

OCTO Biz

Account & Dashboard

Dashboard

TUTORIALOCTOBIZ2025

KEJAR MIMPI

Account & Dashboard

Dashboard

Account & Dashboard – Dashboard berfungsi untuk **memeriksa akun *Edit Template*** pada Portfolio

Account & Dashboard - Dashboard is used to check account and the template can be edited on portfolio

03

Dashboard

12

Personalized
Dashboard

Dashboard

Dashboard



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

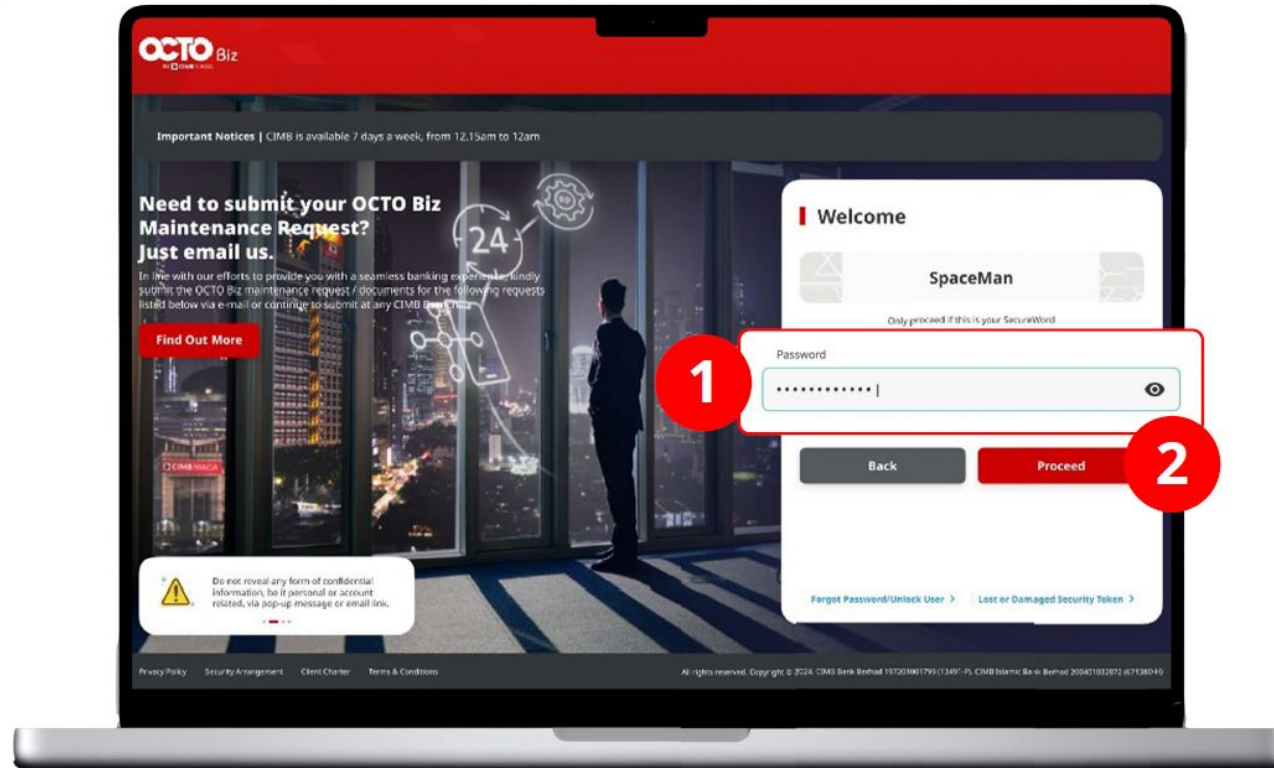
Visit OCTO Biz website:
www.octobiz.co.id

