

The OCTO Biz logo is prominently displayed in the center-right. 'OCTO' is in a large, bold, white, sans-serif font, and 'Biz' is in a smaller, white, sans-serif font to its right.

Portfolio Summary

Account Statement

Website

TUTORIALOCTOBIZ2025

KEJAR MIMPI

Portfolio Summary

Account Statement

Account & Dashboard - Account Statement berfungsi untuk memeriksa Portfolio harian akun spesifik nasabah

Account & Dashboard - Account Statement berfungsi untuk memeriksa Portfolio harian akun spesifik nasabah



- 1 Kunjungi Website OCTO Biz di:
www.octobiz.co.id

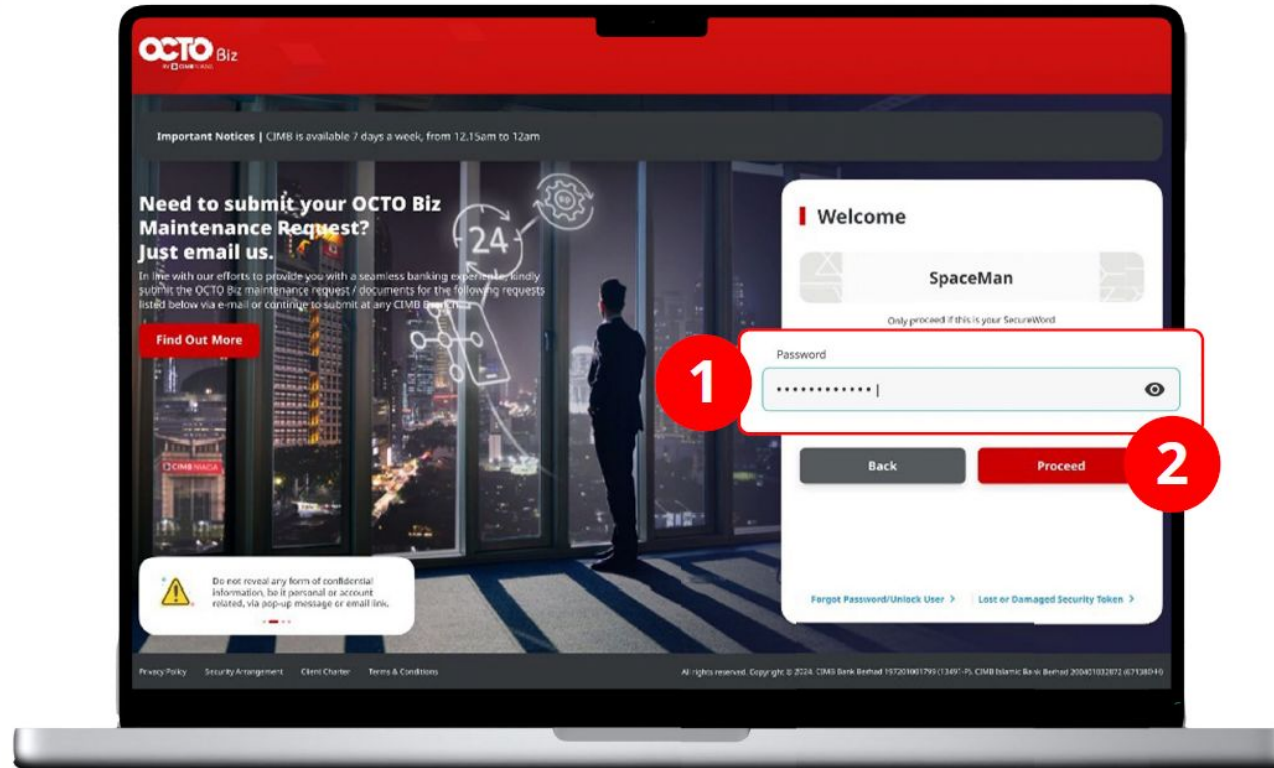
Visit OCTO Biz website on:
www.octobiz.co.id

