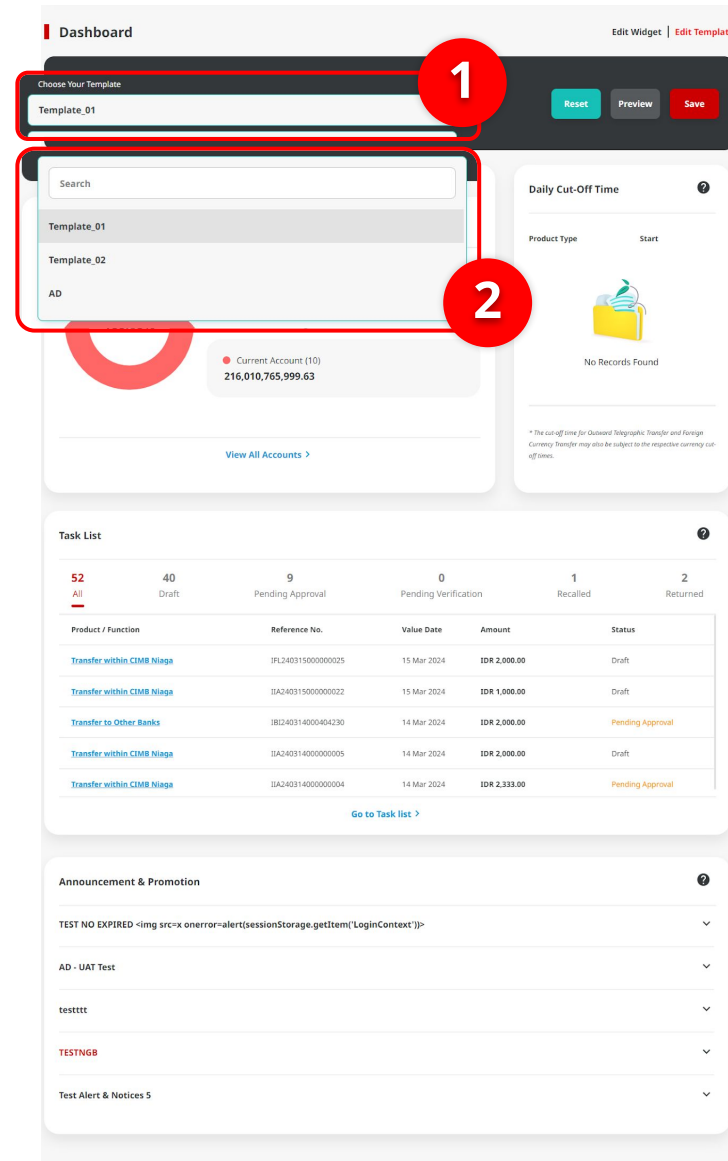
TESTNGB

Test Alert & Notices 5

Sistem akan menampilkan halaman ***Dashboard***

**1**

Klik ***Edit Widget***



System akan menampilkan halaman **Edit**

1 Klik **Select Template Dropdown List**

2 Pilih **Template** jika terdapat **opsi lain yang tersedia**



**Dashboard** [Edit Widget](#) [Edit Template](#)

Choose Your Template

Template\_02

[Reset](#) [Preview](#) **1**

### Portfolio Accounts

**Assets** Liabilities

IDR

100.00%

Total Assets ⓘ  
IDR 216,010,765,999.63

Total Liabilities ⓘ  
IDR 0.00

● Current Account (10)  
216,010,765,999.63

[View All Accounts >](#)

### Daily Cut-Off Time

Product Type Start



No Records Found

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

### Task List

52 All 40 Draft 9 Pending Approval 0 Pending Verification 1 Recalled 2 Returned

| Product / Function                         | Reference No.      | Value Date  | Amount       | Status           |
|--------------------------------------------|--------------------|-------------|--------------|------------------|
| <a href="#">Transfer within CIMB Niaga</a> | IFL240315000000025 | 15 Mar 2024 | IDR 2,000.00 | Draft            |
| <a href="#">Transfer within CIMB Niaga</a> | IIA240315000000022 | 15 Mar 2024 | IDR 1,000.00 | Draft            |
| <a href="#">Transfer to Other Banks</a>    | IBI240314000404230 | 14 Mar 2024 | IDR 2,000.00 | Pending Approval |
| <a href="#">Transfer within CIMB Niaga</a> | IIA240314000000005 | 14 Mar 2024 | IDR 2,000.00 | Draft            |
| <a href="#">Transfer within CIMB Niaga</a> | IIA240314000000004 | 14 Mar 2024 | IDR 2,333.00 | Pending Approval |