- 2 Masuk dengan menggunakan
User & Company ID

Login using **User & Company ID**

- 3 Klik **Next**

Click **Next**

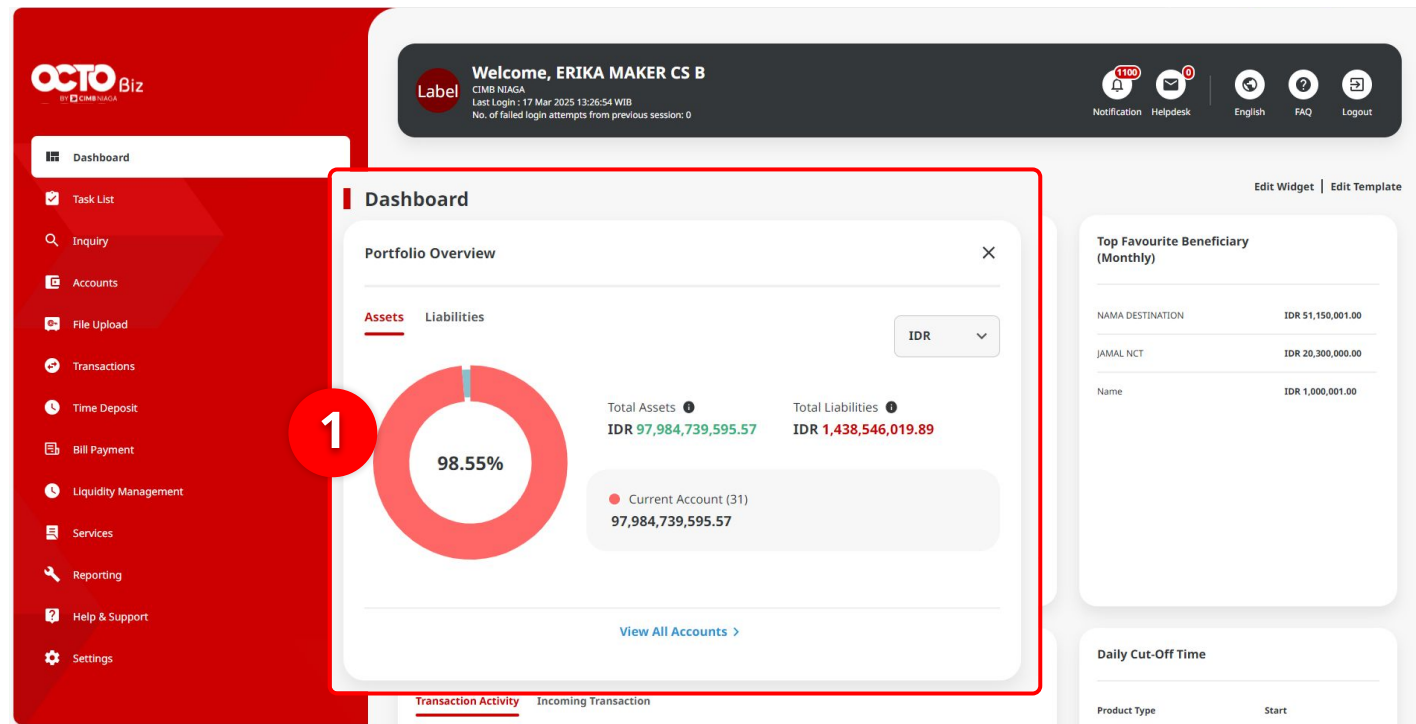


1 Isi **Password**

Input **Password**

2 Klik **Proceed**

Click **Proceed**

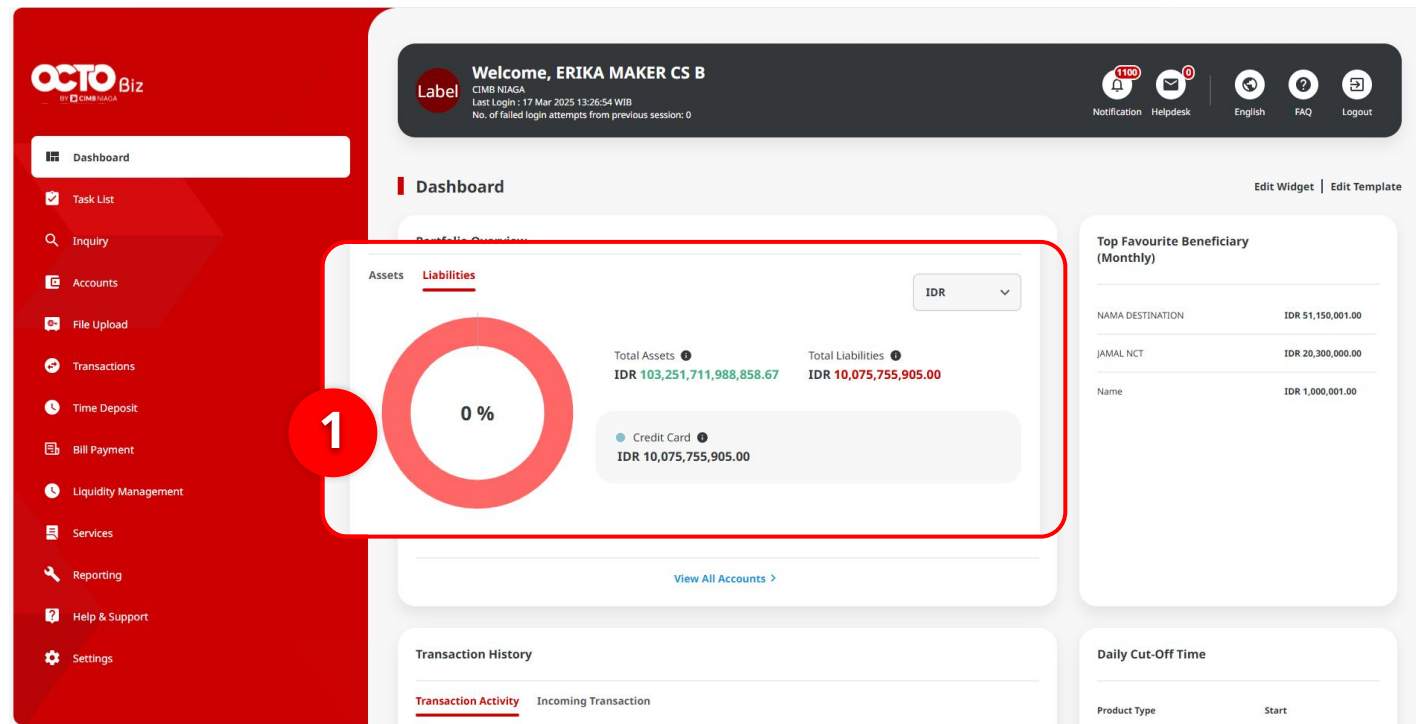


Sistem akan menampilkan halaman **Dashboard**

System will show the **Dashboard** page

- 1 Sistem akan secara otomatis menampilkan **Portfolio Overview** bagian **Assets**