- 2 Masuk dengan menggunakan
User & Company ID

Login using **User & Company ID**

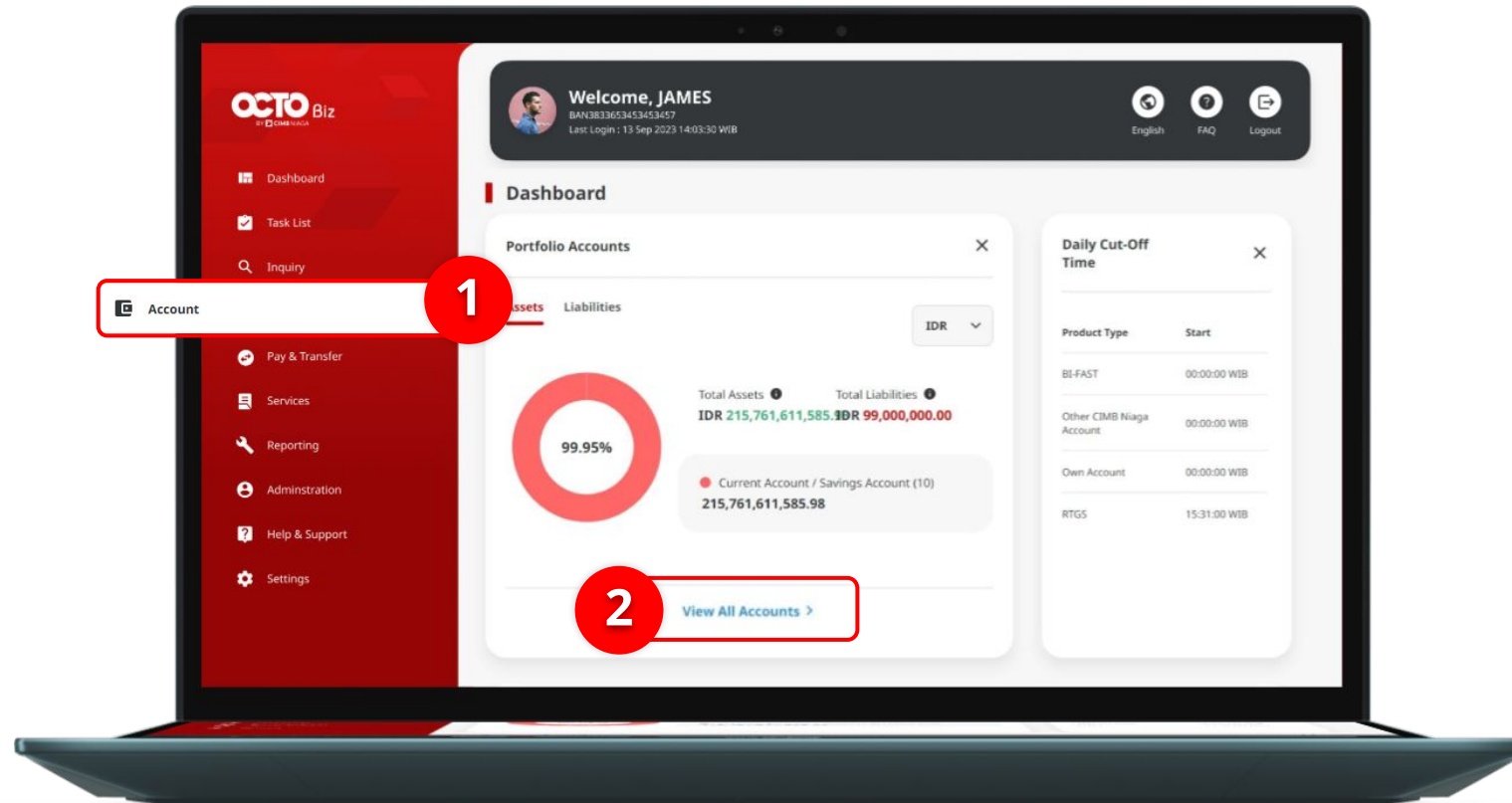
- 3 Klik **Next**

Click **Next**



1 Isi **Password**
Input **Password**

2 Klik **Proceed**
Click **Proceed**



Sistem akan menampilkan halaman **Dashboard**

System will show **Dashboard** page

1 Klik **Account** pada side menu

Click **Account** on side menu

2 Atau Klik **View All Account** pada **Portfolio Summary**

Or click the **View All Account** button on **Portfolio Summary**

The screenshot displays the OCTO Biz Account Statement interface. At the top, the breadcrumb navigation shows 'Overview > Current Account / Saving Account > Account Details & Transaction History'. A red circle with the number '1' highlights the 'Current Account / Saving Account' tab. Below this, the account details section shows the account number '703181949700-IDR-MDJ' and the ledger balance 'IDR 362,551.48'. The