

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

Account & Dashboard

Dashboard

TUTORIALOCTOBIZ2025

KEJAR MIMPI

Account & Dashboard

Dashboard

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

03

Dashboard

12

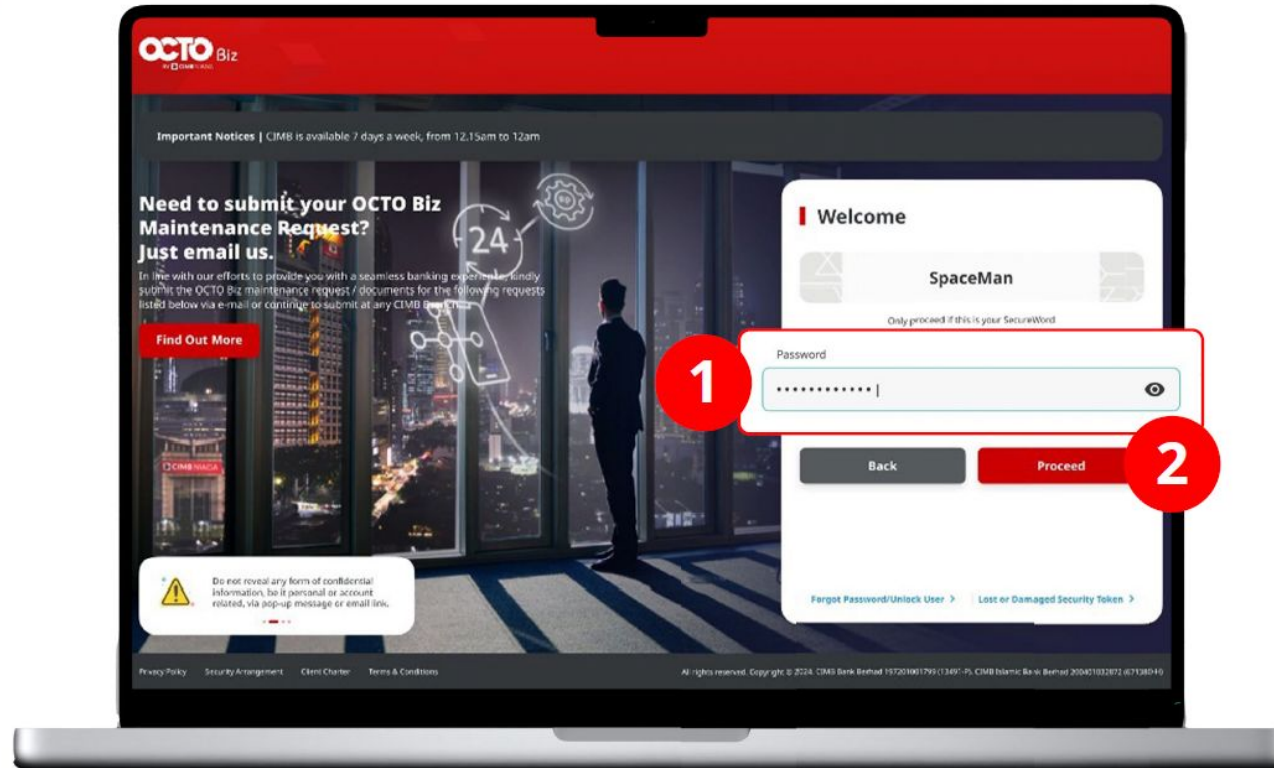
Personalized
Dashboard

Dashboard

Dashboard

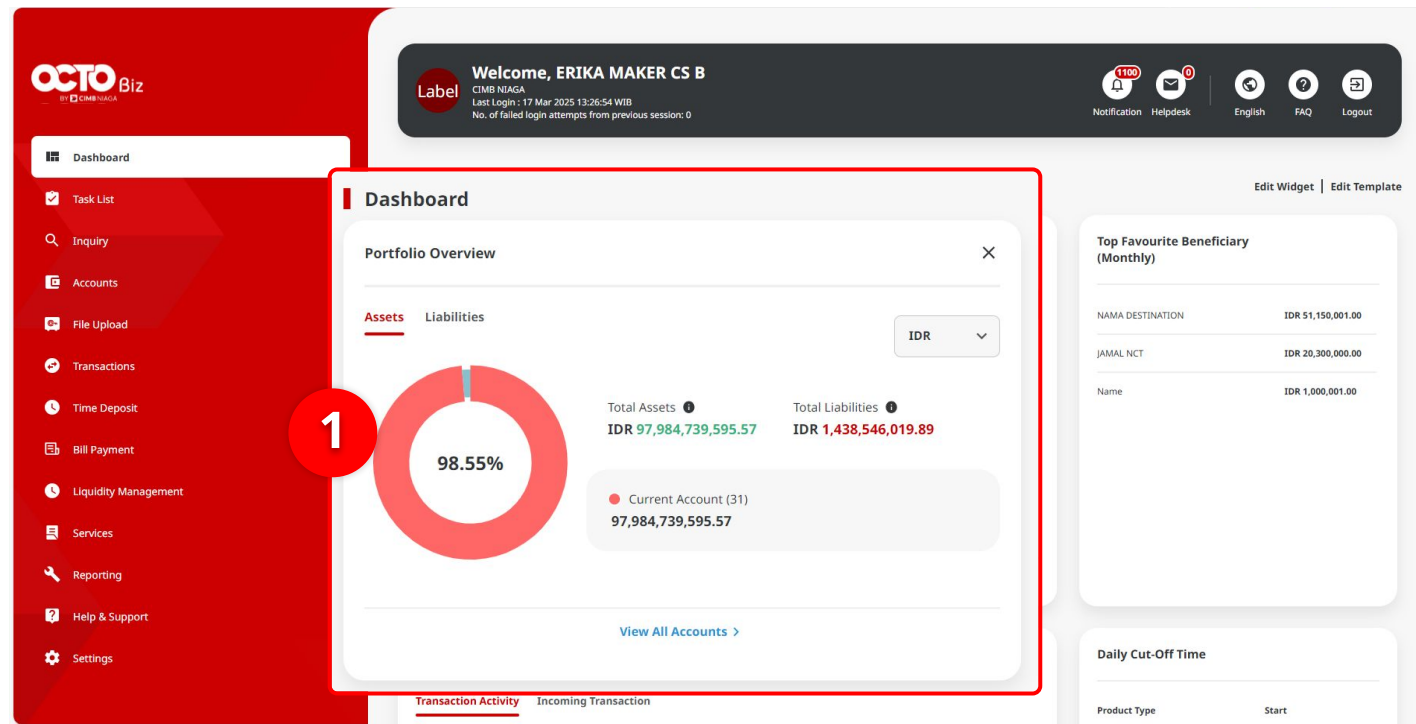


- 1 Kunjungi Website OCTO Biz di: **www.octobiz.co.id**
- 2 Masuk dengan menggunakan **User & Company ID**
- 3 Klik **Next**