[Go to Task list >](#)

**1**

Klik tombol **Preview** untuk melihat **Dashboard**

1

Dashboard

Portfolio Accounts

Assets

Liabilities

100.00%

Total Assets

IDR 216,010,765,999.63

Total Liabilities

IDR 0.00

Current Account (10)

216,010,765,999.63

View All Accounts >

Daily Cut-Off Time

Product Type

Start

No Records Found

Task List

52

40

9

0

1

2

All

Draft

Pending Approval

Pending Verification

Recalled

Returned

| Product / Function                         | Reference No.      | Value Date  | Amount       | Status           |
|--------------------------------------------|--------------------|-------------|--------------|------------------|
| <a href="#">Transfer within CIMB Niaga</a> | 3PL240315000000025 | 15 Mar 2024 | IDR 2,000.00 | Draft            |
| <a href="#">Transfer within CIMB Niaga</a> | 3A240315000000022  | 15 Mar 2024 | IDR 1,000.00 | Draft            |
| <a href="#">Transfer to Other Banks</a>    | 3B240314000404230  | 14 Mar 2024 | IDR 2,000.00 | Pending Approval |
| <a href="#">Transfer within CIMB Niaga</a> | 3A240314000000005  | 14 Mar 2024 | IDR 2,000.00 | Draft            |
| <a href="#">Transfer within CIMB Niaga</a> | 3A240314000000004  | 14 Mar 2024 | IDR 2,333.00 | Pending Approval |

Go to Task list >

Announcement & Promotion

TEST NO EXPIRED

AD - UAT Test

testttt

TESTNGB

Test Alert & Notices 5

Transaction History

Transaction Activity

Incoming Transaction

Account

703200963800-IDR-ANGIN TOLAK

| Posting Date | Payment Type      | Sender / Beneficiary Name | Debit    | Credit |
|--------------|-------------------|---------------------------|----------|--------|
| 18 Mar 2024  | OVERBOOKING TO CA | 240318BIB3005256          | 1,000.00 | 0.00   |
| 14 Mar 2024  | TR TO REMITT      | 240314BIB1658791          | 2,000.00 | 0.00   |
| 14 Mar 2024  | TR TO REMITT      | 240314BIB1658787          | 1,000.00 | 0.00   |

View All >

Top Beneficiary

No Records Found

2

Ok

1 Sistem akan menampilkan **Pop-up preview template**

2 Klik **OK** untuk menutup **preview Box**

Dashboard

Edit Widget | Edit Template

Choose Your Template

Template 02

Reset

Preview

Save

Portfolio Accounts

Assets Liabilities

IDR

100.00%

Total Assets  
IDR 216,010,765,999.63

Total Liabilities  
IDR 0.00

Current Account (10)  
216,010,765,999.63

View All Accounts >

Daily Cut-Off Time

Product Type Start

No Records Found

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

Task List

52 All 40 Draft 9 Pending Approval 0 Pending Verification 1 Recalled 2 Returned

| Product / Function                         | Reference No.      | Value Date  | Amount       | Status           |
|--------------------------------------------|--------------------|-------------|--------------|------------------|
| <a href="#">Transfer within CIMB Niaga</a> | JFL240315000000025 | 15 Mar 2024 | IDR 2,000.00 | Draft            |
| <a href="#">Transfer within CIMB Niaga</a> | IJA240315000000022 | 15 Mar 2024 | IDR 1,000.00 | Draft            |
| <a href="#">Transfer to Other Banks</a>    | IBI240314000404230 | 14 Mar 2024 | IDR 2,000.00 | Pending Approval |
| <a href="#">Transfer within CIMB Niaga</a> | IJA240314000000005 | 14 Mar 2024 | IDR 2,000.00 | Draft            |
| <a href="#">Transfer within CIMB Niaga</a> | IJA240314000000004 | 14 Mar 2024 | IDR 2,333.00 | Pending Approval |

Go to Task list >

Save

Are you sure you want to save the layout?

