

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

SysAdmin

Contact Info Update

TUTORIALOCTOBIZ2025

KEJAR MIMPI

SysAdmin

Contact Info Update

SysAdmin – Contact Info Update digunakan untuk melakukan **edit atau penambahan kontak akun pengguna** melalui menu ***manage company***. Berlaku untuk pengkinian serta **penambahan data *email* dan nomor ponsel**

SysAdmin - Contact info Update is used for ***edit or add user contact info*** using Manage Company Menu. Applicable for ***update and add email and mobile numbers***

SysAdmin

Contact Info Update

Edit

Add

Contact Purpose (Applicable in Contact Info Listing)	Remarks
Admin	• untuk Contact Purpose sebagai "Admin", akan mendapat Welcome letter setelah proses Company Onboarding Selesai <i>To contact purpose as "Admin", will get the Welcome Letter after Company Onboarding Process succeed</i> • Contact Purpose digunakan di dalam Layout Payment Advice <i>Contact Purpose is used on Payment Advice Layout</i> • Pada Layout Payment Advice, akan diprioritaskan menggunakan Contact Purpose dengan tag "Cash" <i>In the Payment Advice layout, the system will prioritize using the Contact Purpose tagged as "Cash."</i>
Cash	• Jika tidak memiliki Contact Purpose dengan tag "Cash", maka dapat menggunakan Contact Purpose dengan Tag "Admin" <i>If there is no Contact Purpose tagged "Cash," then the Contact Purpose tagged "Admin" can be used</i> • Setiap Corporate ID, hanya dapat memiliki 1 contact info dengan Tag "Cash" <i>Each Corporate ID can have only one contact information entry tagged as "Cash."</i>

