

The OCTO Biz logo, with 'OCTO' in a large, bold, white sans-serif font and 'Biz' in a smaller, white sans-serif font.

SysAdmin

# Manage Company

Lite & Inquiry Package

TUTORIALOCTOBIZ2025

KEJAR MIMPI

**SysAdmin**

# Manage Company

**SysAdmin – Manage Company : CFO Administrator** dapat **mengatur Company Details, Account, dan user** melalui modul ini.

contoh: *Tagging New Account, pembuatan User Group dan User baru*

**SysAdmin - Manage Company:** Administrator can **manage the Company Details, Account, and user**

*E.g: Tagging New Account, create User Group, and New User*

| <b>Role</b>     | <b>Description</b>                                                                                                                                                                                                                                                                                                                                          |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Maker</b>    | User yang bertugas sebagai pembuat Transaksi atau peng-Input data Transaksi<br><i>Users who are tasked with creating transactions or inputting transaction data</i>                                                                                                                                                                                         |
| <b>Reviewer</b> | User yang berfungsi sebagai Reviewer untuk melakukan validasi data transaksi yang telah di submit oleh <b>Maker (Opsional)</b><br><i>Users who function as Reviewers to validate transaction data that has been submitted by Maker (Optional)</i>                                                                                                           |
| <b>Approver</b> | User yang bertugas untuk memberikan keputusan (Menolak atau menyetujui Transaksi) terhadap transaksi yang telah dikirim oleh <b>Maker</b> (Dapat diatur secara Berjenjang)<br><i>The user is responsible for making decisions (rejecting or approving transactions) regarding transactions that have been sent by the Maker (can be arranged in stages)</i> |
| <b>Releaser</b> | User yang berfungsi untuk memberikan keputusan yang sudah disetujui oleh Approver ( <b>Opsional</b> )<br><i>User whose function is to provide decisions that have been approved by the Approver (Optional)</i>                                                                                                                                              |
| <b>Viewer</b>   | User yang berfungsi untuk melihat Laporan Keuangan saja (Tidak dapat melakukan Transaksi)<br><i>Users whose function is to view Financial Reports only (Cannot make Transactions)</i>                                                                                                                                                                       |

| Accounts                 | Account type                                                                                                         | Segment                                                   | Remarks                                                                                                                   |
|--------------------------|----------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|
| Credit Card              | Credit Card                                                                                                          | Available for all customer segments                       | 1. Applicable for services below:<br>a. Retrieve Account by CIF No.<br><br>2. Not Applicable for Foreign Currency Account |
| Foreign Currency Account | <ul style="list-style-type: none"><li>• Current Accounts</li><li>• Saving accounts</li><li>• Loan Accounts</li></ul> | Available for OCTO Biz Inquiry and OCTO Biz Lite segments | 1. Applicable for services below:<br>a. Retrieve Account by CIF No.<br>b. Add accounts                                    |
| Time Deposit             |                                                                                                                      |                                                           | 2. Applicable for Foreign Currency Account                                                                                |