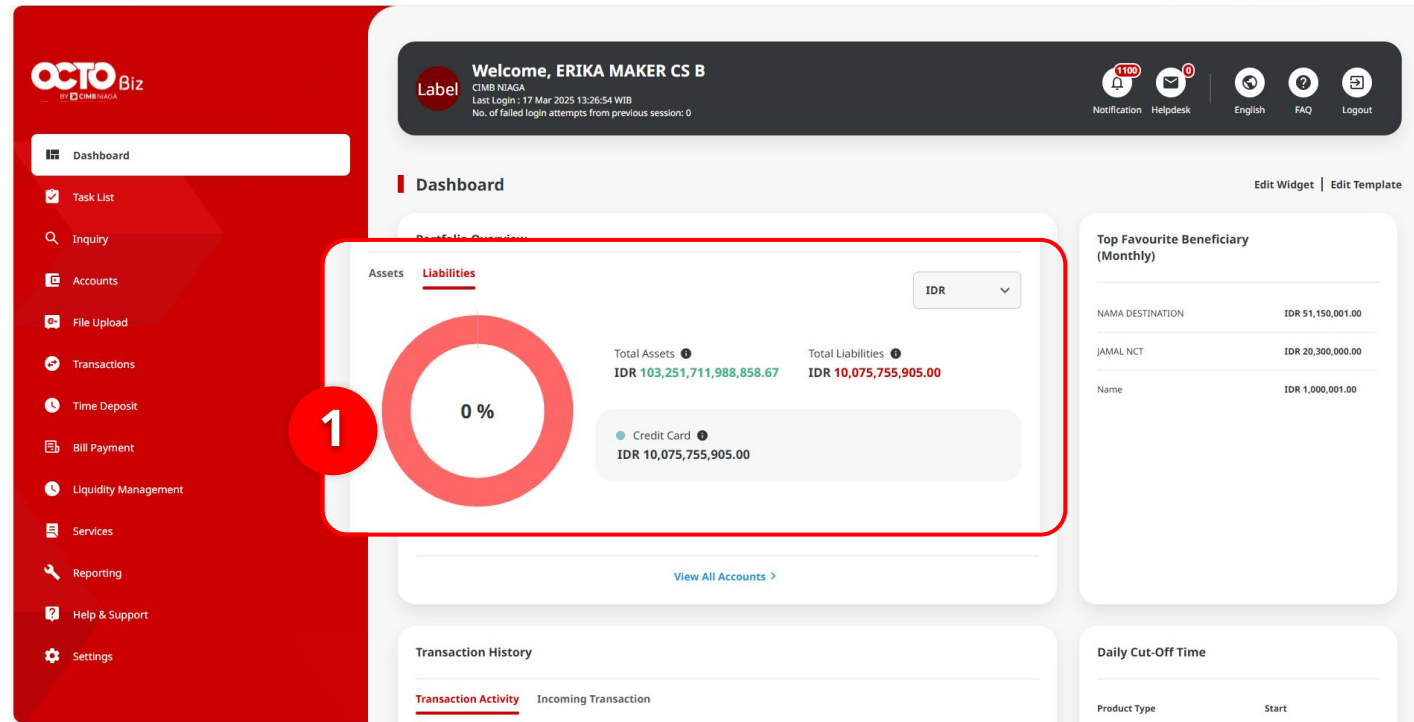
1 Isi **Password**

2 Klik **Proceed**



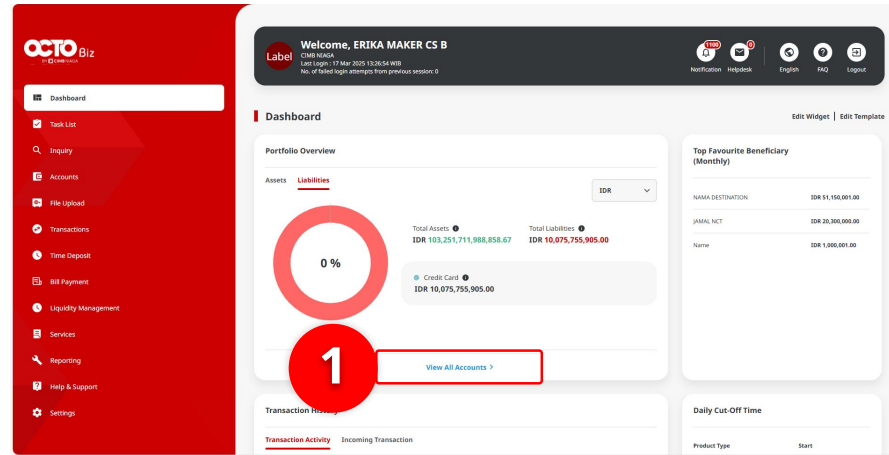
Sistem akan menampilkan halaman **Dashboard**