System will automatically show the **Portfolio Overview Assets** part

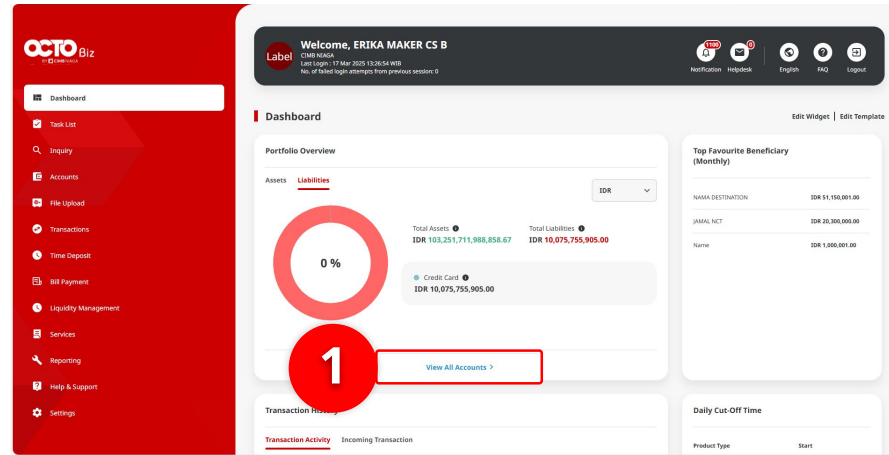


Sistem akan menampilkan halaman **Dashboard**

System will show the **Dashboard** page

1 Klik **Liabilities**, untuk melihat **overview**

Click **Liabilities** to see the **overview**

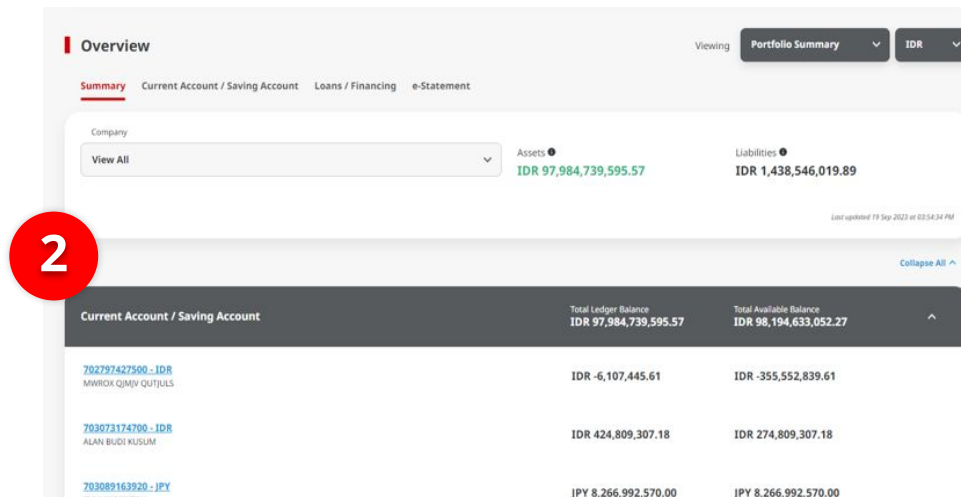


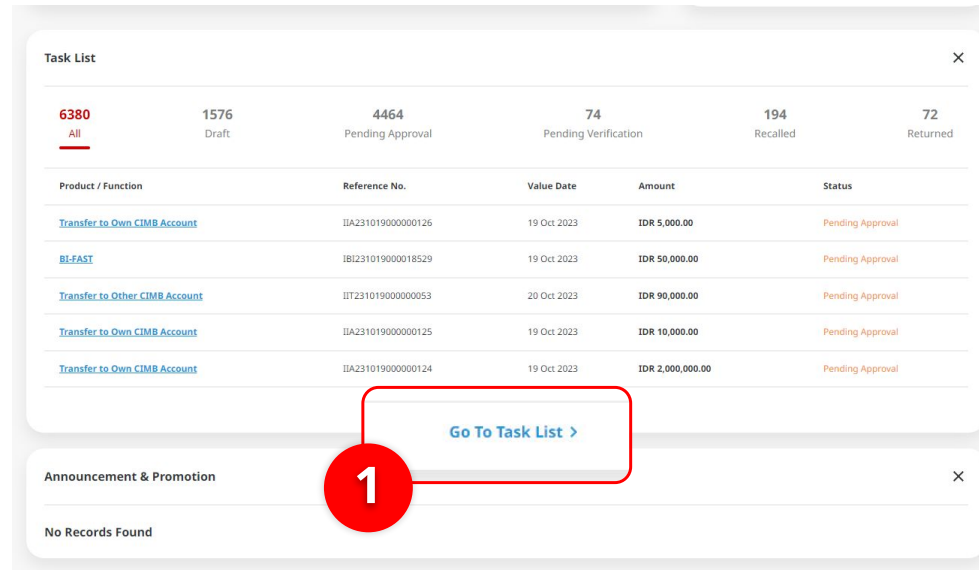
1 Klik **View All Accounts**

*Click **View All Accounts***

2 Sistem akan menampilkan **overview account** dalam bentuk **listing**

*System will show **listing of Account overview***



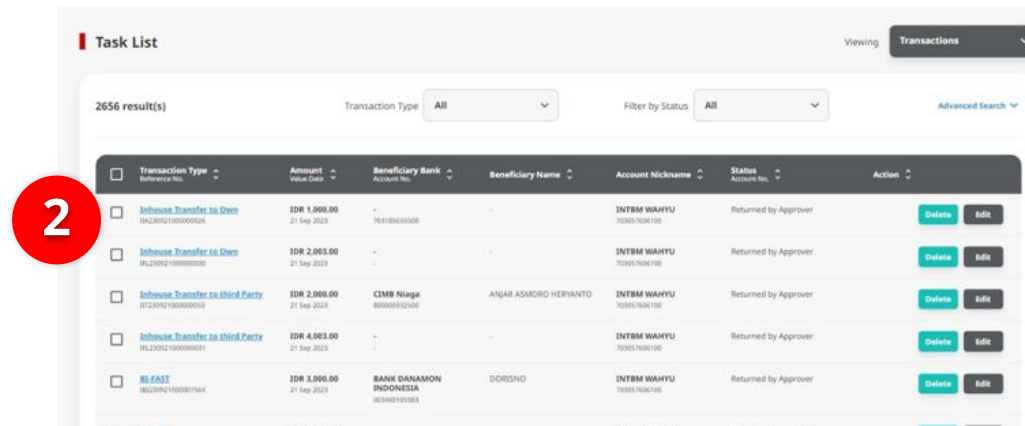


Untuk melihat *Task list* melalui *dashboard*

To see the *Task List* through *Dashboard*

- 1 Scroll kebawah, sistem akan menampilkan **task list widget**. Klik **Go to Task list** untuk menuju halaman **Task List**

Scroll down, system will show the **Task List widget**. Click **Go to Task List** to go to **Task List page**



- 2 Sistem akan menampilkan halaman **Task List**

System will show the **Task List Page**

Daily Cut-Off Time

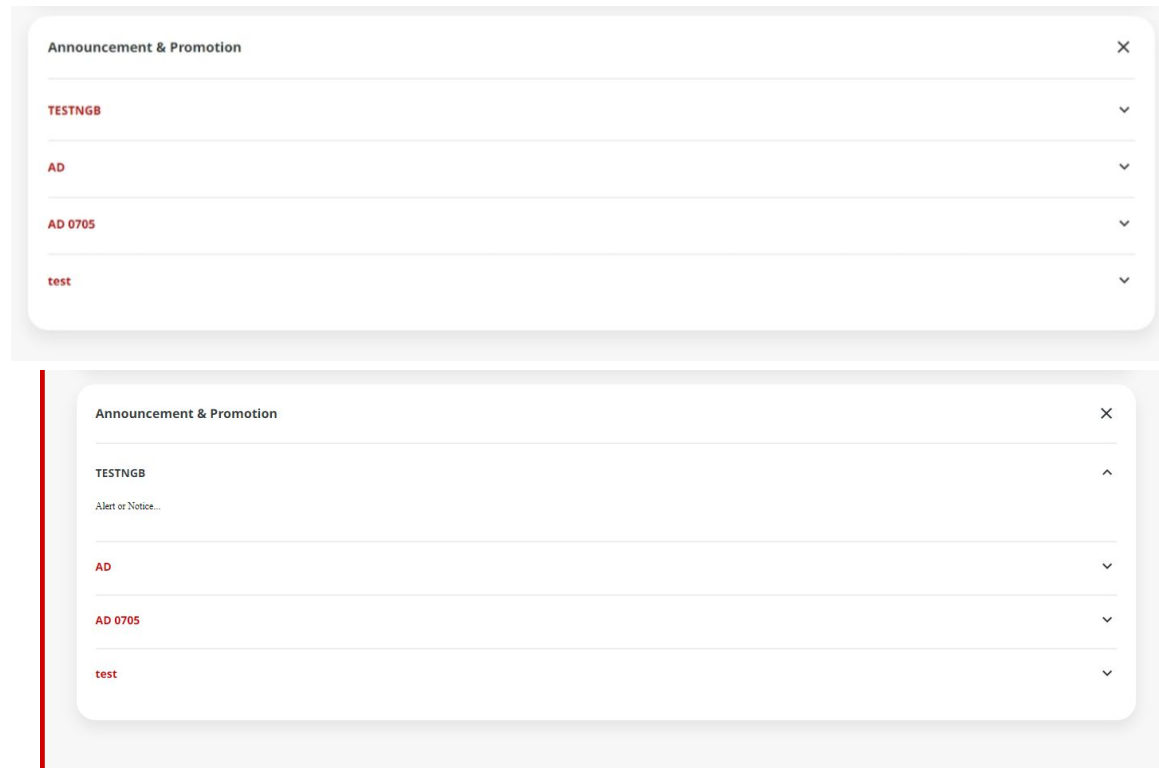
×

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.