SysAdmin

# Manage Company

*Account Maintenance*

*Contact Info*

*User*

SysAdmin

# Manage Company

*Account Maintenance*

*Contact Info*

*User*



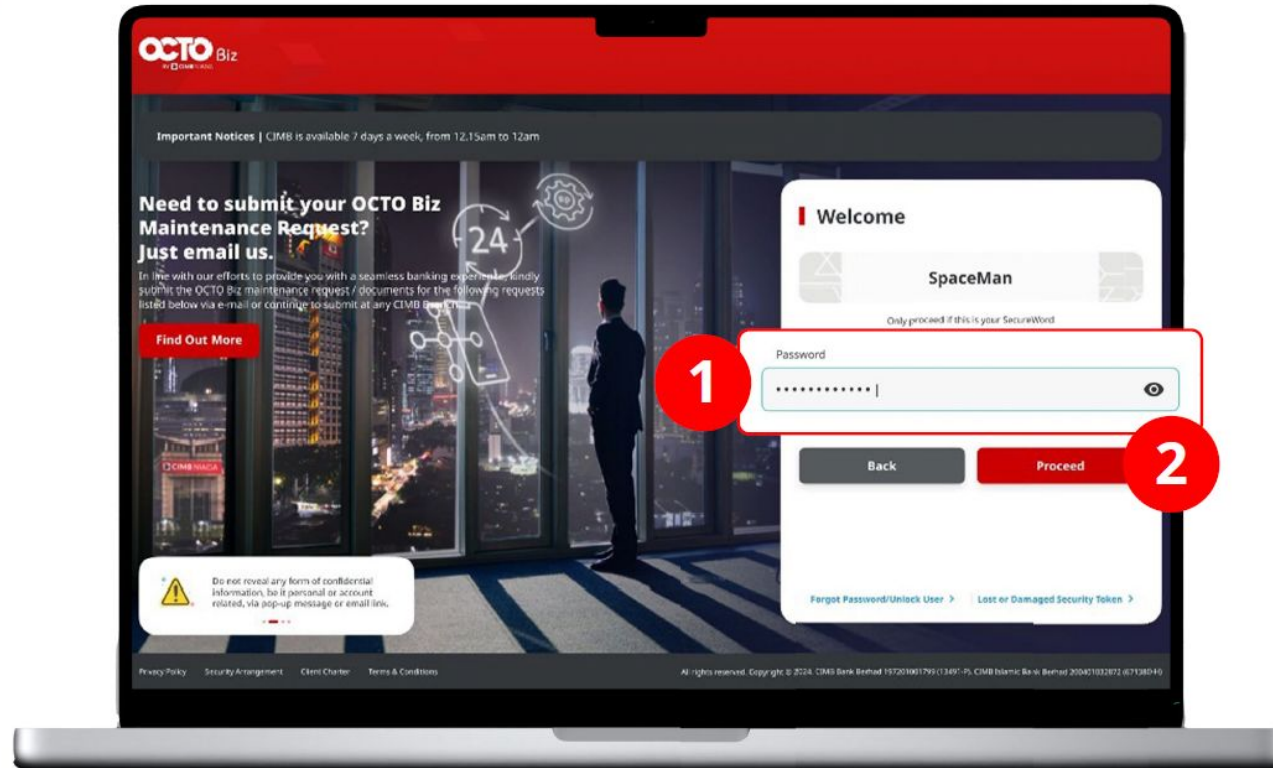


- 1 Masuk sebagai **SysAdmin** dengan menggunakan **User ID & Password**

*Login as **SysAdmin** using **User ID & Password***

- 2 Klik **Next**

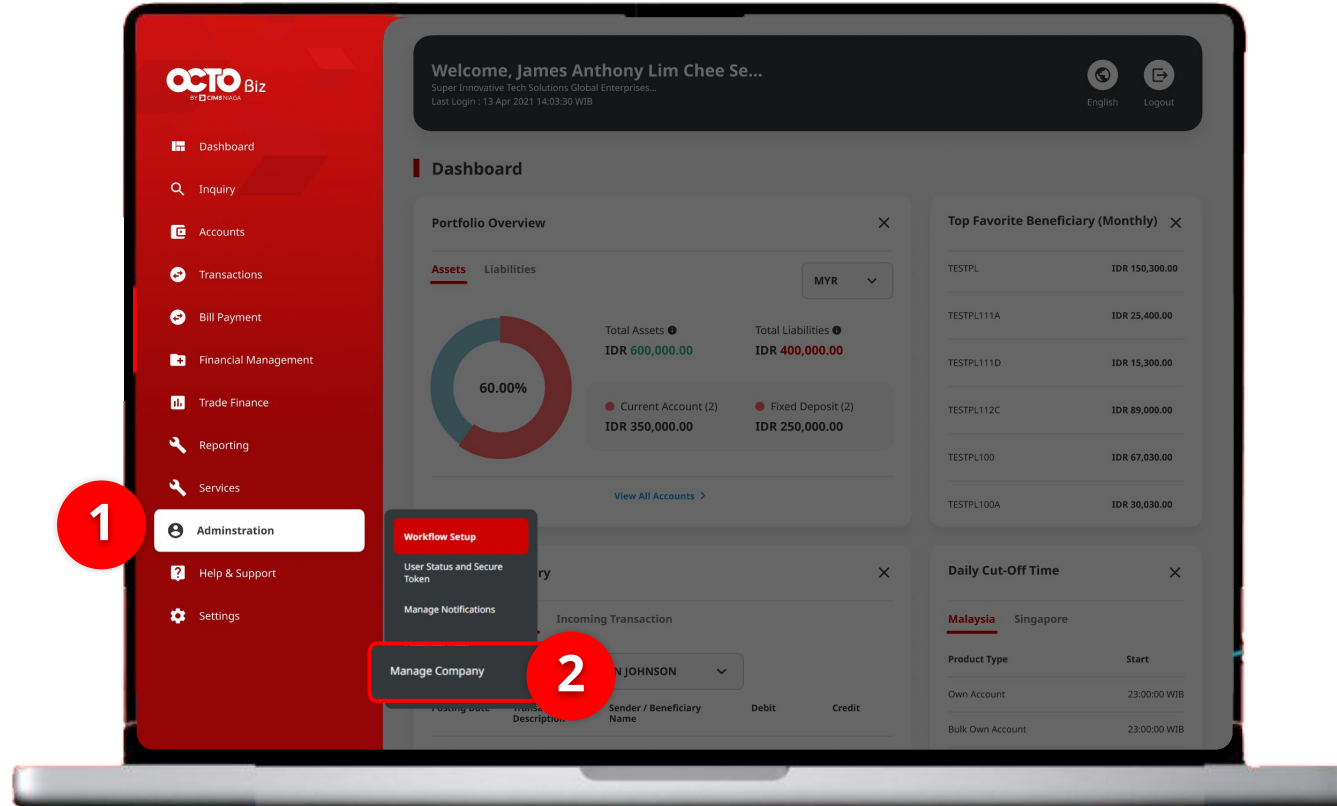
*Click **Next***



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

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





Sistem akan menampilkan halaman **Dashboard**

System will show the **Dashboard** page

**1** Arahkan **Kursor** ke **Administration**

Navigate to **Administration**

**2** Klik **Manage Company**

Click **Manage Company**

**1** **Account Maintenance**

**Manage Company > Details**

**Company Details**

|              |                          |            |
|--------------|--------------------------|------------|
| Company Name | Enrolled Date            | Company ID |
| HUWA         | 10 Oct 2024 15:31:07 WIB | EKASITLITE |

Contact Info User

3 account(s)

| Account No.                  | Account Nickname | Currency | Account Type      | Islamic | Allow Transaction |
|------------------------------|------------------|----------|-------------------|---------|-------------------|
| <a href="#">100108142000</a> | YUUP J UOZWWOQ   | IDR      | Financing Account | No      | Yes               |
| <a href="#">703210810100</a> | HUWA             | IDR      | Savings Account   | No      | Yes               |
| <a href="#">703210811300</a> | HUWA             | IDR      | Savings Account   | No      | Yes               |

**Primary Billing Account**

|                                 |                        |
|---------------------------------|------------------------|
| Primary Billing Account         | Corporate Daily Limit  |
| 100108142000-IDR YUUP J UOZWWOQ | IDR 999,999,999,999.00 |

**2** **Edit**

Sistem akan menampilkan halaman **Manage Company > Details**

System will show the **Manage Company > Details** page

**1** Pilih tab **Account Maintenance**

Choose **Account Maintenance**

**2** Klik **Edit** untuk melakukan **Edit**

Click **Edit**

**Manage Company > Edit**

**Company Details**

|                      |                                           |                          |
|----------------------|-------------------------------------------|--------------------------|
| Company Name<br>HUWA | Enrolled Date<br>10 Oct 2024 15:31:07 WIB | Company ID<br>EKASITLITE |
|----------------------|-------------------------------------------|--------------------------|

**Account Maintenance** | Contact Info | User

5 account(s)

| Account No.                  | Account Nickname     | Currency | Account Type      | Islamic | Allow Transaction | Sub-Action | Transaction Status | Action                 |
|------------------------------|----------------------|----------|-------------------|---------|-------------------|------------|--------------------|------------------------|
| <a href="#">100108142000</a> | YUUP J UOZWVQ        | IDR      | Financing Account | No      | Yes               | -          | -                  |                        |
| <a href="#">101124336300</a> | JJURJ LOTSPUPWVX POO | IDR      | Financing Account | No      | Yes               | -          | -                  | <a href="#">Delete</a> |
| <a href="#">101124336300</a> | JJURJ LOTSPUPWVX POO | IDR      | Financing Account | No      | Yes               | -          | -                  | <a href="#">Delete</a> |
| <a href="#">793210810100</a> | HUWA                 | IDR      | Savings Account   | No      | Yes               | -          | -                  | <a href="#">Delete</a> |
| <a href="#">793210811300</a> | HUWA                 | IDR      | Savings Account   | No      | Yes               | -          | -                  | <a href="#">Delete</a> |

[Retrieve Accounts by Own CIF](#)

**Primary Billing Account**

|                                |                                           |
|--------------------------------|-------------------------------------------|
| Primary Billing Account *      | Corporate Daily Limit *                   |
| 100108142000-IDR YUUP J UOZWVQ | IDR - Indonesia Rupiah 999,999,999,999.00 |

Maximum Available Amount: IDR undefined

**Sub-Action List**

| No. | Sub-Action | Transaction Status |
|-----|------------|--------------------|
| 1   | -          | -                  |

[Save](#) [Submit](#)

1 Klik **Account Hyperlink**

Click **Account Hyperlink**

2 Jika **Account** digunakan sebagai **Primary Billing Account**, maka tombol **Delete** tidak akan ditampilkan

*If the **Account** is used as a **Primary Billing Account**, the **Delete button** will not be displayed*

The screenshot shows the 'Account Details' page. A red arrow points from the 'Account Nickname' field (which has a pencil icon) to a 'Pop Up Edit Account Nickname' dialog box. The dialog box contains a text input field with the current nickname 'YUUP J UOZWWOQ' and a 'Maximum 100 characters' limit. Below the input field are 'Cancel' and 'Save' buttons. The steps are numbered 1, 2, and 3 in red circles.

Sistem akan menampilkan halaman **Pop-up Account Details**

System will show the **Account Details** pop up

**1** Klik **Pencil Icon** untuk mengubah **Account Nickname**

Click the **Pencil Icon** to change the **Account nickname**

**2** Sistem akan menampilkan **Pop Up Edit Account Nickname, Ubah Nickname**

System will show the **Edit Account Nickname** pop up, change the **Nickname**

**3** Klik **Save**

Click **Save**

Sistem akan kembali menampilkan halaman **Pop-up Account Details**

System will show the **Pop-up Account Details** page

- 1 Klik **Pencil Icon** untuk mengubah **Account Limit per Transaction**

Click **Pencil icon** to **change the Account Limit** for each transaction

- 2 Sistem akan menampilkan **Pop Up Edit Account Nickname, Ubah Limit rekening per Transaksi**

System will show the **Edit Account Nickname pop up, Change the account limit** for each Transaction

- 3 Klik **Save**

Click **Save**

Catatan: Jika **Box Unlimited** di pilih, maka Limit Transaksi tidak dapat di ubah

**NOTES:** If the **Unlimited box** is ticked, the **Transaction limit** Can't be edited

The screenshot displays the 'Account Details' page and a 'Pop-up Account Details' window. The 'Account Details' page shows the following information:

| Account No.                   | Account Type      | Currency                    |
|-------------------------------|-------------------|-----------------------------|
| 100108142000                  | Financing Account | IDR                         |
| Account Name                  | Account Nickname  | Receiving Bank              |
| YUUP J UOZWWOQ                | YUUP J UOZWWOQ    | -                           |
| Account with Bank             | Islamic           | Opening Branch              |
| -                             | No                | 24045 - Cirebon - Siliwangi |
| Account Limit Per Transaction | Allow Transaction |                             |
| Unlimited                     | Yes               |                             |

A red circle with the number 1 highlights the pencil icon next to the 'Account Limit Per Transaction' field. An arrow points from this icon to the 'Edit Account Limit Per Transaction' pop-up. The pop-up shows the following information:

| Account Limit Per Transaction      |
|------------------------------------|
| IDR - Indonesia R... 23,456.00     |
| <input type="checkbox"/> Unlimited |

A red circle with the number 2 highlights the input field for the limit. Below the input field is a checkbox labeled 'Unlimited'. A red circle with the number 3 highlights the 'Save' button at the bottom right of the pop-up.