SysAdmin

Contact Info Update

Edit

Add

LANGKAH

01

MAKER



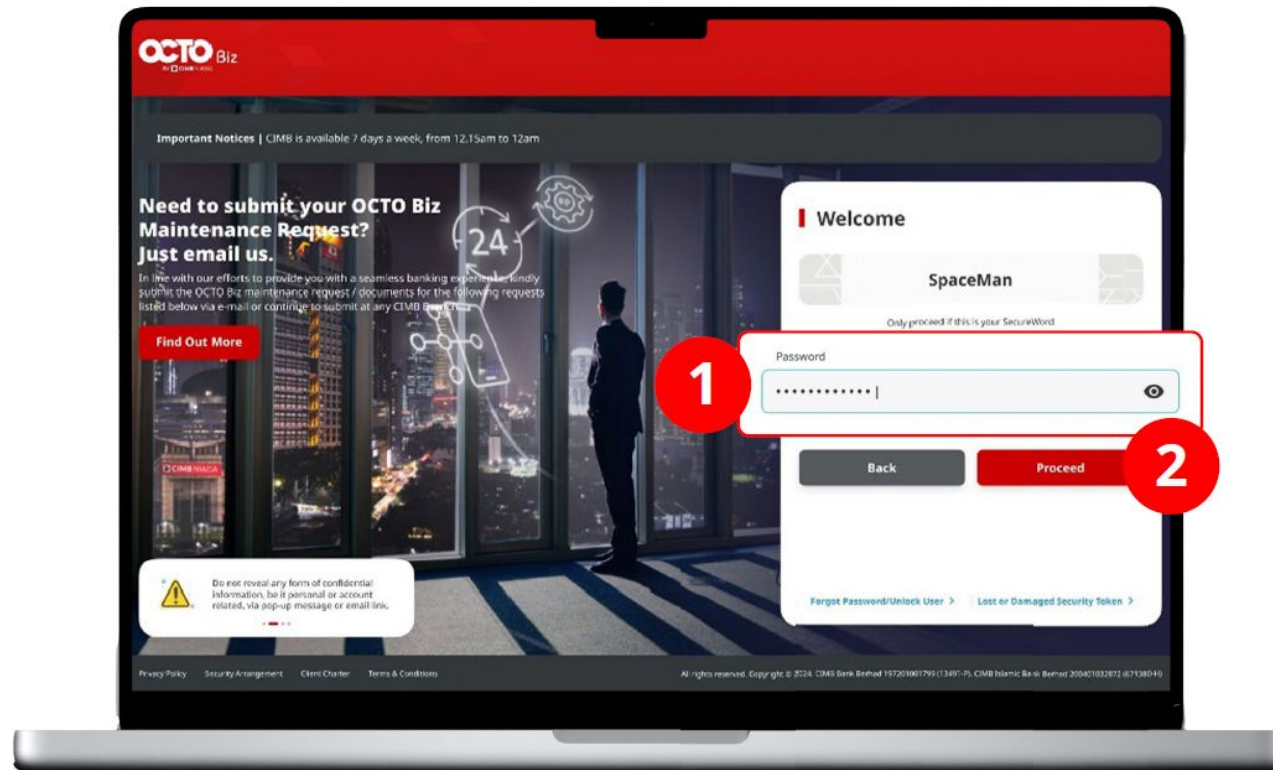
SysAdmin | Contact Info Update

Menu: Administration > Manage Company > Contact Info

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

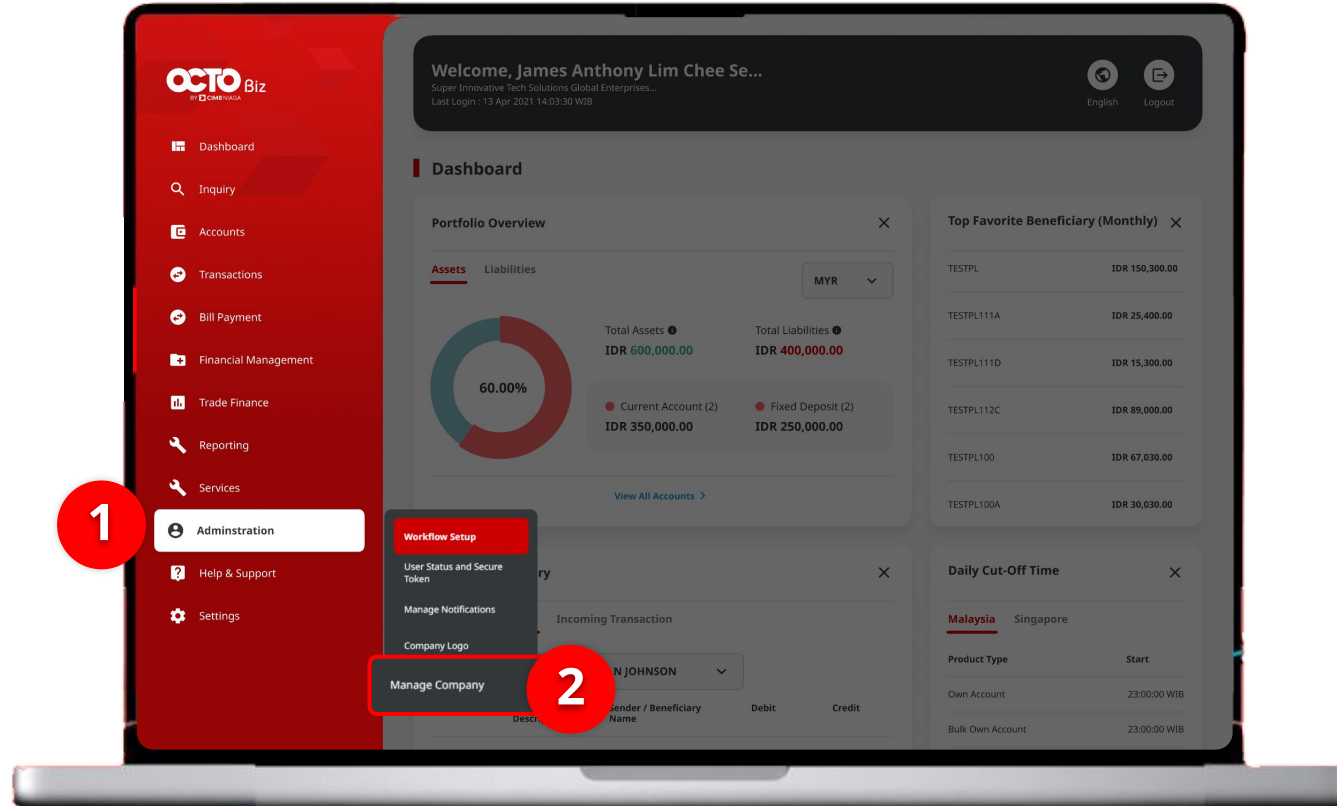
Login as SysAdmin Maker using User ID & Password

- 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**

OCTOBiz
BY CIMB NIAGA

Welcome, James Lee
BIZCHANNEL@CIMB
Last Login: 18 Nov 2025 18:52:13 WIB
No. of failed login attempts from previous session: 0

Notification Helpdesk English FAQ Logout

Manage Company > Details

Company Details

Company Name: OCTOBIZCIMB
Enrolled Date: 03 Feb 2021 16:42:09 WIB
Company ID: ID1234OCTOBIZ

Account Maintenance **1 Contact Info** Department Signature Type User Group User

Primary Contact Info

Name: JAMES LEE
Phone No.: +62212345678
Mobile No.: +6283812345678
Email: LEE.JAMES@GMAIL.COM

Contact Info Listing

No.	Name	Contact Purpose	Mobile No.	Email	Use Primary Contact	Display Contact Details
1	JAMES LEE	Admin	+6283812345678	LEE.JAMES@GMAIL.COM	Yes	Yes
2	MICHAEL LIU	Admin	+6287812345678	LIU.MICH@GMAIL.COM	Yes	Yes