transaction history section is highlighted with a red box and a red circle with the number '2'. It includes filters for 'View By' (Date Range, Month) and a 'Search' button. Below the filters, a table of transactions is shown with columns: Post Date, Value Date, Payment Type, Other Reference, Bank Reference, Debit Amount, Credit Amount, and Balance. A red circle with the number '3' highlights the 'Download' button at the bottom right of the table.

Post Date	Value Date	Payment Type	Other Reference	Bank Reference	Debit Amount	Credit Amount	Balance
02 Oct 2023	02 Oct 2023	STAMP DUTY STATEMENT	DD4400095000013		IDR 3,000.00	IDR 0.00	IDR 362,551.48
01 Oct 2023	01 Oct 2023	STAMP DUTY STATEMENT	DD4400095000014		IDR 3,000.00	IDR 0.00	IDR 359,551.48

Sistem akan menampilkan halaman **Account**

1 Pilih **Current Account/ Saving Account Tab**

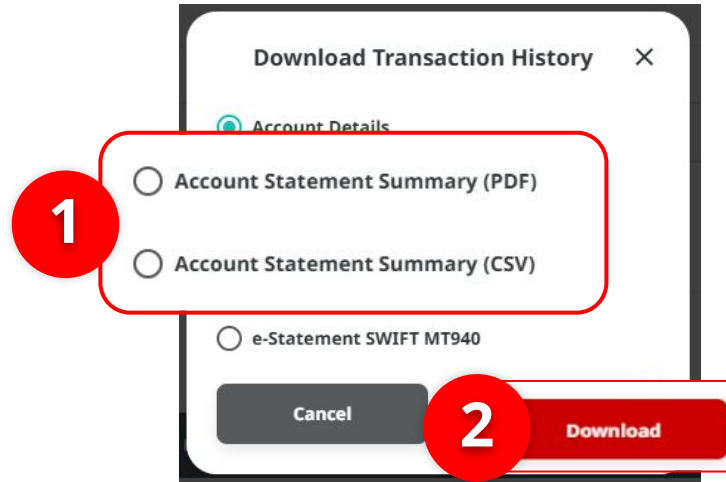
Choose **Current Account/ Saving Account tab**