Account Details

Account Details

|                                              |                                      |                                               |
|----------------------------------------------|--------------------------------------|-----------------------------------------------|
| Account No.<br>100108142000                  | Account Type<br>Financing Account    | Currency<br>IDR                               |
| Account Name<br>YUUP J UOZWWOQ               | Account Nickname<br>YUUP J UOZWWOQ ✎ | Receiving Bank<br>-                           |
| Account with Bank<br>-                       | Islamic<br>No                        | Opening Branch<br>24045 - Cirebon - Siliwangi |
| Account Limit Per Transaction<br>Unlimited ✎ | Allow Transaction<br>Yes ✎           |                                               |

Close

Edit Allow Transaction

Allow Transaction

Yes

Search

Please Select

Yes

No

Save

Sistem akan kembali menampilkan halaman **Pop-up Account Details**

System will show the **Account Details** pop up

- 1 Klik **Pencil Icon** untuk mengubah **Allow Transaction**

Click **Pencil icon** to **Edit Allow Transaction**

- 2 Sistem akan menampilkan **Pop Up Edit Allow Transaction**, pilih **Permission**

System will show the **Edit Allow Transaction** pop up, choose permission

- 3 Klik **Save**

Click **Save**

Account Details

Account Details

|                                              |                                      |                                               |
|----------------------------------------------|--------------------------------------|-----------------------------------------------|
| Account No.<br>100108142000                  | Account Type<br>Financing Account    | Currency<br>IDR                               |
| Account Name<br>YUUP J UOZWWOQ               | Account Nickname<br>YUUP J UOZWWOQ ✎ | Receiving Bank<br>-                           |
| Account with Bank<br>-                       | Islamic<br>No                        | Opening Branch<br>24045 - Cirebon - Siliwangi |
| Account Limit Per Transaction<br>Unlimited ✎ | Allow Transaction<br>Yes ✎           |                                               |

1

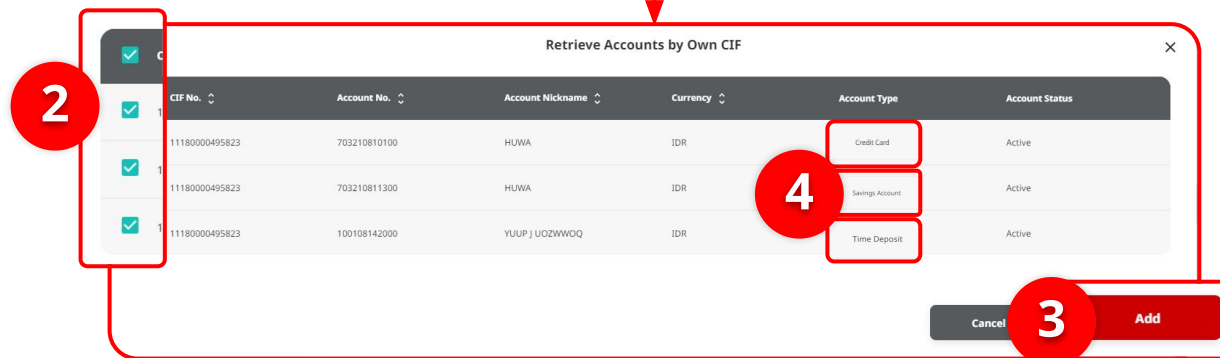
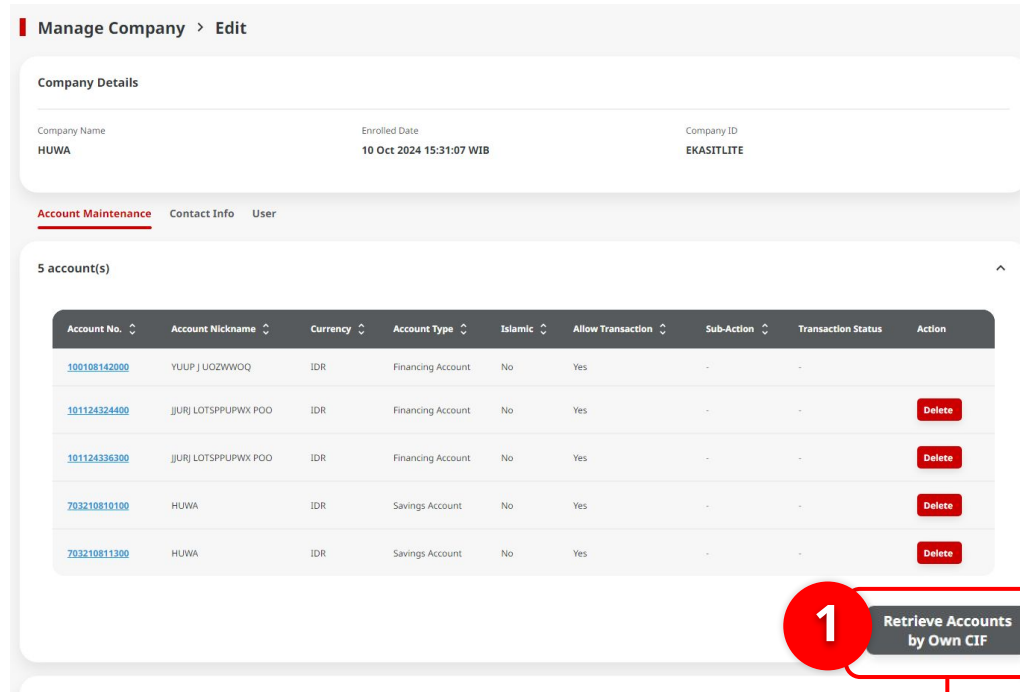
Close

Sistem akan kembali menampilkan halaman **Pop-up Account Details**

*System will show the **Account Details** pop up*

**1** Jika sudah sesuai, **Klik Done**

*Once OK, Click **Done***



Sistem akan kembali menampilkan halaman **Manage Company > Details**

System will show the **Manage Company > Details** page

**1** Klik Tombol **Retrieve Accounts by Own CIF**

Click **Retrieve Accounts by Own CIF**

**2** Sistem akan menampilkan **Box Retrieve Account**, pilih **account** yang diinginkan

System will show the **Retrieve Account box**, choose **Account**

**3** Klik **Add**

Click **Add**

**4** User dapat melihat **Account Type**: **Time Deposit**, **Credit Card**, **Savings Account**

User can see the **Account Type**: **Time Deposit**, **Credit Card**, **Savings Account**

LANGKAH

11

Manage Company > Edit

Company Details

Company Name

Enrolled Date

Company ID

HUWA

10 Oct 2024 15:31:07 WIB

EKASITLITE

Account Maintenance

Contact Info

User

5 account(s)

| Account No.  | Account Nickname    | Currency | Account Type      | Islamic | Allow Transaction | Sub-Action | Transaction Status | Action |
|--------------|---------------------|----------|-------------------|---------|-------------------|------------|--------------------|--------|
| 100108142000 | YUUP J UOZWWOQ      | IDR      | Financing Account | No      | Yes               | -          | -                  |        |
| 101124324400 | JJURJ LOTSPUPWX POO | IDR      | Financing Account | No      | Yes               | -          | -                  | Delete |
| 101124336300 | JJURJ LOTSPUPWX POO | IDR      | Financing Account | No      | Yes               | -          | -                  | Delete |
| 703210810100 | HUWA                | IDR      | Savings Account   | No      | Yes               | -          | -                  | Delete |
| 703210811300 | HUWA                | IDR      | Savings Account   | No      | Yes               | -          | -                  | Delete |

Retrieve Accounts by Own CIF

Primary Billing Account

Primary Billing Account \*

Corporate Daily Limit \*

100108142000-IDR YUUP J UOZWWOQ

IDR - Indonesia Rupiah

999,999,999,999.00

Maximum Available Amount: IDR undefined

Sub-Action List

| No. | Sub-Action | Transaction Status |
|-----|------------|--------------------|
| 1   |            | -                  |

1

Save

Submit

Sistem akan kembali menampilkan Halaman **Edit** setelah **List** ditambahkan

System will *show the Edit page* after list added

1 Jika sudah sesuai, klik **Save**

Once ok, click **Save**

SysAdmin

# Manage Company

*Account Maintenance*

*Contact Info*

*User*

Sistem akan menampilkan halaman **Manage Company > Edit**

System will show the **Manage Company > Edit**

**Manage Company > Edit**

Company Details

Company Name: HUWA      Enrolled Date: 10 Oct 2024 15:31:07 WIB      Company ID: EKASITLITE

**1** **Contact Info**      User

**Primary Contact Info**

Name: EKA      Phone No.: -

Email: AD@GMAIL.COM

**2** **1 EKA**      Admin      +603423523423      AD@GMAIL.COM      Yes      Yes      Edit      -

**3**

Add

Save      Submit

**1** Pilih tab **Contact Info**

Choose **Contact Info** tab

**2** Klik **Hyperlink Contact Info** untuk melakukan **Edit Contact info** yang tercatat di dalam **Admin and Cash**

Click **Contact Info Hyperlink** to **edit** the **Contact Info** that recorded on **Admin and Cash**

**3** Bagian **Primary Contact Info**, tidak dapat diubah

On **Primary Contact info**, can't be change

| Contact Purpose (Applicable in Contact Info Listing) | Remarks                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Admin                                                | <ul style="list-style-type: none"> <li>• untuk <i>Contact Purpose</i> sebagai <b>"Admin"</b>, akan mendapat <b>Welcome letter</b> setelah proses <i>Company Onboarding</i> Selesai<br/><i>To contact purpose as "Admin", will get the Welcome Letter after Company Onboarding Process succeed</i></li> <li>• <i>Contact Purpose</i> digunakan di dalam <b>Layout Payment Advice</b><br/><i>Contact Purpose is used on Payment Advice Layout</i></li> <li>• Pada <i>Layout Payment Advice</i>, akan <b>diprioritaskan</b> menggunakan <i>Contact Purpose</i> dengan tag <b>"Cash"</b><br/><i>In the Payment Advice layout, the system will prioritize using the Contact Purpose tagged as "Cash."</i></li> </ul> |
| Cash                                                 | <ul style="list-style-type: none"> <li>• Jika <b>tidak memiliki</b> <i>Contact Purpose</i> dengan tag <b>"Cash"</b>, maka dapat menggunakan <i>Contact Purpose</i> dengan Tag <b>"Admin"</b><br/><i>If there is no Contact Purpose tagged "Cash," then the Contact Purpose tagged "Admin" can be used</i></li> <li>• Setiap <b>Corporate ID</b>, hanya dapat memiliki <b>1 contact info</b> dengan Tag <b>"Cash"</b><br/><i>Each Corporate ID can have only one contact information entry tagged as "Cash."</i></li> </ul>                                                                                                                                                                                      |



The image shows two screenshots of the 'Contact Info Details' form. The top screenshot shows the form with fields for Name, Phone No., Country Code, Mobile No., and Email. A red box labeled '1' highlights the 'Display Contact Details' checkbox, which is checked. The bottom screenshot shows the same form with the 'Use Primary Contact' checkbox checked. A red box labeled '2' highlights the 'Use Primary Contact' checkbox, and a red box labeled '3' highlights the 'Save' button.