2 Edit

Sistem akan menampilkan halaman
Manage Company > Details

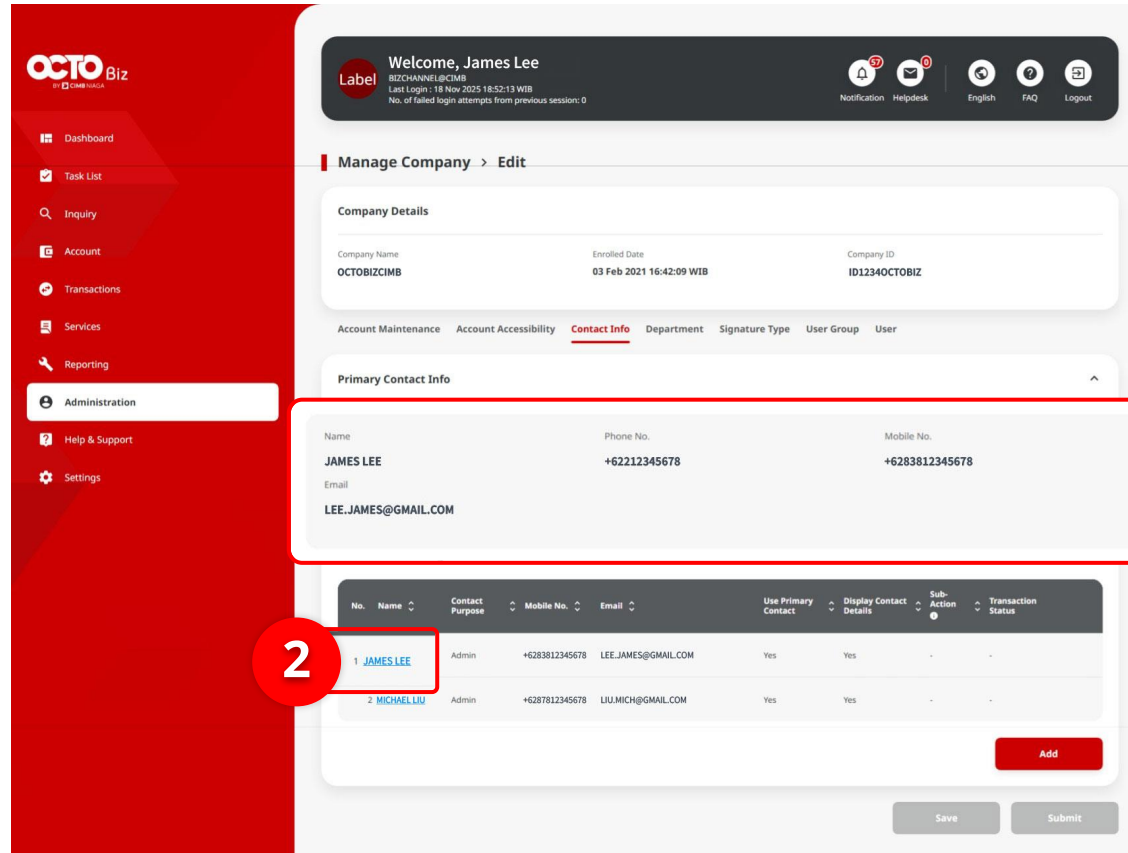
System will show the **Manage Company > Details** page

1 Pilih tab **Contact Info**

Choose **Contact Info**

2 Klik **Edit** untuk melakukan
Edit Contact info

Click **Edit** to do Edit Contact Info



Sistem akan menampilkan halaman
Manage Company > Edit

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

1 Primary Contact **tidak** dapat di **Edit**

The Primary Contact **is not** **editable**

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

Click the **Contact Info** hyperlink to edit the contact information recorded under **Admin** and **Cash**

The image shows two screenshots of the 'Contact Info Details' pop-up 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 and the 'Save' button. The bottom screenshot shows the form with the 'Use Primary Contact' checkbox selected. 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*

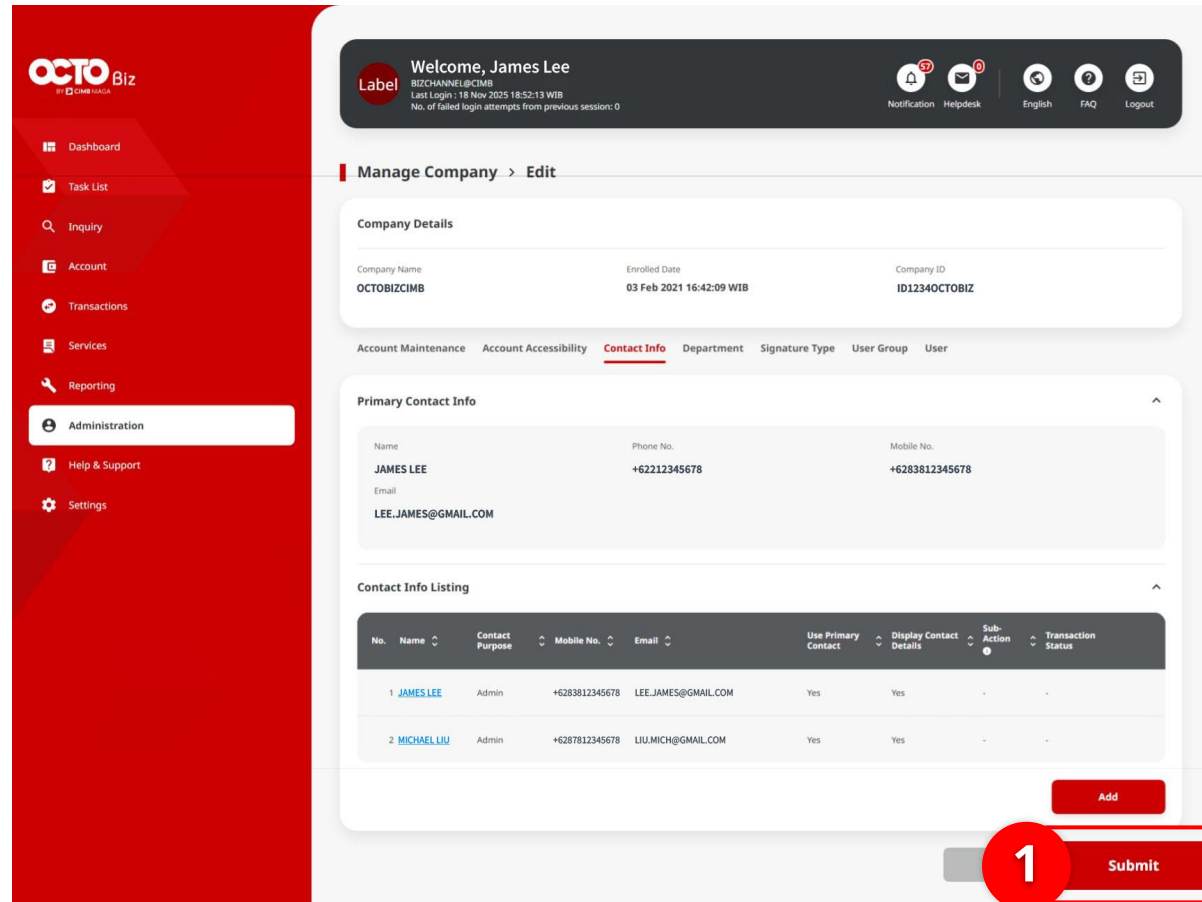
System will show the *Contact Info Details pop-up*