Untuk melihat **Daily Cut off time** per **produk** melalui *dashboard*

*To see **Daily Cut Off Time** for each **product** through Dashboard*



Untuk melihat **Informasi dan pengumuman** melalui *dashboard*

To see the **Information and announcement** through *Dashboard*

Account

Personalized Dashboard

Edit Widget

Edit Template

Account

Personalized Dashboard

Edit Widget



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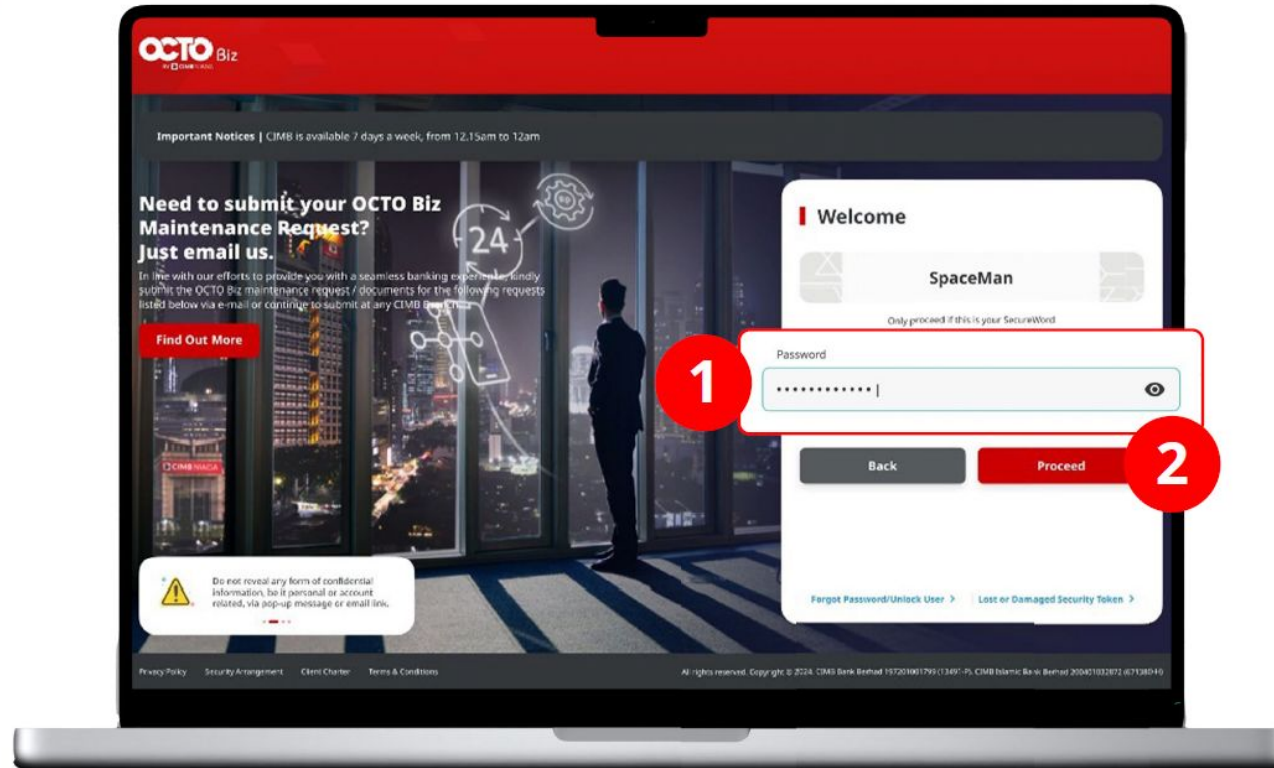
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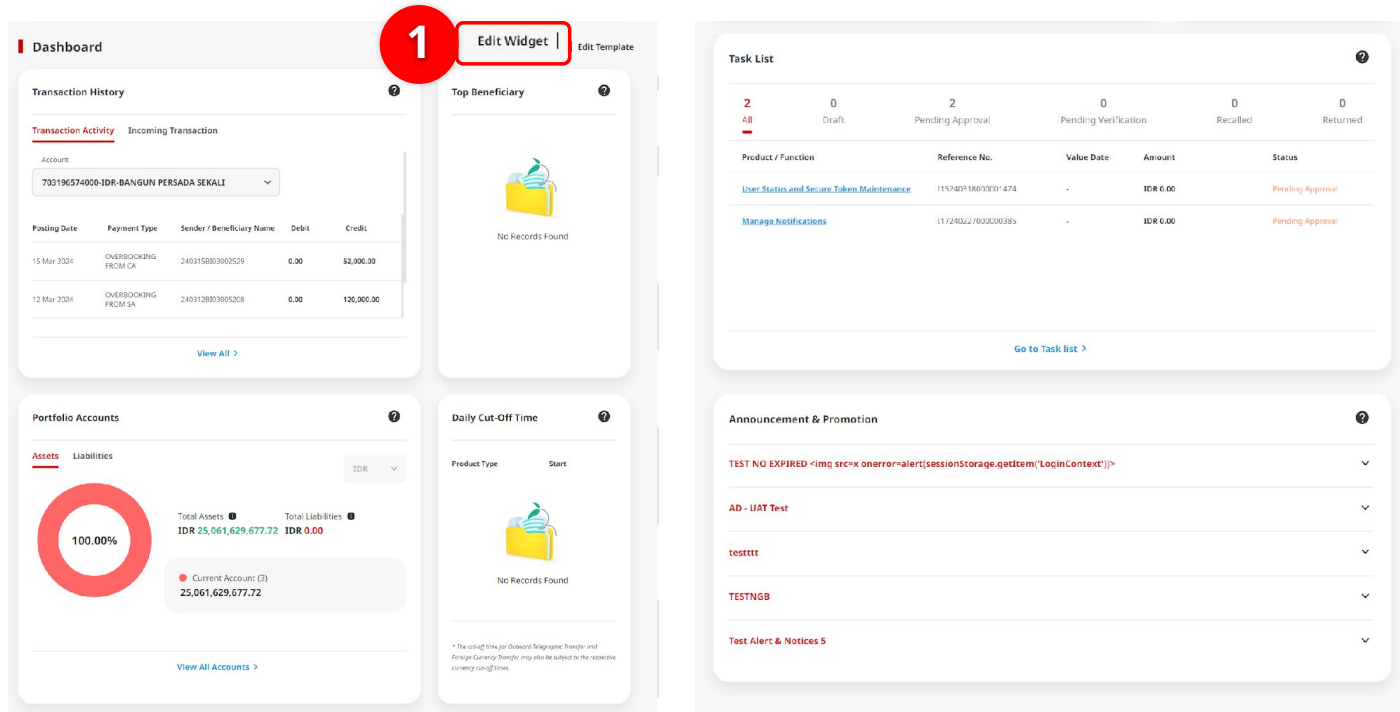