Sistem akan menampilkan *Pop-up Contact Info Details*

System will show the *Contact Info Details pop up*

- 1** *Edit* Bagian yang dibutuhkan  
*Edit needed part*
- 2** Jika Kolom **Primary contact** di pilih, maka bagian lain akan di **disable** oleh sistem dan tidak dapat di *Edit*  
*If the Primary Contact ticked, other parts will be disabled by system and can't be edited*

- 3** Jika sudah sesuai, **Klik Save**  
*Once OK, click Save*

Manage Company > Edit

Company Details

Company Name

Enrolled Date

Company ID

HUWA

10 Oct 2024 15:31:07 WIB

EKASITLITE

Account Maintenance

Contact Info

User

Primary Contact Info

Name

Phone No.

Mobile No.

EKA

-

+603423523423

Email

AD@GMAIL.COM

Contact Info Listing

| No. | Name                | Contact Purpose | Mobile No.    | Email        | Use Primary Contact | Display Contact Details | Sub-Action | Transaction Status |
|-----|---------------------|-----------------|---------------|--------------|---------------------|-------------------------|------------|--------------------|
| 1   | <a href="#">EKA</a> | Admin           | +603423523423 | AD@GMAIL.COM | Yes                 | Yes                     | Edit       | -                  |

1

Add

Save

Submit

Sistem akan mengarahkan kembali ke **Halaman Edit**

*System will show the **Edit** page*

**1** Klik **Add**

*Click **Add***

## LANGKAH

# 15

The screenshot shows the 'Contact Info Details' form. A red box labeled '1' highlights the 'Contact Purpose' dropdown menu, which is open to show options: 'Select', 'Search', 'Please Select', 'Admin', and 'Cash'. A red box labeled '2' highlights the main form fields: 'Name' (with 'Enter' placeholder), 'Phone No.' (with '123456789' placeholder), 'Country Code' (with '+62' placeholder), 'Mobile No.' (with '123456789' placeholder), and 'Email' (with 'Enter' placeholder). A red box labeled '3' highlights the 'Save' button at the bottom right of the form. The form also includes a 'Use Primary Contact' checkbox and a 'Display Contact Details' checkbox (which is checked).

## Contact Info | Manage Company

Menu: Administration > Manage Company

Sistem akan menampilkan  
**Pop-up Contact Info Details**

System will show **Contact Info Details** pop up

- 1** Pilih **Contact Purpose** yang sesuai  
*Choose **Contact Purpose***
- 2** Lengkapi seluruh bagian **Mandatory**  
*Complete the **Mandatory** part*
- 3** Klik **Save**  
*Click **Save***

Catatan: Jika **Box Primary Contact** dipilih, maka bagian yang lain tidak dapat di edit

*Note: If **Primary Contact** Box ticked, other parts can't be edited*

Manage Company > Edit

Company Details

Company Name

Enrolled Date

Company ID

HUWA

10 Oct 2024 15:31:07 WIB

EKASITLITE

Account Maintenance

Contact Info

User

Primary Contact Info

Name

Phone No.

Mobile No.

EKA

-

+603423523423

Email

AD@GMAIL.COM

Contact Info Listing

| No. | Name                | Contact Purpose | Mobile No.    | Email        | Use Primary Contact | Display Contact Details | Sub-Action | Transaction Status |
|-----|---------------------|-----------------|---------------|--------------|---------------------|-------------------------|------------|--------------------|
| 1   | <a href="#">EKA</a> | Admin           | +603423523423 | AD@GMAIL.COM | Yes                 | Yes                     | Edit       | -                  |

Add

Save Submit

Sistem akan kembali menampilkan **Halaman Edit**

*System will show the **Edit** page*

SysAdmin

# Manage Company

*Account Maintenance*

*Contact Info*

*User*

**Manage Company > Edit**

**Company Details**

|                      |                                           |                          |
|----------------------|-------------------------------------------|--------------------------|
| Company Name<br>HUWA | Enrolled Date<br>10 Oct 2024 15:31:07 WIB | Company ID<br>EKASITLITE |
|----------------------|-------------------------------------------|--------------------------|

**Account Maintenance**

**1** **User**

**Search**

Search By

**User ID** **User Name** **Enter**

**Search**

5 user(s)

| No. | User ID                   | User Full Name | Mobile No.    | Email                       | Single Access User | Secure Token Type       | Sub-Action | Transaction Status     |
|-----|---------------------------|----------------|---------------|-----------------------------|--------------------|-------------------------|------------|------------------------|
| 1   | <a href="#">ADMINLITE</a> | ADMINLITE      | +623423423423 | AD@GMAIL.COM                | No                 | Secure Token (Software) | -          | -                      |
| 2   | <a href="#">EKAAUTH01</a> | EKA AUTHO 1    | +62242312421  | AD@GMAIL.COM                | Yes                | Secure Token (Software) | -          | -                      |
| 3   | <a href="#">EKAMAKER1</a> | EKA MAKER 1    | 0111111111    | AD@GMAIL.COM                | No                 | Secure Token (Software) | -          | <a href="#">Delete</a> |
| 4   | <a href="#">NEW USER</a>  | Chanpreet      | 0999999999    | chanpreetdhanoa01@gmail.com | Yes                | -                       | -          | <a href="#">Delete</a> |
| 5   | <a href="#">TEST1</a>     | test1          | +62567898765  | test1@gmail.com             | No                 | -                       | -          | -                      |

**2** **Add**

**Save** **Submit**

Sistem akan menampilkan halaman **Manage Company > Edit**

System will show the **Manage Company > Edit**

**1** Pilih tab **User**

Choose **User** tab

**2** Klik **Add**

Click **Add**

**1** Lengkapi seluruh bagian **mandatory**

**2** Pilih **User Role**

**3** Jika sudah sesuai, **Klik Save**

Once OK, click **Save**

| No.               | Signature Type | Description |
|-------------------|----------------|-------------|
| No records found. |                |             |

Sistem akan menampilkan Pop-up **User Details**

System will show the **User Details** pop up

**1** Lengkapi seluruh bagian **mandatory**

Complete the **Mandatory** Parts

**2** Pilih **User Role**

Choose **User Role**

**3** Jika sudah sesuai, **Klik Save**

Once OK, click **Save**



**Manage Company > Edit**

**Company Details**

|                      |                                           |                          |
|----------------------|-------------------------------------------|--------------------------|
| Company Name<br>HUWA | Enrolled Date<br>10 Oct 2024 15:31:07 WIB | Company ID<br>EKASITLITE |
|----------------------|-------------------------------------------|--------------------------|

Account Maintenance   Contact Info   **User**

**Search**

Search By

User ID   User Name   Enter

Search

6 user(s)

| No. | User ID                   | User Full Name | Mobile No.    | Email                        | Single Access User | Secure Token Type       | Sub-Action | Transaction Status     |
|-----|---------------------------|----------------|---------------|------------------------------|--------------------|-------------------------|------------|------------------------|
| 1   | <a href="#">ADMINLITE</a> | ADMINLITE      | +623423423423 | AD@GMAIL.COM                 | No                 | Secure Token (Software) | -          | -                      |
| 2   | <a href="#">EKAAUTH01</a> | EKA AUTH0 1    | +62242312421  | AD@GMAIL.COM                 | Yes                | Secure Token (Software) | -          | -                      |
| 3   | <a href="#">EKAMAKER1</a> | EKA MAKER 1    | 0111111111    | AD@GMAIL.COM                 | No                 | Secure Token (Software) | -          | <a href="#">Delete</a> |
| 4   | <a href="#">NEW_USER</a>  | Changpreet     | 09999999999   | changpreetdhanoo01@gmail.com | Yes                | -                       | -          | <a href="#">Delete</a> |
| 5   | <a href="#">TEST1</a>     | test1          | +62567898765  | test1@gmail.com              | No                 | -                       | -          | -                      |
| 6   | <a href="#">TESTT</a>     | test           | 12345678      | test1@gmail.com              | No                 | -                       | Create     | <a href="#">Delete</a> |