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



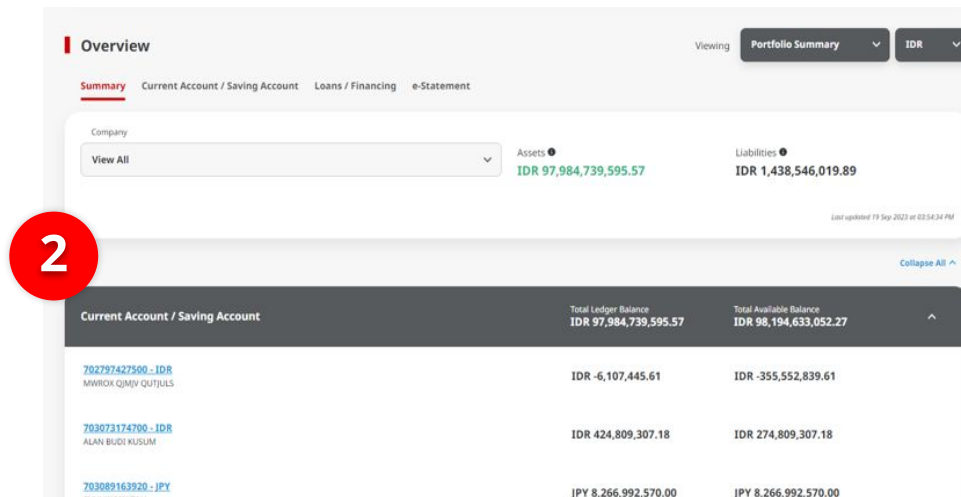
Sistem akan menampilkan halaman ***Dashboard***

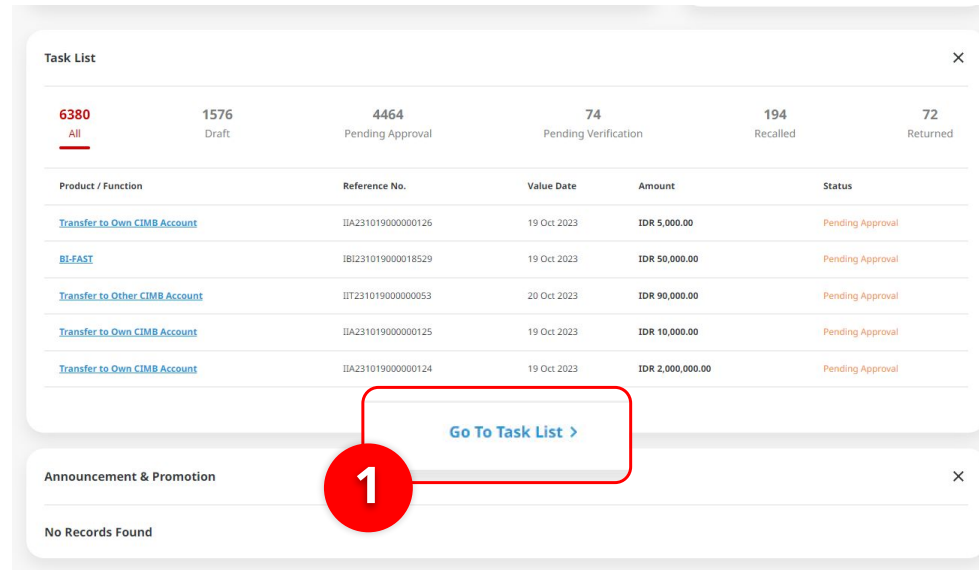
- 1 Klik ***Liabilities***, untuk melihat *overview*