1 Isi **Password**

Input **Password**

2 Klik **Proceed**

Click **Proceed**

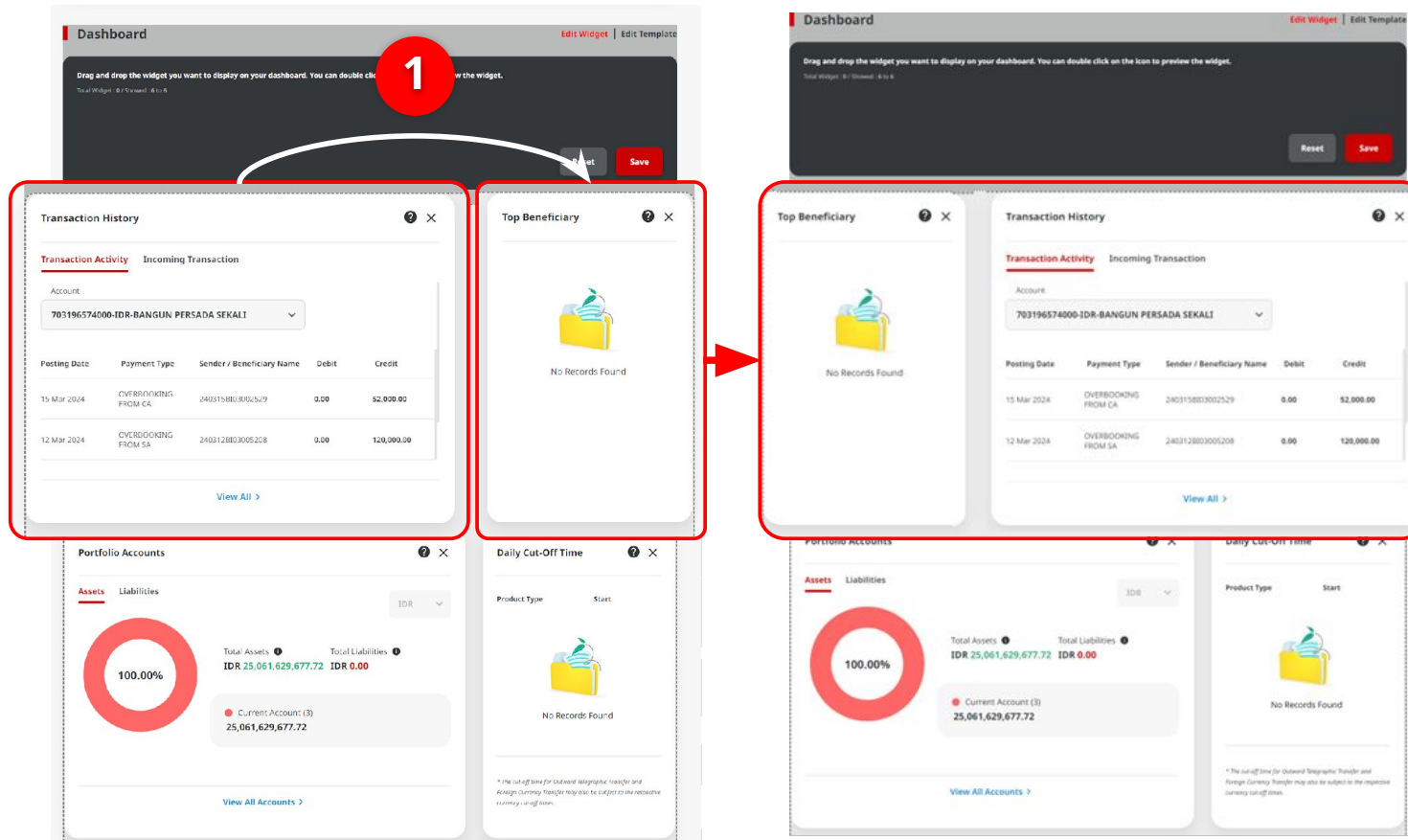


Sistem akan **menampilkan halaman Dashboard**

System will show the **Dashboard page**

1 Scroll kebawah, Klik **Edit Widget**

Scroll down, click **Edit Widget**

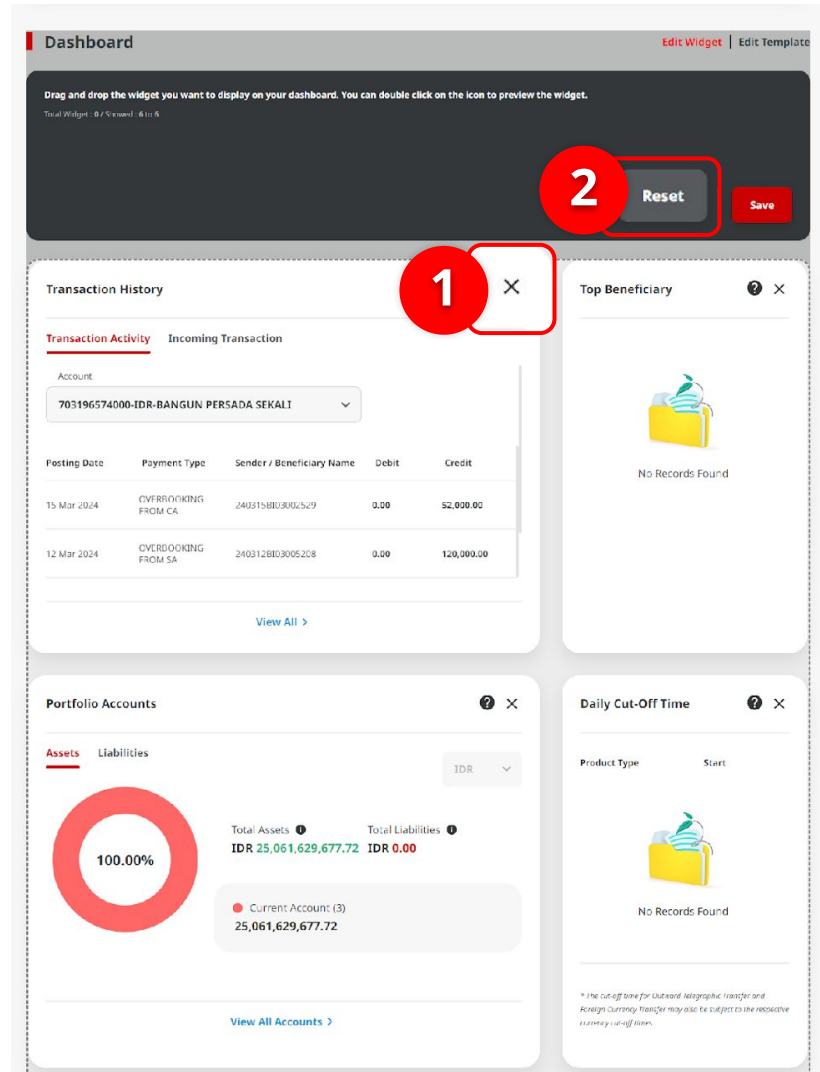


System akan menampilkan halaman **Edit Dashboard**

System will show the **Edit Dashboard** page

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