Add

Save   Submit

Sistem akan kembali menampilkan halaman **Edit**

System will show the **Edit** page

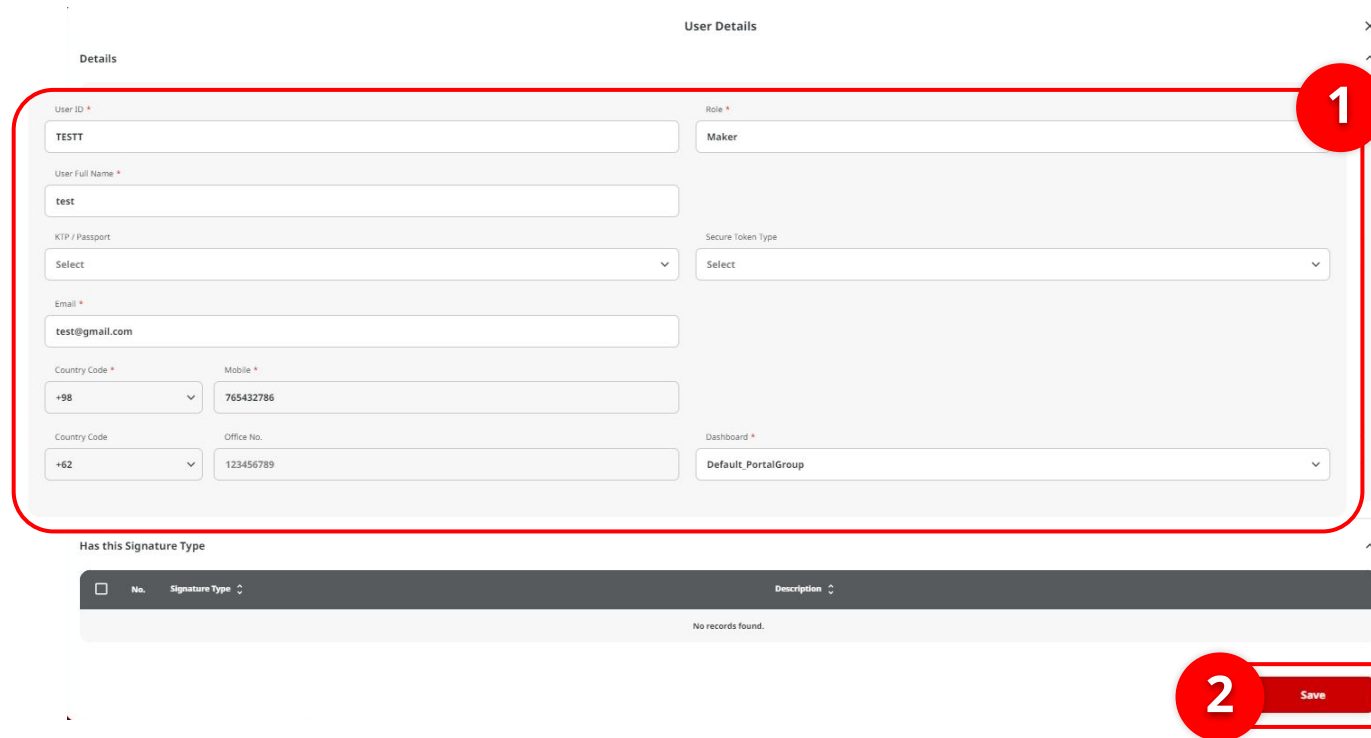
**1** Klik **User Hyperlink**

Click **User Hyperlink**

**Catatan:**

**NOTES:**

- Jika **Tag User** merupakan **SysAdmin**: hanya dapat **melihat details, fields** tidak dapat di **edit** atau **disable**  
*If the User Tag is SysAdmin: only can see details, fields can't be edited*
- Jika **Tag User** sebagai **normal User**: Dapat melakukan **edit** dan **delete**  
*If User Tag is a Normal User: can edit and delete*



**User Details**

Details

User ID \*  
TESTT

User Full Name \*  
test

KTP / Passport  
Select

Email \*  
test@gmail.com

Country Code \*  
+98

Mobile \*  
765432786

Country Code  
+62

Office No.  
123456789

Role \*  
Maker

Secure Token Type  
Select

Dashboard \*  
Default\_PortalGroup

Has this Signature Type

| No.               | Signature Type | Description |
|-------------------|----------------|-------------|
| No records found. |                |             |

Save

Sistem akan menampilkan **Pop-up User Details** dengan **Maker Role**

System will show the **User Details** pop up with **Maker Role**

**1** **Edit Bagian** yang dibutuhkan

*Edit needed part*

**2** Klik **Save**

*Click Save*

**Manage Company > Edit**

**Company Details**

|              |                          |            |
|--------------|--------------------------|------------|
| Company Name | Enrolled Date            | Company ID |
| HUWA         | 10 Oct 2024 15:31:07 WIB | EKASITLITE |

Account Maintenance   Contact Info   **User**

**Search**

Search By

**Search**

6 user(s)

| No. | User ID                   | User Full Name | Mobile No.    | Email                      | Single Access User | Secure Token Type       | Sub-Action | Transaction Status     |
|-----|---------------------------|----------------|---------------|----------------------------|--------------------|-------------------------|------------|------------------------|
| 1   | <a href="#">ADMINLITE</a> | ADMINLITE      | +623423423423 | AD@GMAIL.COM               | No                 | Secure Token (Software) | -          | -                      |
| 2   | <a href="#">EKAAUTH01</a> | EKA AUTH0 1    | +62242312421  | AD@GMAIL.COM               | Yes                | Secure Token (Software) | -          | -                      |
| 3   | <a href="#">EKAMAKER1</a> | EKA MAKER 1    | 0111111111    | AD@GMAIL.COM               | No                 | Secure Token (Software) | -          | <a href="#">Delete</a> |
| 4   | <a href="#">NEW USER</a>  | Chanpreet      | 0999999999    | chanpreethanoo01@gmail.com | Yes                | -                       | -          | <a href="#">Delete</a> |
| 5   | <a href="#">TEST1</a>     | test1          | +62567898765  | test1@gmail.com            | No                 | -                       | -          | -                      |
| 6   | <a href="#">TEST2</a>     | test           | 12345678      | test1@gmail.com            | No                 | -                       | Create     | <a href="#">Delete</a> |

**1**

**Add**

**Save** **Submit**

**Delete**

Do you want to delete this user?

**No** **Yes** **2**

Sistem akan kembali menampilkan halaman **Edit**

System will show the **Edit** page

**1** Klik **Delete**

Click **Delete**

**2** Klik **Yes**

Click **Yes**

Manage Company > Edit

Company Details

Company Name

Enrolled Date

Company ID

HUWA

10 Oct 2024 15:31:07 WIB

EKASITLITE

Account Maintenance

Contact Info

User

Search

Search By

User ID

User Name

Enter

Search

5 user(s)

| No. | User ID                   | User Full Name | Mobile No.    | Email                       | Single Access User | Secure Token Type       | Sub-Action | Transaction Status     |
|-----|---------------------------|----------------|---------------|-----------------------------|--------------------|-------------------------|------------|------------------------|
| 1   | <a href="#">ADMINLITE</a> | ADMINLITE      | +623423423423 | AD@GMAIL.COM                | No                 | Secure Token (Software) | -          | -                      |
| 2   | <a href="#">EKAAUTHO1</a> | EKA AUTHO 1    | +62242312421  | AD@GMAIL.COM                | Yes                | Secure Token (Software) | -          | -                      |
| 3   | <a href="#">EKAMAKER1</a> | EKA MAKER 1    | 0111111111    | AD@GMAIL.COM                | No                 | Secure Token (Software) | -          | <a href="#">Delete</a> |
| 4   | <a href="#">NEW USER</a>  | Chanpreet      | 09999999999   | chanpreetdhanoa01@gmail.com | Yes                | -                       | -          | <a href="#">Delete</a> |
| 5   | <a href="#">TEST1</a>     | test1          | +62567898765  | test1@gmail.com             | No                 | -                       | -          | -                      |

Add

Save

Submit

Sistem akan mengarahkan ke **Halaman Edit** dengan **List** yang ingin di **hapus**

*The system will direct you to the **Edit Page with the List** you want to delete*