1 Klik **View All Accounts**

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

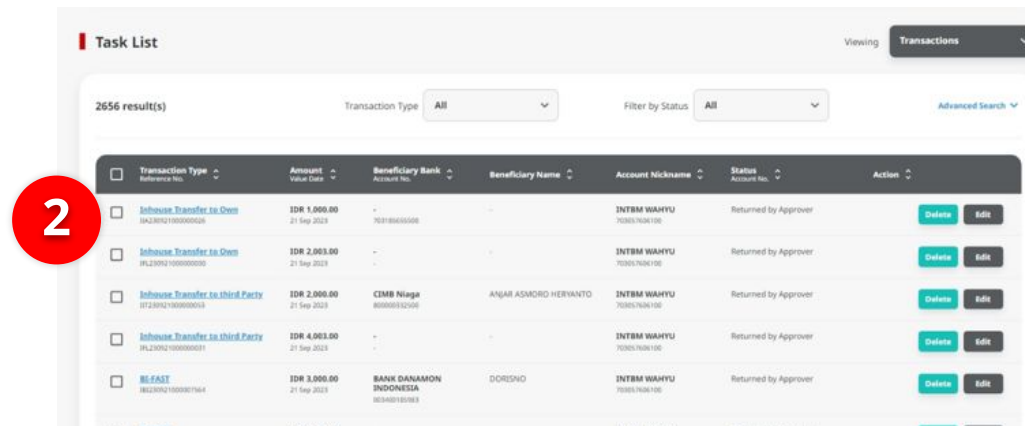




Untuk melihat Task list melalui dashboard

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

2 Sistem akan menampilkan halaman **Task List**



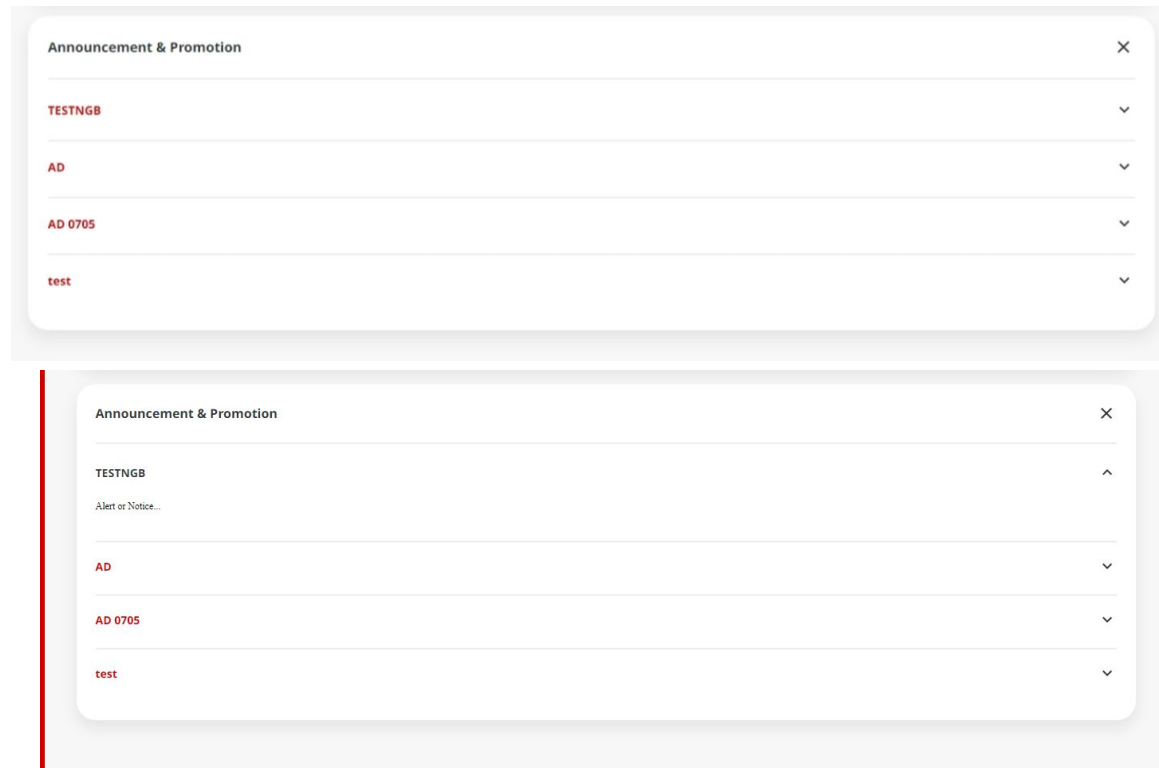
Daily Cut-Off Time

×

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



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

Account

Personalized Dashboard

Edit Widget

Edit Template

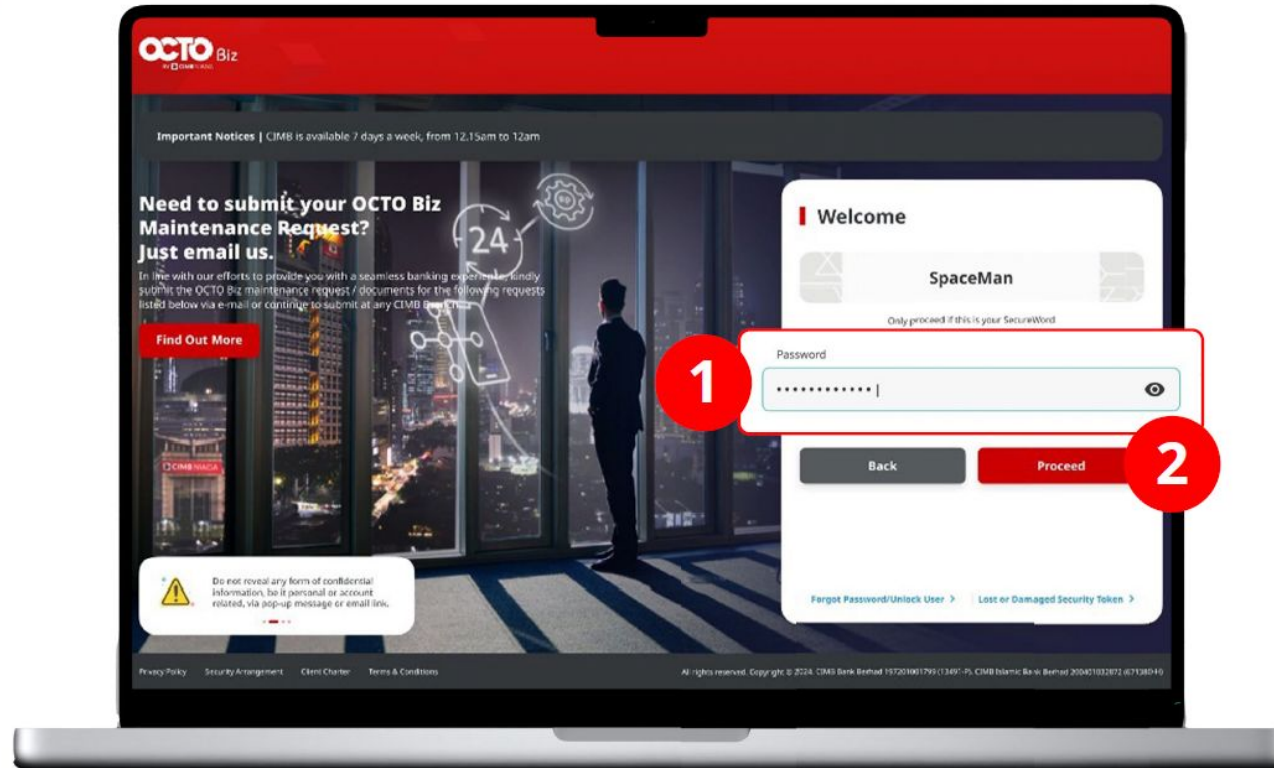
Account

Personalized Dashboard

Edit Widget



- 1 Kunjungi Website OCTO Biz di: **www.octobiz.co.id**
- 2 Masuk dengan menggunakan **User & Company ID**
- 3 Klik **Next**



1 Isi **Password**

2 Klik **Proceed**

1 Edit Widget

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 GA	240315803002529	0.00	\$2,000.00
12 Mar 2024	OVERBOOKING FROM SA	240312803005208	0.00	120,000.00

[View All >](#)

Portfolio Accounts

Assets Liabilities

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 Overseas 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
User Status and Secure Token Maintenance	115740518000001474	-	IDR 0.00	Pending Approval
Manage Notifications	117240227000000385	-	IDR 0.00	Pending Approval

[Go to Task list >](#)