User can move the **widget** to **Dashboard**



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

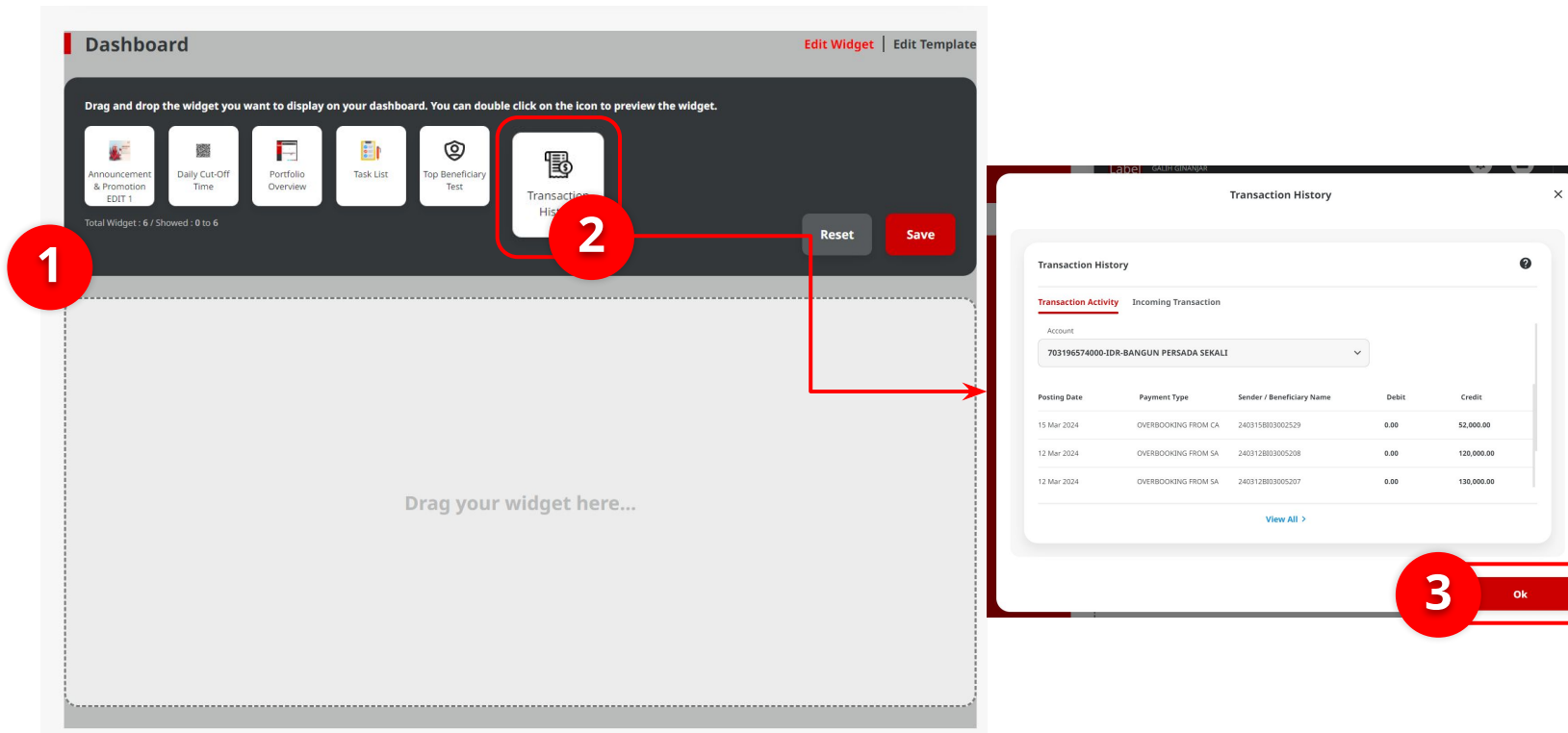
*Click to **Delete** the widget from Dashboard*

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

*User can **Reset** the default settings using **Reset** button*

LANGKAH

06



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

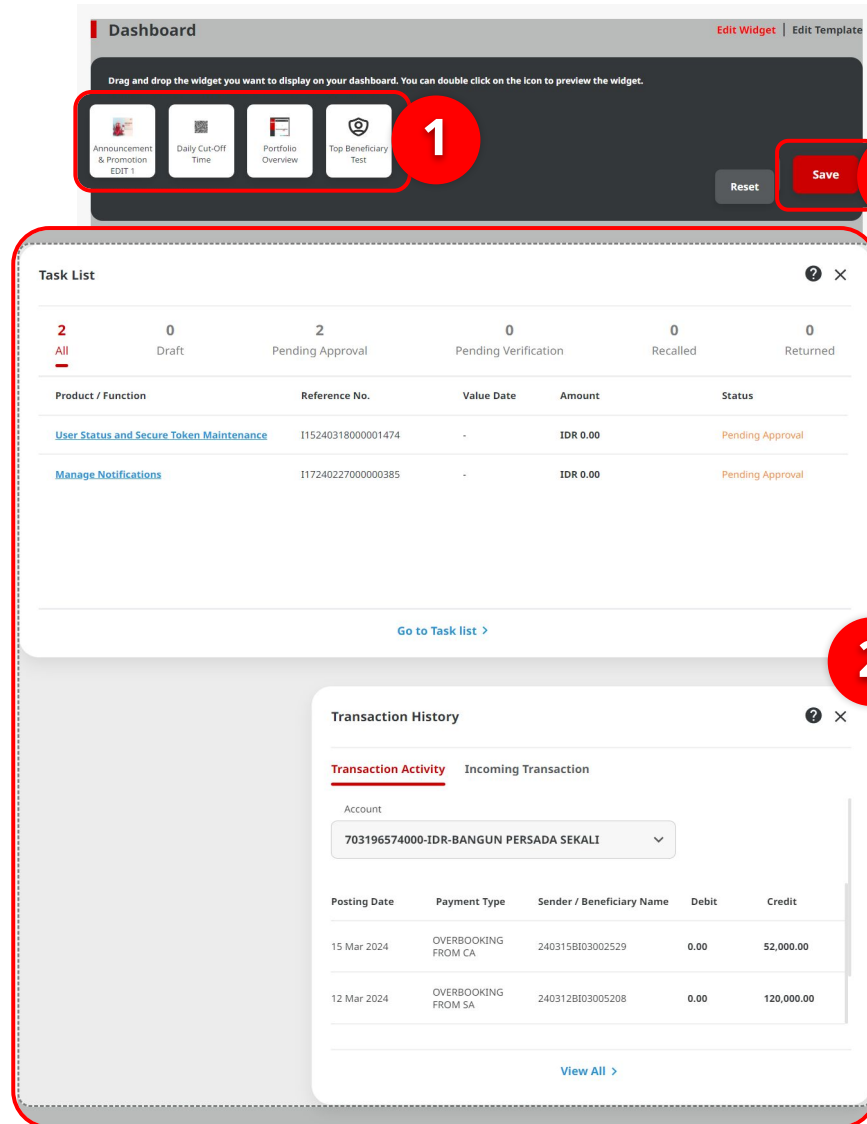
*Widget that **already deleted**, will **automatically saved** above the **Dashboard** page*