1 Klik **Submit**

*Click **Submit***

LANGKAH

23

Tasklist > Acknowledgement

Submitted for approval

Reference No.: 116241015000001238 Submitted On: 15 Oct 2024 17:30:13 WIB

Company Details

Company Name: HUWA Enrolled Date: 10 Oct 2024 15:31:07 WIB Company ID: EKASITLITE

Account Maintenance Contact Info User

5 account(s)

| Account No.  | Account Nickname   | Currency | Account Type      | Islamic | Allow Transaction | Sub-Action | Transaction Status |
|--------------|--------------------|----------|-------------------|---------|-------------------|------------|--------------------|
| 100108142000 | YUUP J UOZWWDQ     | IDR      | Financing Account | No      | Yes               |            |                    |
| 10112424400  | JURU LOTSPUPPW POO | IDR      | Financing Account | No      | Yes               |            |                    |
| 10112424300  | JURU LOTSPUPPW POO | IDR      | Financing Account | No      | Yes               |            |                    |
| 703210010100 | HUWA               | IDR      | Savings Account   | No      | Yes               |            |                    |
| 703210011300 | HUWA               | IDR      | Savings Account   | No      | Yes               |            |                    |

Primary Billing Account

Primary Billing Account: 100108142000-IDR YUUP J UOZWWDQ Corporate Daily Limit: IDR 999,999,999,999,999.00

User Activities

| User          | Activities | Date/Time                | Remark |
|---------------|------------|--------------------------|--------|
| TEST1 - test1 | Save       | 15 Oct 2024 17:12:21 WIB |        |
| TEST1 - test1 | Submit     | 15 Oct 2024 17:30:13 WIB |        |

Print Done

Tasklist > Acknowledgement

Submitted for approval

Reference No.: 116241015000001238 Submitted On: 15 Oct 2024 17:30:13 WIB

Company Details

Company Name: HUWA Enrolled Date: 10 Oct 2024 15:31:07 WIB Company ID: EKASITLITE

Account Maintenance Contact Info User

Primary Contact Info

Name: EKA Email: AD@GMAIL.COM Mobile No.: +628423523423

Phone No.: +

Contact Info Listing

| No. | Name | Contact Purpose | Mobile No.    | Email        | Use Primary Contact | Display Contact Details | Sub-Action | Transaction Status |
|-----|------|-----------------|---------------|--------------|---------------------|-------------------------|------------|--------------------|
| 1   | EKA  | Admin           | +628423523423 | AD@GMAIL.COM | Yes                 | Yes                     | Edit       |                    |

User Activities

| User          | Activities | Date/Time                | Remark |
|---------------|------------|--------------------------|--------|
| TEST1 - test1 | Save       | 15 Oct 2024 17:12:21 WIB |        |
| TEST1 - test1 | Submit     | 15 Oct 2024 17:30:13 WIB |        |

Print Done

Tasklist > Acknowledgement

Submitted for approval

Reference No.: 116241015000001238 Submitted On: 15 Oct 2024 17:30:13 WIB

Company Details

Company Name: HUWA Enrolled Date: 10 Oct 2024 15:31:07 WIB Company ID: EKASITLITE

Account Maintenance Contact Info User

User Listing - Total 5 item(s) in the batch

| No. | User ID    | User Full Name | Mobile No.     | Email                     | Single Access User | Secure Token Type       | Sub-Action | Transaction Status |
|-----|------------|----------------|----------------|---------------------------|--------------------|-------------------------|------------|--------------------|
| 1   | ADMINLTE   | ADMINLTE       | +628423423423  | AD@GMAIL.COM              | No                 | Secure Token (Software) |            |                    |
| 2   | EKAAUTH001 | EKA AUTH0 1    | +62842312421   | AD@GMAIL.COM              | Yes                | Secure Token (Software) |            |                    |
| 3   | EKAMAKER1  | EKA MAKER 1    | 0111111111     | AD@GMAIL.COM              | No                 | Secure Token (Software) |            |                    |
| 4   | NEW USER   | Changwee       | 0999999999     | changwee@nasa01@gmail.com | Yes                |                         |            |                    |
| 5   | TEST1      | test1          | +6282160145119 | test1@gmail.com           | No                 |                         |            |                    |

User Activities

| User          | Activities | Date/Time                | Remark |
|---------------|------------|--------------------------|--------|
| TEST1 - test1 | Save       | 15 Oct 2024 17:12:21 WIB |        |
| TEST1 - test1 | Submit     | 15 Oct 2024 17:30:13 WIB |        |

Print Done

Sistem akan menampilkan Halaman **Submitted for Approval**. **user** dapat melihat **detail submission** pada setiap tab nya

System will show the **Submitted for Approval** page. User can see the **submission details on every Tab**

**SysAdmin Approval Process**

# **Manage Company**

## LANGKAH

# 01

## APPROVER



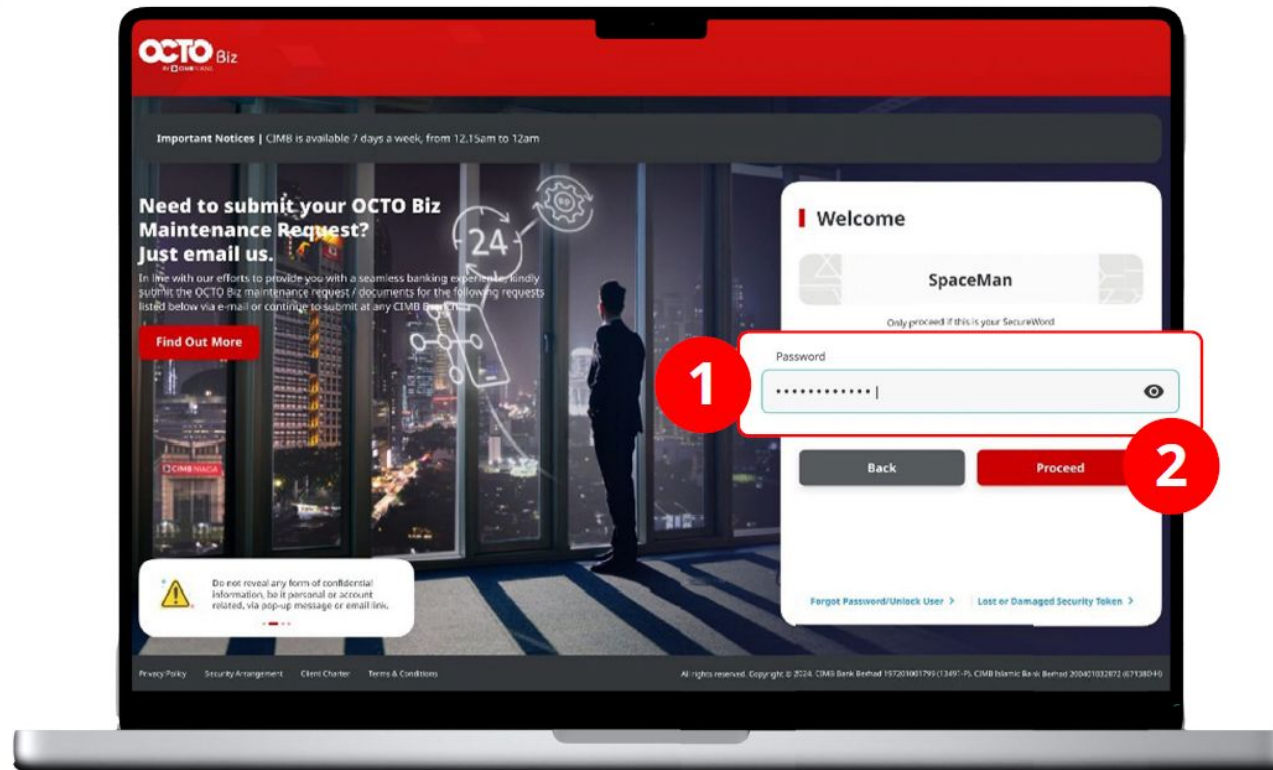
## Approval Process | Manage Company

Menu: Administration > Manage Company

- 1 Masuk sebagai **SysAdmin Approver** dengan menggunakan **User ID & Password**