1 *Edit* Bagian yang dibutuhkan
Edit 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 field** is selected, the other sections will be disabled by the system and cannot be edited.*

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



Sistem akan menampilkan halaman **Manage Company > Edit** dengan data baru

System will show the **Manage Company > Edit** page with the updated data

1 Klik **Submit**

Click **Submit**

Tasklist > Acknowledgement

Submitted for approval

Reference No. : 11624101500001238Submitted On : 15 Oct 2024 17:30:13 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

+603423523423

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	+603423523423	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

Sistem akan menampilkan Halaman **Submitted for Approval**

System will show the **Submitted for Approval** page

SysAdmin

Contact Info Update

Edit

Add

LANGKAH

01

MAKER



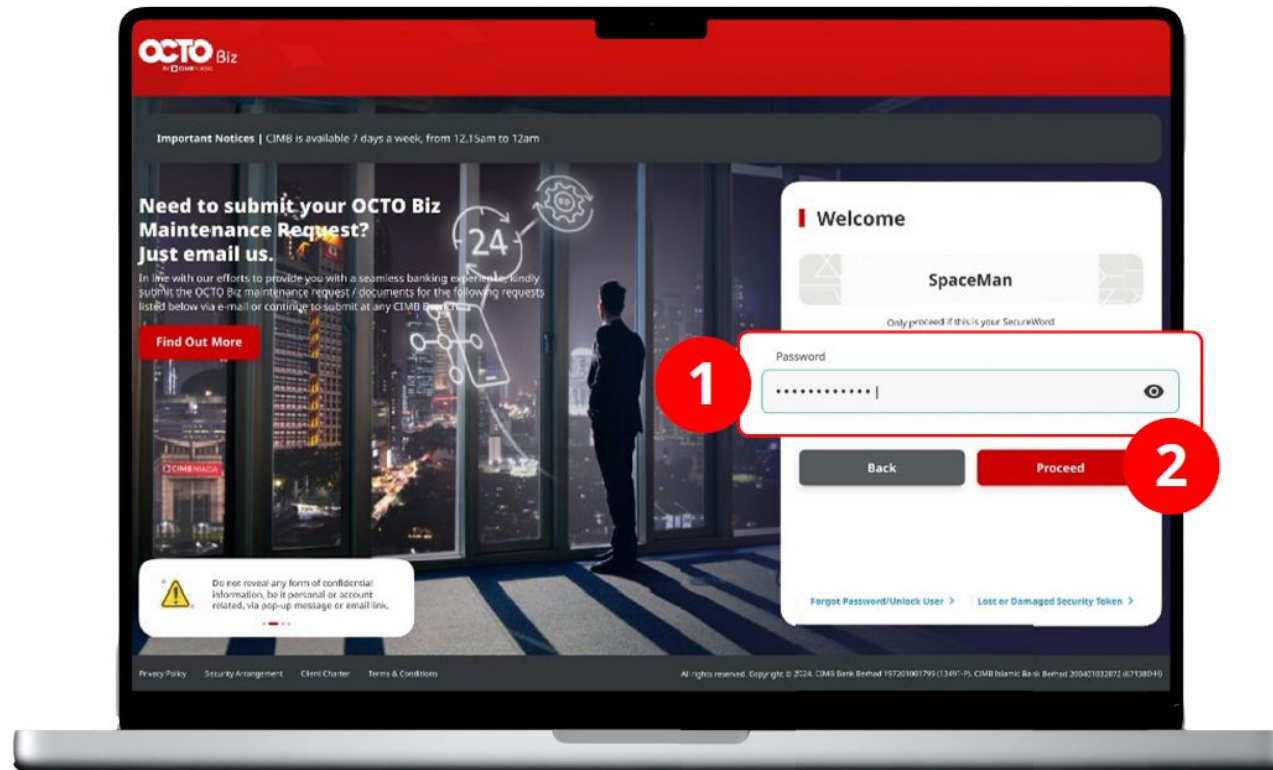
SysAdmin | Contact Info Update

Menu: Administration > Manage Company > Contact Info

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