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

*Double click to see the **Preview widget***

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

*Click **OK** to close the **preview lightbox***



1 Widget dapat dipindahkan ke **Dashboard** dibawah

Widget can be move to bottom side of Dashboard

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

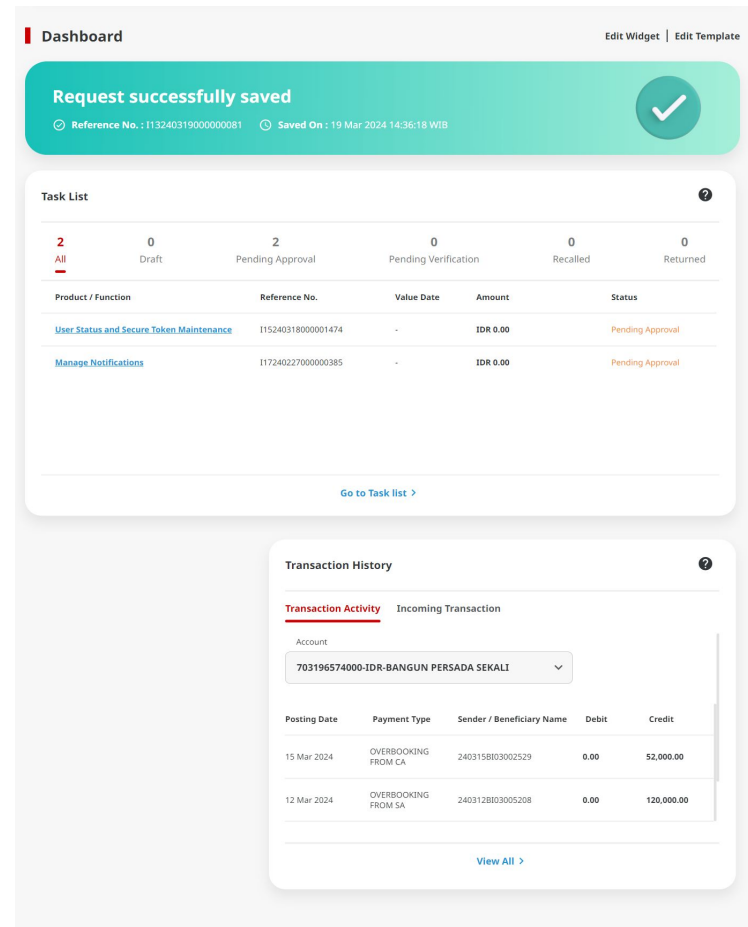
For example the Task List & Transaction History

3 Klik **Save**

Click Save

4 Klik **Yes**

Click Yes



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

*System will show the **Dashboard** with the **Acknowledgement pop up***

Account

Personalized Dashboard

Edit Template



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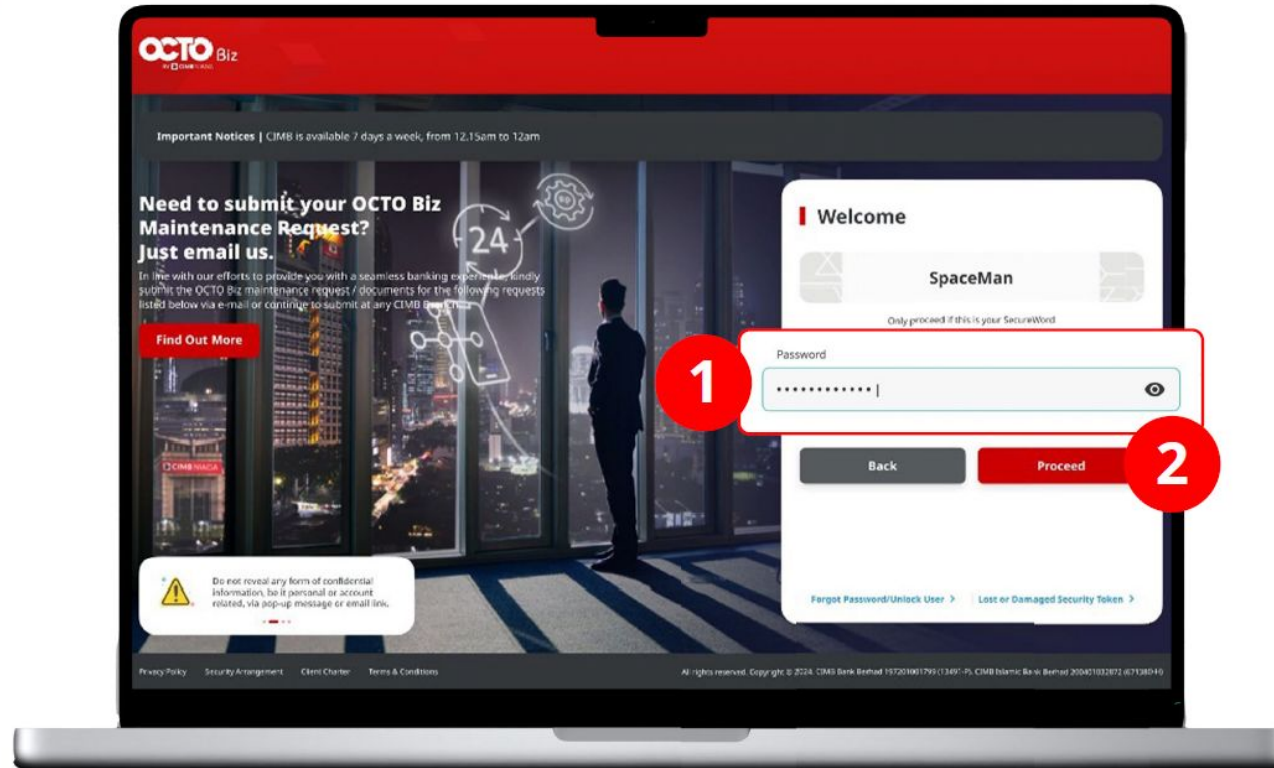
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Click **Next**



1 Isi **Password**

Input **Password**

2 Klik **Proceed**

Click **Proceed**

The screenshot displays the OCTOBiz Dashboard interface. At the top, there's a header with 'Dashboard' and an 'Edit Template' button, which is highlighted with a red circle and the number '1'. The dashboard contains several widgets:

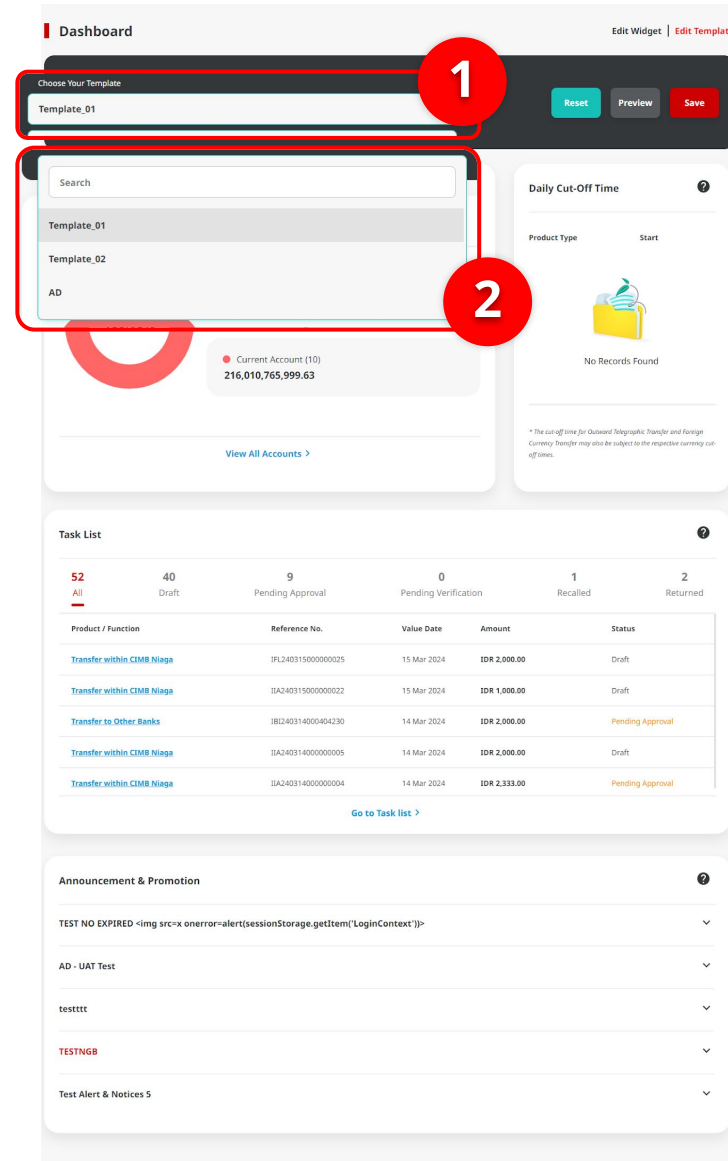
- Transaction History:** Shows a table of transactions with columns for Posting Date, Payment Type, Sender / Beneficiary Name, Debit, and Credit. It includes a dropdown for 'Account' and a 'View All' link.
- Portfolio Accounts:** Features a donut chart showing '100.00%' and a table of assets and liabilities. It includes a 'View All Accounts' link.
- Top Beneficiary:** A section with a folder icon and the text 'No Records Found'.
- Daily Cut-Off Time:** Another section with a folder icon and the text 'No Records Found'.
- Announcement & Promotion:** A section with a list of announcements and promotions, each with a dropdown arrow.