Login as **SysAdmin Approver** using **User ID & Password**

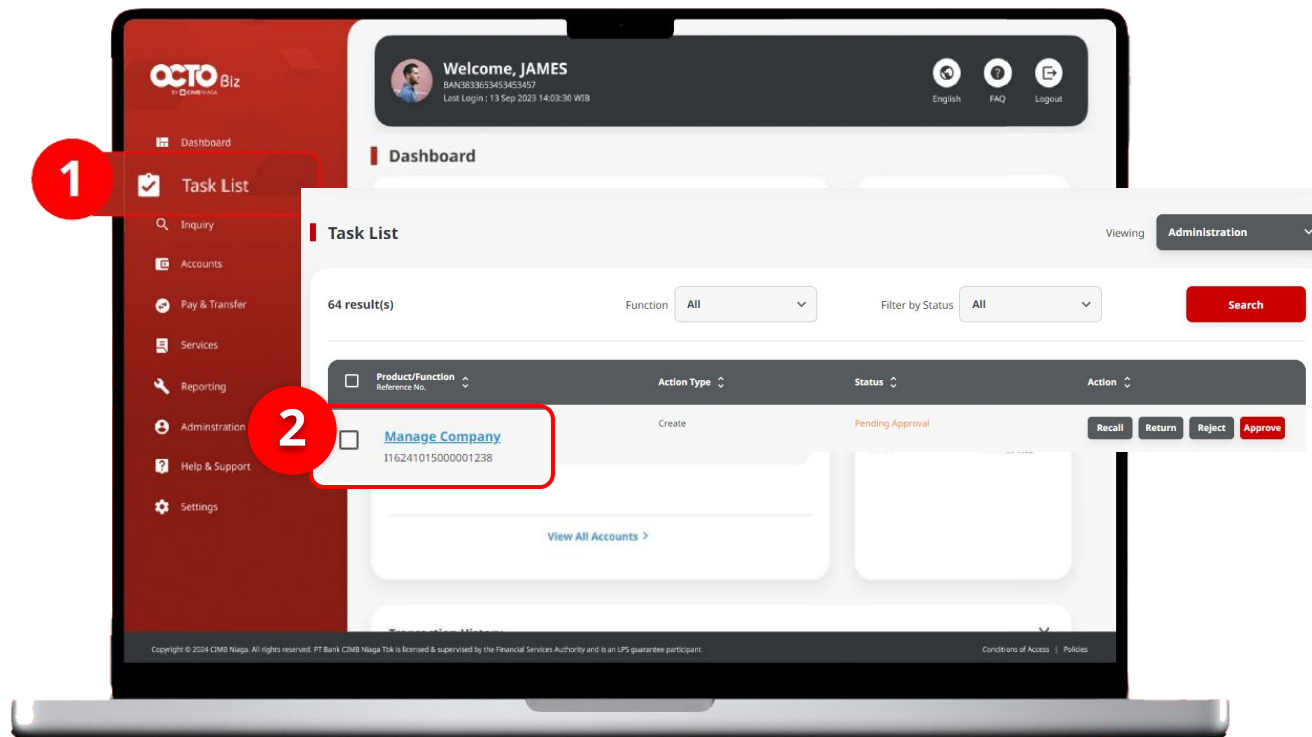
- 2 Klik **Next**  
Click **Next**



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

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





- 1 Arahkan pada menu disamping, klik **Task List**

*Navigate to side menu, click **Task List***

- 2 Klik **Hyperlink** transaksi yang diinginkan

*Click **hyperlink transaction***

**Task List > Details**

Transaction Status : **Pending Approval**

Creation Date: 15 Oct 2024 17:12:21 WIB | Workflow Type: Edit

---

**Company Details**

Company Name: HUWA | Enrolled Date: 10 Oct 2024 15:31:07 WIB | Company ID: EKASITLITE

---

Account Maintenance • Contact Info • **User**

---

Search By: User ID User Name Enter Search

5 user(s)

| No. | User ID   | User Full Name | Mobile No.     | Email                        | Single Access User | Secure Token Type | Sub-Action | Transaction Status |
|-----|-----------|----------------|----------------|------------------------------|--------------------|-------------------|------------|--------------------|
| 1   | ADMINLITE | ADMINLITE      | +623423423423  | AD@GMAIL.COM                 | No                 | Mobile            | -          | -                  |
| 2   | EKAAUTH01 | EKA-AUTH01     | +62242312421   | AD@GMAIL.COM                 | Yes                | Mobile            | -          | -                  |
| 3   | EKAMAKER1 | EKA-MAKER1     | 0111111111     | AD@GMAIL.COM                 | No                 | Mobile            | -          | -                  |
| 4   | NEW USER  | Changpreet     | 0999999999     | changpreetsharma01@gmail.com | Yes                | -                 | -          | -                  |
| 5   | TEST1     | test1          | +6282166145119 | test1@gmail.com              | No                 | Mobile            | -          | -                  |

---

**User Activities**

| User          | Activities | Date/Time                | Remark |
|---------------|------------|--------------------------|--------|
| TEST1 - test1 | Save       | 15 Oct 2024 17:12:21 WIB |        |
| TEST1 - test1 | Submit     | 15 Oct 2024 17:30:13 WIB |        |

---

**Remark**

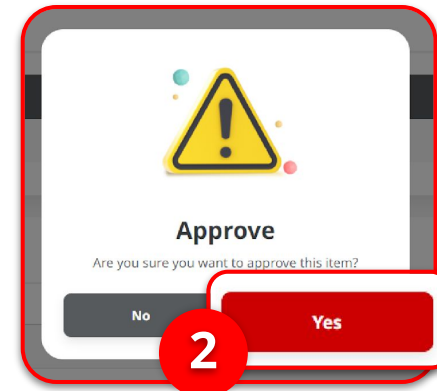
Remarks:

Enter

Maximum 100 characters

---

Back Recall Return **Approve**



Tinjau ulang transaksi yang telah di kirim **SysAdmin Maker**,

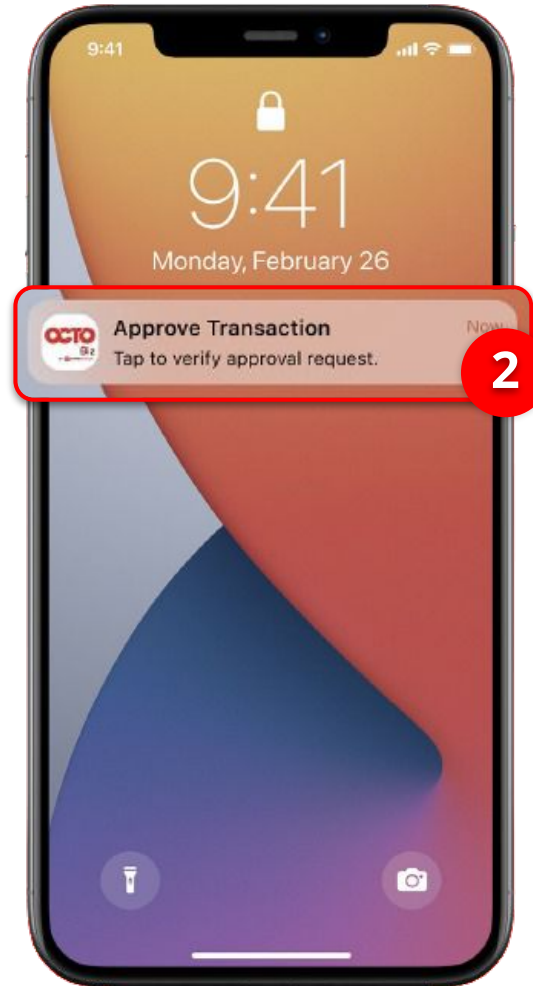
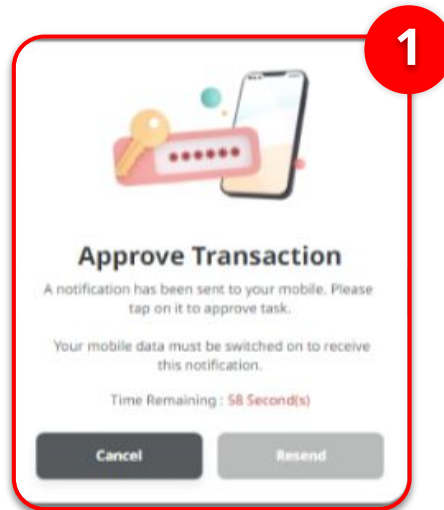
*Review Transaction*

**1** Jika sudah sesuai, klik **Approve**

*Click Approve*

**2** Klik **Yes**

*Click Yes*



- 1 Sistem akan menampilkan **Pop-Up Approver transaksi pada Website**

*System will show the **Approve Transaction pop up** on website*

- 2 Sistem akan **mengirimkan notifikasi** di perangkat *mobile*. Buka perangkat *mobile*, **Klik Bar Notifikasi**

*System will **send notification** on mobile device. Open device, and click **notification bar***