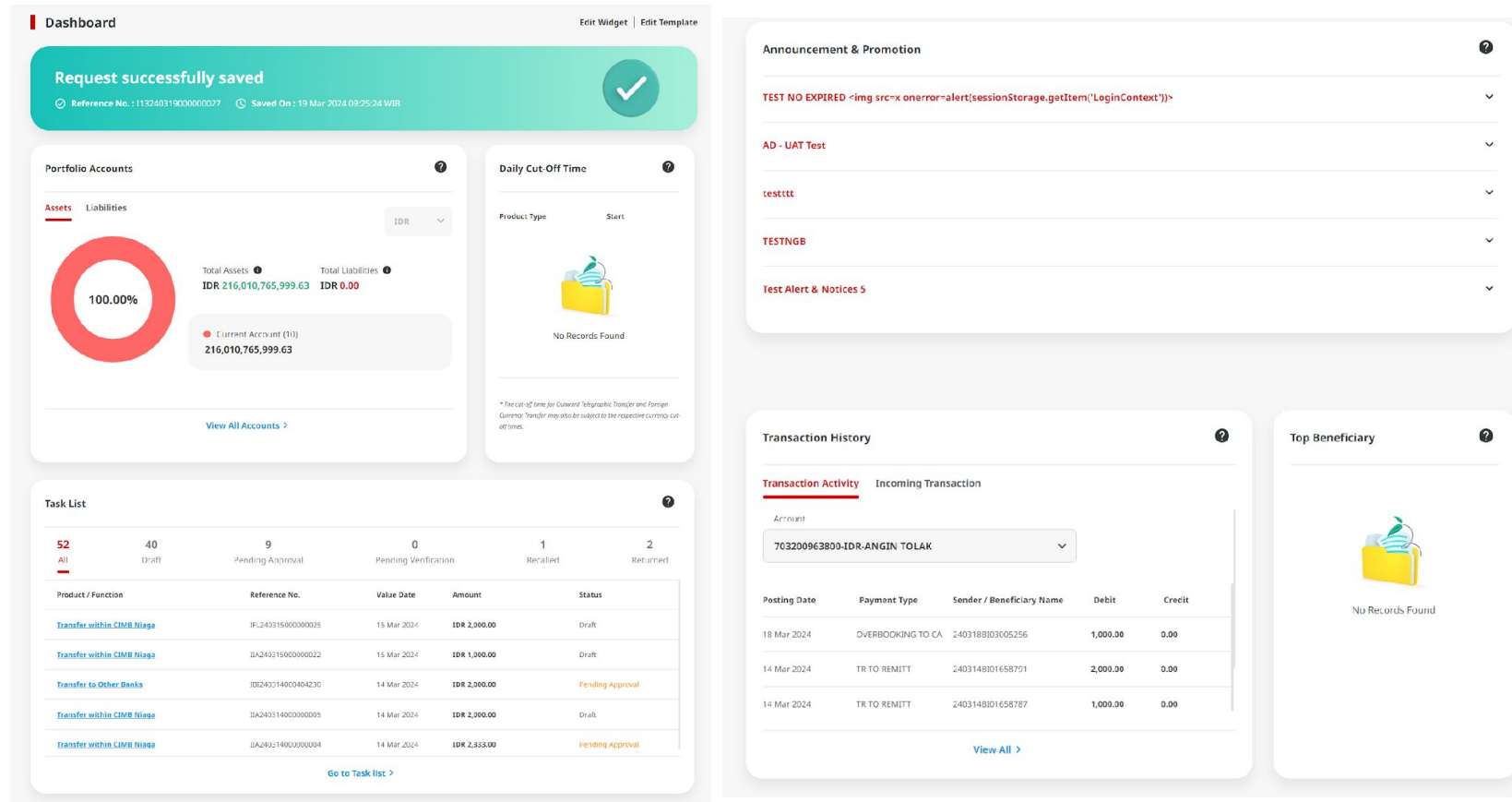
No

Yes

System akan kembali mengarahkan ke halaman **User Dashboard**

1 Klik **Save**

2 Klik **Yes**



Sistem akan menampilkan halaman **Dashboard** dengan pesan **Acknowledgement**



**OCTO** Biz  
BY  **CIMB NIAGA**