2 Pilih **Periode Transaksi**, klik **Search**

Choose **Transaction Period**, click **Search**

3 Klik **Download** untuk **download riwayat**

Click **Download** to **download account history**



1 Pilih **Jenis Summary**

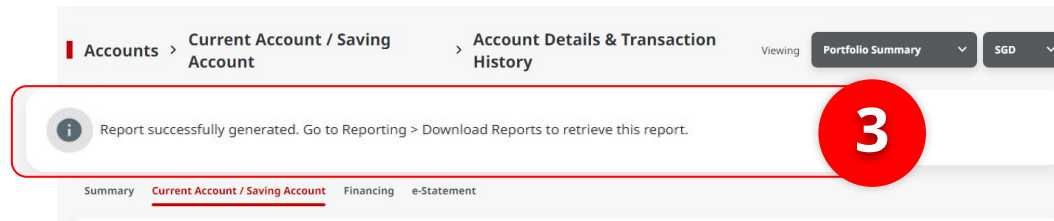
*Choose **summary type***

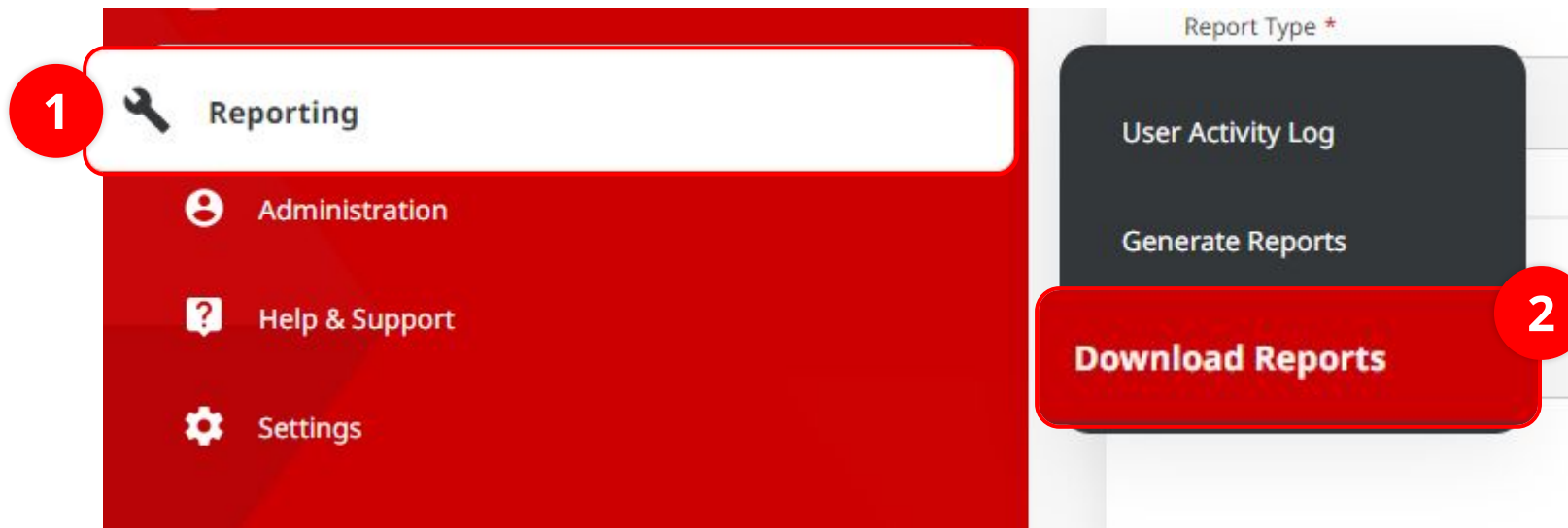
2 Klik tombol **Download**

*Click **Download***

3 Sistem akan menampilkan **Notifikasi Acknowledgement**

*System will show the **Acknowledgement notification pop up***





- 1 Arahkan kursor ke **Reporting**

*Navigate to
Reporting*

- 2 Klik **Download Reports**

*Click Download
Reports*

Download Reports > Inquiry & Listing

Search

Company ID
BIZ030370RIZ

Report Type *
Portfolio

Report Name
Select

File Type
Select

Account Number
Select

Report Date *
27 Nov 2025

To
28 Nov 2025

Created By
Select

2 Search

Sistem akan menampilkan halaman ***Inquiry & Listing***

*System will show the **Inquiry & Listing** page*

1 Pilih ***portfolio*** sebagai ***Report Type***

*Choose **Transaction** as **Report Type***

2 Klik ***Search***

*Click **Search***

Listing

☐	Report Type ▾	Report Name ▾	File Type ▾	Account No. ▾	Report Date / Timestamp ▾	File Size ▾	Created By ▾
☐	Portfolio	Account Detail	PDF	-	28 Nov 2025 17:40:46 WIB	16.42 KB	rizkavntg
☒	Portfolio	Account Statement Summary	PDF	-	28 Nov 2025 17:39:49 WIB	24.50 KB	rizkavntg

Download

Sistem akan menampilkan **Listing**

System will show Listing

1 Pilih **Report**

Choose Report

2 Klik **Download**

Click Download



OCTO Biz
BY  **CIMB NIAGA**