Sistem akan menampilkan halaman **Dashboard**

System will show the **Dashboard page**

1 Scroll kebawah, Klik **Edit Template**

Scroll down, click **Edit Template**



System akan menampilkan halaman **Edit**

System will show the **Edit** page

1 Klik **Select Template Dropdown List**

Click **Select Template Dropdown list**

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

Choose **Template** if there are more than one template option

Dashboard

Edit Widget | Edit Template

Choose Your Template

Template_02

Reset

Preview

Portfolio Accounts

Assets Liabilities

IDR

100.00%

Total Assets 1
IDR 216,010,765,999.63

Total Liabilities 1
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
Transfer within CIMB Niaga	IFL240315000000025	15 Mar 2024	IDR 2,000.00	Draft
Transfer within CIMB Niaga	IJA240315000000022	15 Mar 2024	IDR 1,000.00	Draft
Transfer to Other Banks	IBI240314000404230	14 Mar 2024	IDR 2,000.00	Pending Approval
Transfer within CIMB Niaga	IJA240314000000005	14 Mar 2024	IDR 2,000.00	Draft
Transfer within CIMB Niaga	IJA240314000000004	14 Mar 2024	IDR 2,333.00	Pending Approval

Go to Task list >

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

Click **Preview** to see the **Dashboard**

1

Dashboard

Preview Template

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

* 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
Transfer within CIMB Niaga	12L240315000000025	15 Mar 2024	IDR 2,000.00	Draft
Transfer within CIMB Niaga	12A240315000000022	15 Mar 2024	IDR 1,000.00	Draft
Transfer to Other Banks	12B2403140000404230	14 Mar 2024	IDR 2,000.00	Pending Approval
Transfer within CIMB Niaga	12A240314000000005	14 Mar 2024	IDR 2,000.00	Draft
Transfer within CIMB Niaga	12A240314000000004	14 Mar 2024	IDR 2,333.00	Pending Approval

Go to Task List >

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	2403188803005256	1,000.00	0.00
14 Mar 2024	TR TO REMITT	2403148801658791	2,000.00	0.00
14 Mar 2024	TR TO REMITT	2403148801658787	1,000.00	0.00

View All >

Top Beneficiary

No Records Found

2 Ok

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

System will show the **Preview Template** pop up

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

Click **OK** to close the **Preview Box**

Dashboard
Edit Widget | Edit Template

Choose Your Template
Template_02
Reset Preview Save

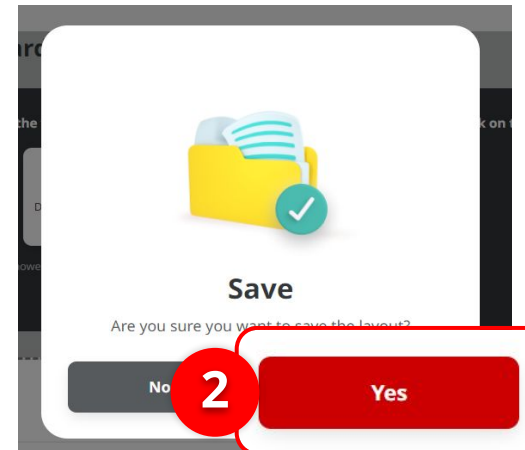
Portfolio Accounts
Assets Liabilities
100.00%
Total Assets IDR 216,010,765,999.63
Total Liabilities IDR 0.00
Current Account (10) 216,010,765,999.63
View All Accounts >

Daily Cut-Off Time
Product Type Start
No Records Found

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

Product / Function	Reference No.	Value Date	Amount	Status
Transfer within CIMB Niaga	IPL240315000000025	15 Mar 2024	IDR 2,000.00	Draft
Transfer within CIMB Niaga	IIA240315000000022	15 Mar 2024	IDR 1,000.00	Draft
Transfer to Other Banks	IBI240314000404230	14 Mar 2024	IDR 2,000.00	Pending Approval
Transfer within CIMB Niaga	IIA240314000000005	14 Mar 2024	IDR 2,000.00	Draft
Transfer within CIMB Niaga	IIA240314000000004	14 Mar 2024	IDR 2,333.00	Pending Approval

Go to Task list >



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

System will show **User Dashboard** page

1 Klik **Save**

Click **Save**

2 Klik **Yes**

Click **Yes**

Dashboard

Request successfully saved
Reference No.: 113240319000000027 Saved On: 19 Mar 2024 09:25:24 WIB

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

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

Task List

Product / Function	Reference No.	Value Date	Amount	Status
Transfer within CIMB Niaga	IF-2403150000000025	15 Mar 2024	IDR 2,000.00	Draft
Transfer within CIMB Niaga	IA2403150000000022	15 Mar 2024	IDR 1,000.00	Draft
Transfer to Other Banks	ID0240314000404230	14 Mar 2024	IDR 2,000.00	Pending Approval
Transfer within CIMB Niaga	IA2403140000000005	14 Mar 2024	IDR 2,000.00	Draft
Transfer within CIMB Niaga	IA2403140000000004	14 Mar 2024	IDR 2,333.00	Pending Approval

[Go to Task list >](#)

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	240318BID03005256	1,000.00	0.00
14 Mar 2024	TR TO REMITT	240314BID1658751	2,000.00	0.00
14 Mar 2024	TR TO REMITT	240314BID1658787	1,000.00	0.00

[View All >](#)

Top Beneficiary

No Records Found

Announcement & Promotion

TEST NO EXPIRED

AD - UAT Test

testttt

TESTINGB

Test Alert & Notices 5

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

System will show the **Dashboard** with the **Acknowledgement pop up**



OCTO Biz
BY  **CIMB NIAGA**