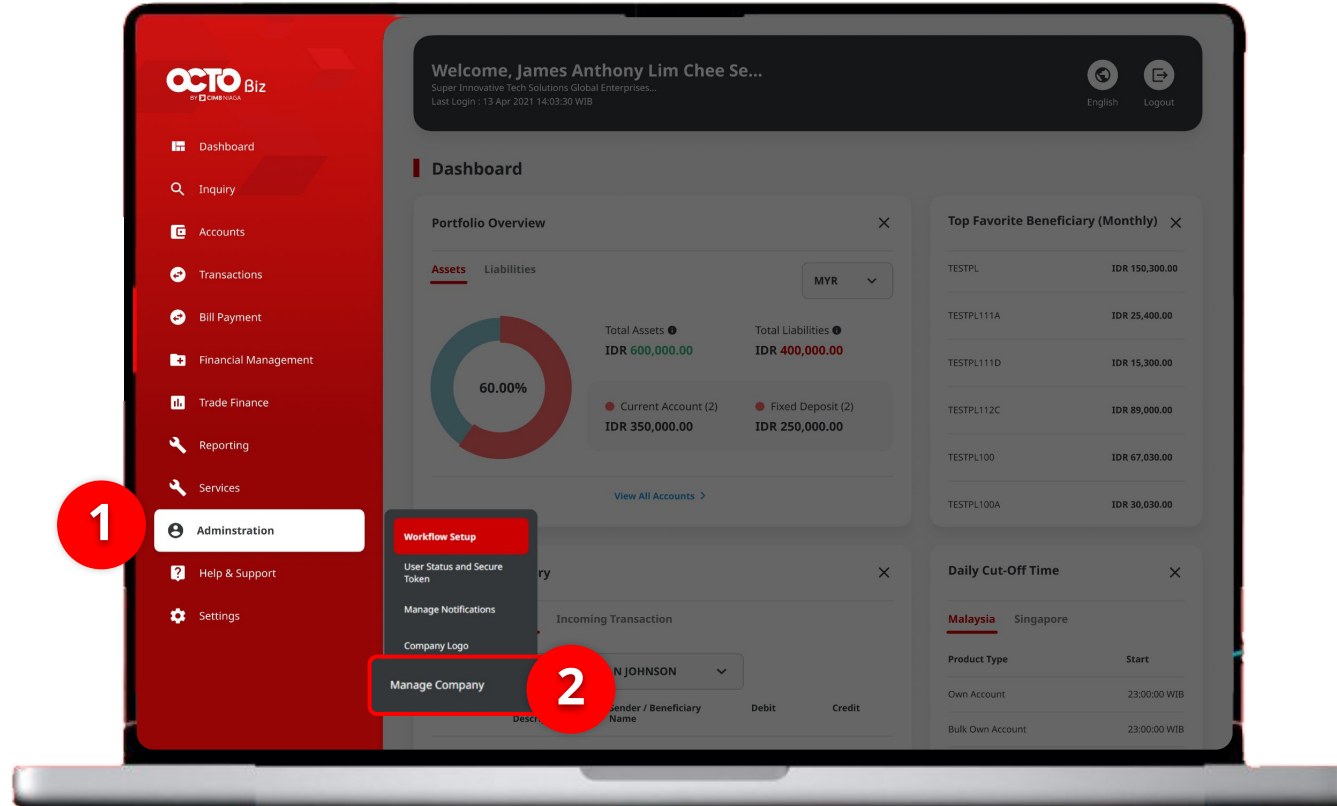
Login as SysAdmin Maker using User ID & Password

- 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**

OCTOBiz
BY CIMB NIAGA

Welcome, James Lee
BIZCHANNEL@CIMB
Last Login: 18 Nov 2025 18:52:13 WIB
No. of failed login attempts from previous session: 0

Notification Helpdesk English FAQ Logout

Manage Company > Details

Company Details

Company Name: OCTOBIZCIMB | Enrolled Date: 03 Feb 2021 16:42:09 WIB | Company ID: ID1234OCTOBIZ

Account Maintenance **1 Contact Info** Department Signature Type User Group User

Primary Contact Info

Name: JAMES LEE | Phone No.: +62212345678 | Mobile No.: +6283812345678
Email: LEE.JAMES@GMAIL.COM

Contact Info Listing

No.	Name	Contact Purpose	Mobile No.	Email	Use Primary Contact	Display Contact Details
1	JAMES LEE	Admin	+6283812345678	LEE.JAMES@GMAIL.COM	Yes	Yes
2	MICHAEL LIU	Admin	+6287812345678	LIU.MICH@GMAIL.COM	Yes	Yes

2 Edit

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

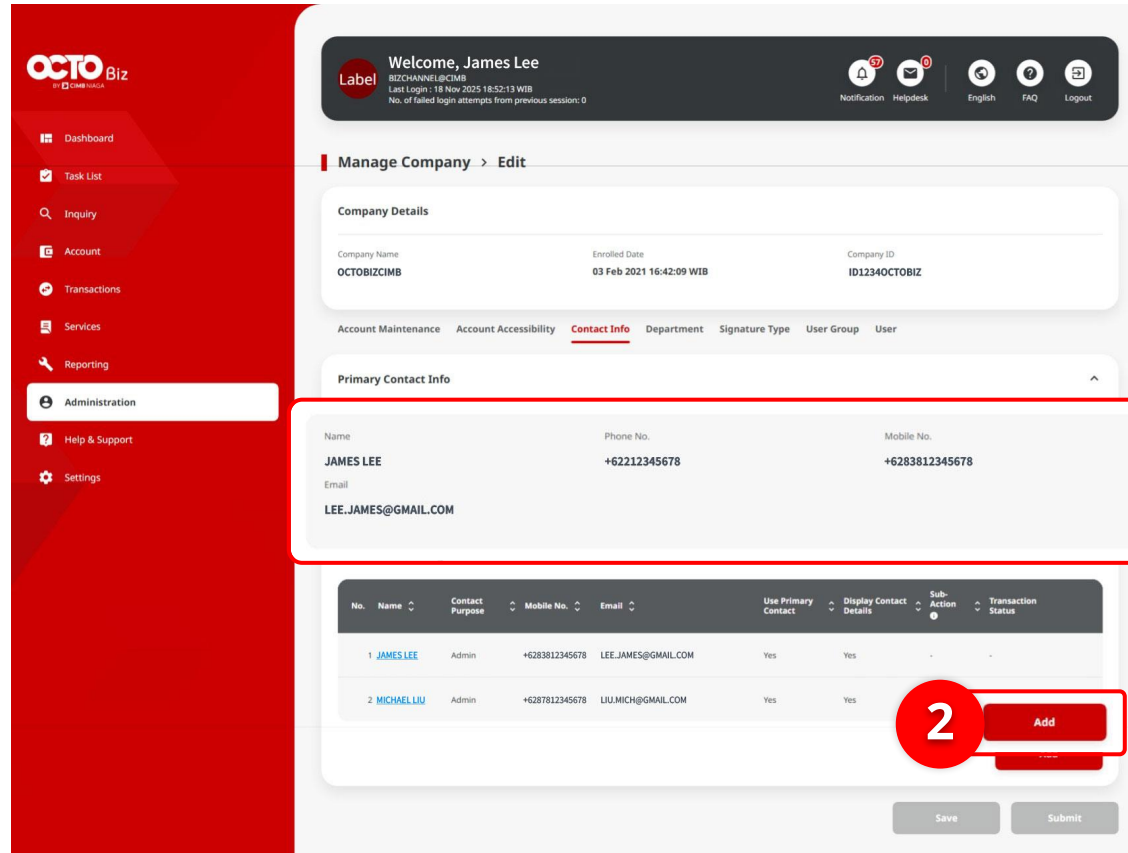
System will show the **Manage Company > Details** page