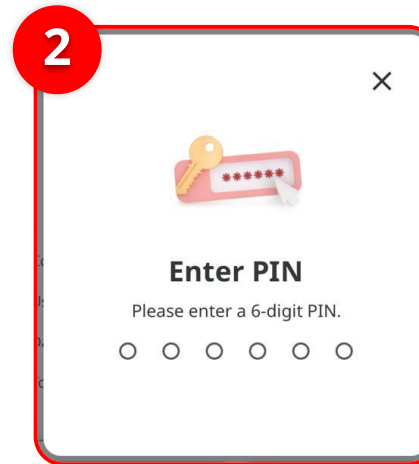
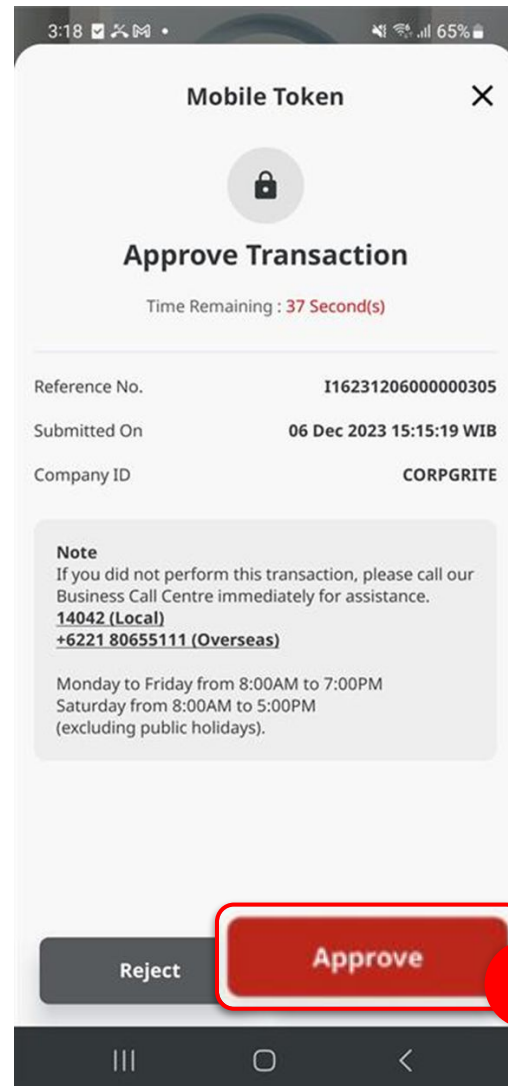
## LANGKAH

# 06

### APPROVER

## Approval Process | Manage Company

Menu: Administration > Manage Company

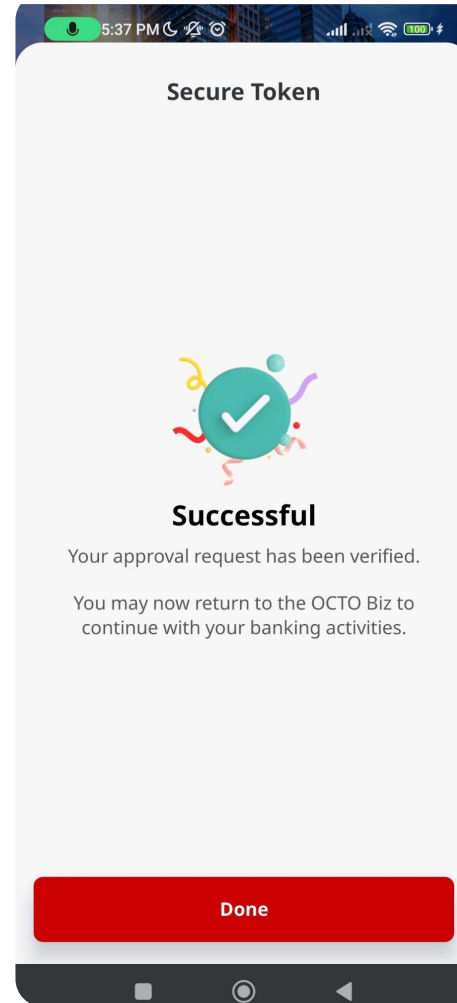


**1** Klik **Tombol Approve**

*Click **Approve***

**2** Isi **6-Digit Pin**

*Input **6-Digit Pin***



Jika transaksi Berhasil, sistem akan menampilkan **halaman Acknowledgement**

*Once succeed, system will show the **acknowledgement page***

Contact Info Acknowledgement

Tasklist > Acknowledgement

Change(s) approved

Reference No.: 11624101600001272 Approved On: 16 Oct 2024 15:14:11 WIB

Company Details

Company Name

Enrolled Date

Company ID

HUWA

10 Oct 2024 15:31:07 WIB

EKASITLITE

Account Maintenance

Contact Info

User

5 account(s)

| Account No.  | Account Nickname  | Currency | Account Type      | Islamic | Allow Transaction | Sub-Action | Transaction Status |
|--------------|-------------------|----------|-------------------|---------|-------------------|------------|--------------------|
| 100108162009 | YUUP J UOZWWQ     | IDR      | Financing Account | No      | Yes               | Edit       | Successful         |
| 101124324609 | JUW LOTSPUPPW FOX | IDR      | Financing Account | No      | No                |            |                    |
| 793210815109 | HUWA              | IDR      | Savings Account   | No      | Yes               |            |                    |
| 793210811309 | HUWA              | IDR      | Savings Account   | No      | Yes               |            |                    |
| 793210811309 | HUWA              | IDR      | Savings Account   | No      | Yes               |            |                    |

Primary Billing Account

Primary Billing Account

Corporate Daily Limit

100108142009-IDR YUUP J UOZWWQ

IDR 999,999,999,999.00

User Activities

| User                   | Activities | Date/Time                | Remark |
|------------------------|------------|--------------------------|--------|
| EKAAUTH01 - EKA.AUTH01 | Save       | 16 Oct 2024 15:11:48 WIB |        |
| ADMNLITE - ADMNLITE    | Submit     | 16 Oct 2024 15:13:09 WIB |        |
| EKAAUTH01 - EKA.AUTH01 | Approve    | 16 Oct 2024 15:14:12 WIB |        |

Print

Done

Contact Info Pending Approval Tab

Tasklist > Acknowledgement

Change(s) approved

Reference No.: 11624101600001272 Approved On: 16 Oct 2024 15:14:11 WIB

Company Details

Company Name

Enrolled Date

Company ID

HUWA

10 Oct 2024 15:31:07 WIB

EKASITLITE

Account Maintenance

Contact Info

User

Primary Contact Info

Name

Email

Mobile No.

EKA

AD@GMAIL.COM

+623423523423

Contact Info Listing

| No. | Name | Contact Purpose | Mobile No.    | Email        | Use Primary Contact | Display Contact Details | Sub-Action | Transaction Status |
|-----|------|-----------------|---------------|--------------|---------------------|-------------------------|------------|--------------------|
| 1   | EKA  | Admin           | +623423523423 | AD@GMAIL.COM | Yes                 | Yes                     |            |                    |

User Activities

| User                   | Activities | Date/Time                | Remark |
|------------------------|------------|--------------------------|--------|
| EKAAUTH01 - EKA.AUTH01 | Save       | 16 Oct 2024 15:11:48 WIB |        |
| ADMNLITE - ADMNLITE    | Submit     | 16 Oct 2024 15:13:09 WIB |        |
| EKAAUTH01 - EKA.AUTH01 | Approve    | 16 Oct 2024 15:14:12 WIB |        |

Print

Done

User Pending Approval Tab

Tasklist > Acknowledgement

Change(s) approved

Reference No.: 11624101600001272 Approved On: 16 Oct 2024 15:14:11 WIB

Company Details

Company Name

Enrolled Date

Company ID

HUWA

10 Oct 2024 15:31:07 WIB

EKASITLITE

Account Maintenance

Contact Info

User

User Listing - Total 5 item(s) in the batch

| No. | User ID   | User Full Name | Mobile No.     | Email                     | Single Access User | Secure Token Type       | Sub-Action | Transaction Status |
|-----|-----------|----------------|----------------|---------------------------|--------------------|-------------------------|------------|--------------------|
| 1   | ADMNLITE  | ADMNLITE       | +623423423423  | AD@GMAIL.COM              | No                 | Secure Token (Software) |            |                    |
| 2   | EKAAUTH01 | EKA.AUTH01     | +62342313421   | AD@GMAIL.COM              | Yes                | Secure Token (Software) |            |                    |
| 3   | EKAMAKER1 | EKA.MAKER1     | 0111111111     | AD@GMAIL.COM              | No                 | Secure Token (Software) |            |                    |
| 4   | NEW USER  | Changren       | 090909090909   | changren@hanu01@gmail.com | Yes                |                         |            |                    |
| 5   | TEST1     | test1          | +6282166146312 | test1@gmail.com           | No                 |                         |            |                    |

User Activities

| User                   | Activities | Date/Time                | Remark |
|------------------------|------------|--------------------------|--------|
| EKAAUTH01 - EKA.AUTH01 | Save       | 16 Oct 2024 15:11:48 WIB |        |
| ADMNLITE - ADMNLITE    | Submit     | 16 Oct 2024 15:13:09 WIB |        |
| EKAAUTH01 - EKA.AUTH01 | Approve    | 16 Oct 2024 15:14:12 WIB |        |

Print

Done

Sistem akan menampilkan Halaman **Submitted for Approval**. **user** dapat melihat **detail submission** pada setiap tab nya

System will show the **Submitted for Approval** page. User can see the **submission details on every Tab**



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