1 Pilih tab **Contact Info**

Choose **Contact Info**

2 Klik **Edit** untuk melakukan **Edit Contact info**

Click **Edit** to do Contact Info Edit



Sistem akan menampilkan halaman
Manage Company > Edit

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

1 Primary Contact **tidak** dapat di **Edit**

The Primary Contact **is not** **editable**

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

Click the **Contact Info** hyperlink to edit the contact information recorded under **Admin** and **Cash**

LANGKAH

06

MAKER

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'. Another red box labeled '2' highlights the 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 third 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).

SysAdmin | Contact Info Update

Menu: Administration > Manage Company > Contact Info

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

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

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

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

Note: If the **Primary Contact** box is selected, the other sections **cannot be edited**.

OCTOBiz
BY CIMB NIAGA

Welcome, James Lee
BIZCHANNEL@CIMB
Last Login: 18 Nov 2025 18:52:13 WIB
No. of failed login attempts from previous session: 0

Notification Helpdesk English FAQ Logout

Manage Company > Edit

Company Details

Company Name OCTOBIZCIMB	Enrolled Date 03 Feb 2021 16:42:09 WIB	Company ID ID1234OCTOBIZ
-----------------------------	---	-----------------------------

Account Maintenance Account Accessibility **Contact Info** Department Signature Type User Group User

Primary Contact Info

Name JAMES LEE	Phone No. +62212345678	Mobile No. +6283812345678
Email LEE.JAMES@GMAIL.COM		

Contact Info Listing

No.	Name	Contact Purpose	Mobile No.	Email	Use Primary Contact	Display Contact Details	Sub-Action	Transaction Status
1	JAMES LEE	Admin	+6283812345678	LEE.JAMES@GMAIL.COM	Yes	Yes	-	-
2	MICHAEL LIU	Admin	+6287812345678	LIU.MICH@GMAIL.COM	Yes	Yes	-	-

Add

1 Submit

Sistem akan menampilkan halaman **Manage Company > Edit** dengan data baru

System will show the **Manage Company > Edit** page with the updated data

1 Klik **Submit**

Click **Submit**

Tasklist > Acknowledgement

Submitted for approval

Reference No. : 11624101500001238Submitted On : 15 Oct 2024 17:30:13 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

+603423523423

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	+603423523423	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

Sistem akan menampilkan Halaman **Submitted for Approval**

System will show the **Submitted for Approval** page

Contact Info Update **Approval Process**

LANGKAH

01

APPROVER



Approval Process | Manage Company

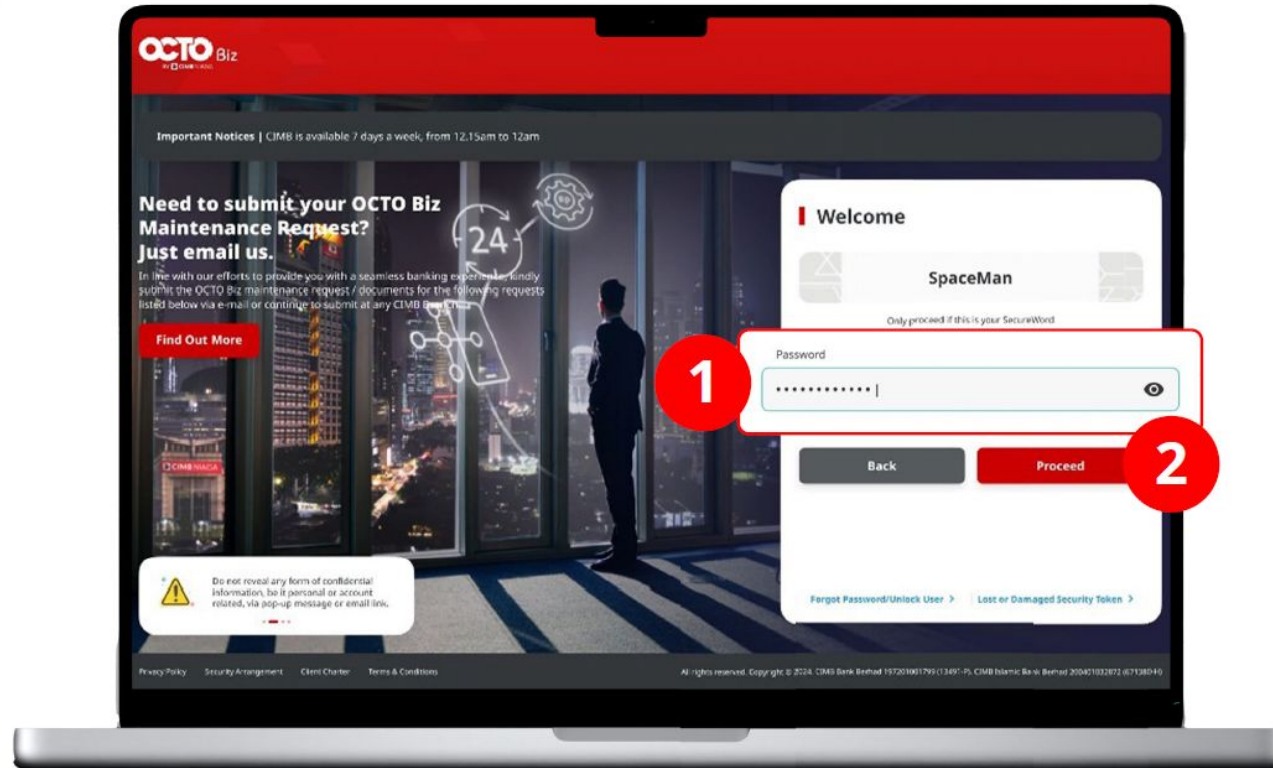
Menu: Administration > Manage Company > Contact Info

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

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

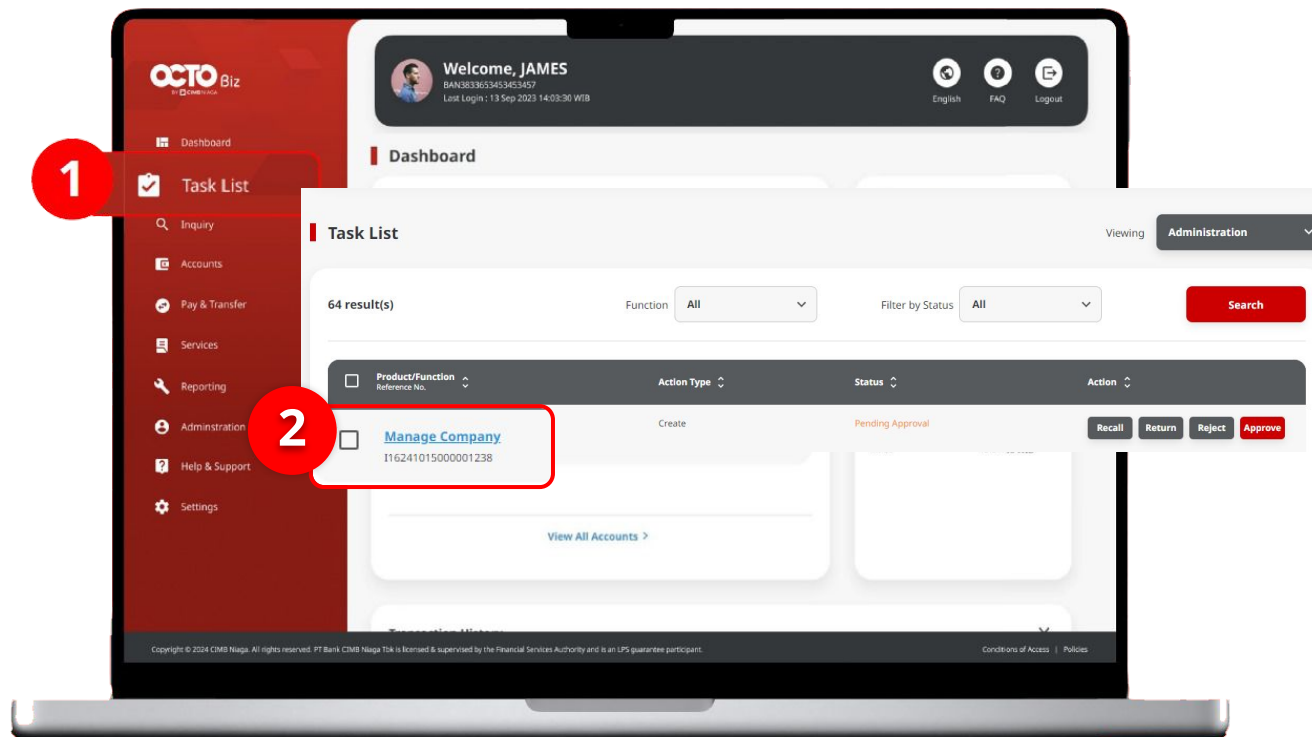
- 2 Klik **Next**

*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	NEWUSER	Changpreet	0999999999	changpreet@msa01@gmail.com	Yes	-	-	-
5	TEST1	test1	+6282166145119	test1@gmail.com	No	Mobile	-	-

User Activities

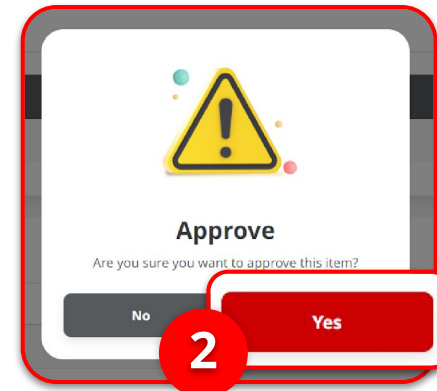
User	Activities	Date/Time	Remark
TEST1 - test1	Save	15 Oct 2024 17:12:21 WIB	
TEST1 - test1	Submit	15 Oct 2024 17:30:13 WIB	

Remark

Remarks: Enter

Maximum 100 characters

Back Recall Return **Approve**



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

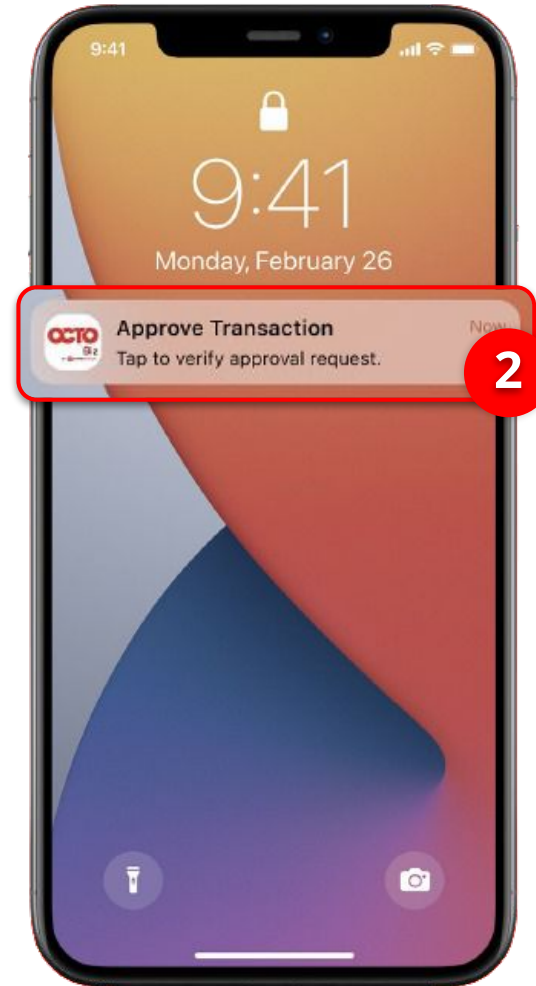
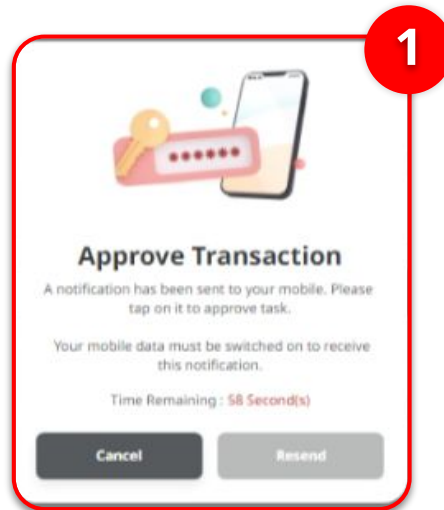
Review Transaction

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 > Contact Info

The screenshot shows a mobile application interface titled "Mobile Token" with a close button (X) in the top right corner. Below the title is a lock icon and the text "Approve Transaction". A timer indicates "Time Remaining : 37 Second(s)". The transaction details are as follows:

Reference No.	I16231206000000305
Submitted On	06 Dec 2023 15:15:19 WIB
Company ID	CORPGRITE

A "Note" section contains the following text:

Note
If you did not perform this transaction, please call our Business Call Centre immediately for assistance.
14042 (Local)
+6221 80655111 (Overseas)

Monday to Friday from 8:00AM to 7:00PM
Saturday from 8:00AM to 5:00PM
(excluding public holidays).

At the bottom, there are two buttons: "Reject" and "Approve". The "Approve" button is highlighted with a red box and a red circle with the number "1" next to it.

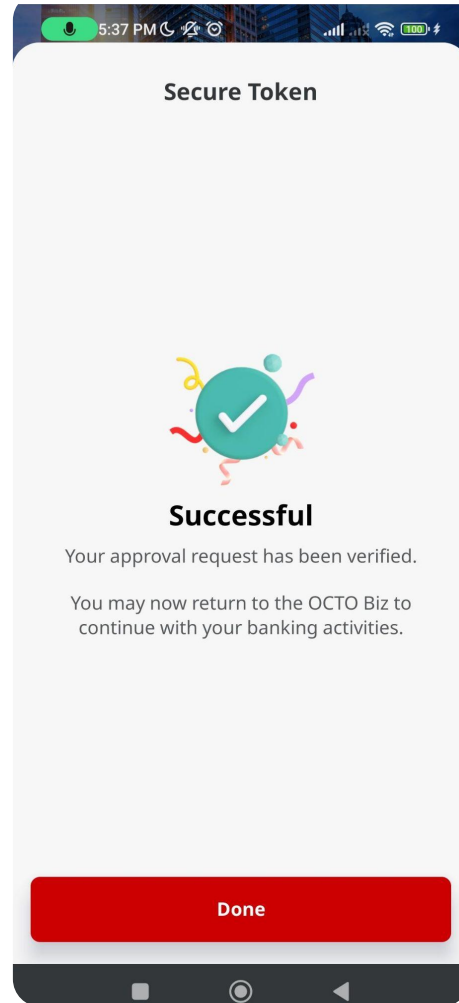
The screenshot shows a modal window titled "Enter PIN" with a close button (X) in the top right corner. It features a key icon and the text "Enter PIN". Below this, it says "Please enter a 6-digit PIN." and displays six empty circles for input. A red box and a red circle with the number "2" highlight the input field.

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***

Tasklist > Acknowledgement

Change(s) approved 

Reference No.: 116241016000001272 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	+603423523423
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	+603423523423	AD@GMAIL.COM	Yes	Yes	-	-

User Activities

User	Activities	Date/Time	Remark
EKAAUTH01 - EKA AUTH0 1	Save	16 Oct 2024 15:11:48 WIB	
ADMINLITE - ADMINLITE	Submit	16 Oct 2024 15:13:09 WIB	
EKAAUTH01 - EKA AUTH0 1	Approve	16 Oct 2024 15:14:12 WIB	

Print Done

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

Once Succeed, system will show the Acknowledgement page



OCTO Biz
BY  **CIMB NIAGA**