Announcement & Promotion

TEST NO EXPIRED

AD - UAT Test

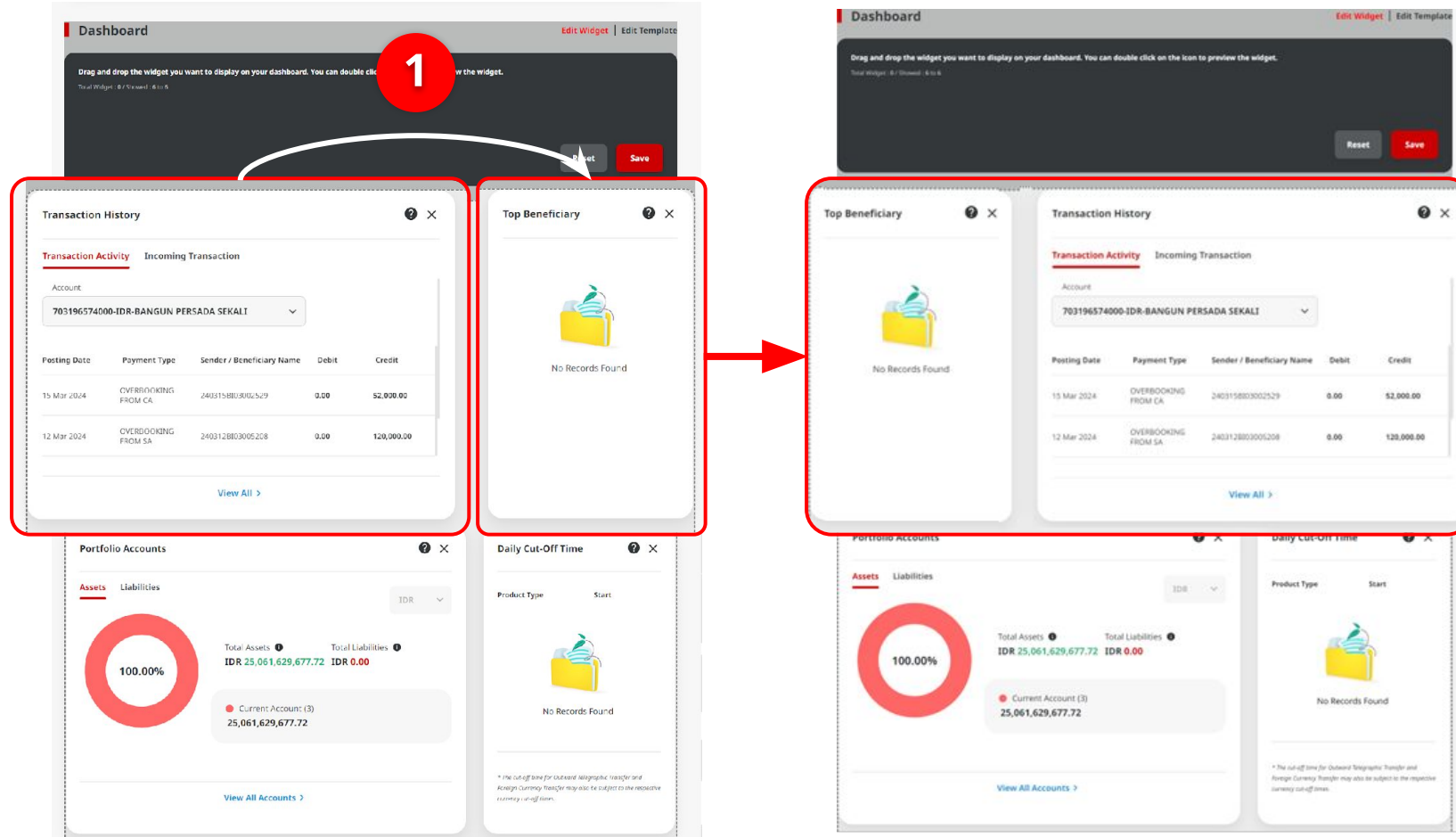
testttt

TESTNGB

Test Alert & Notices 5

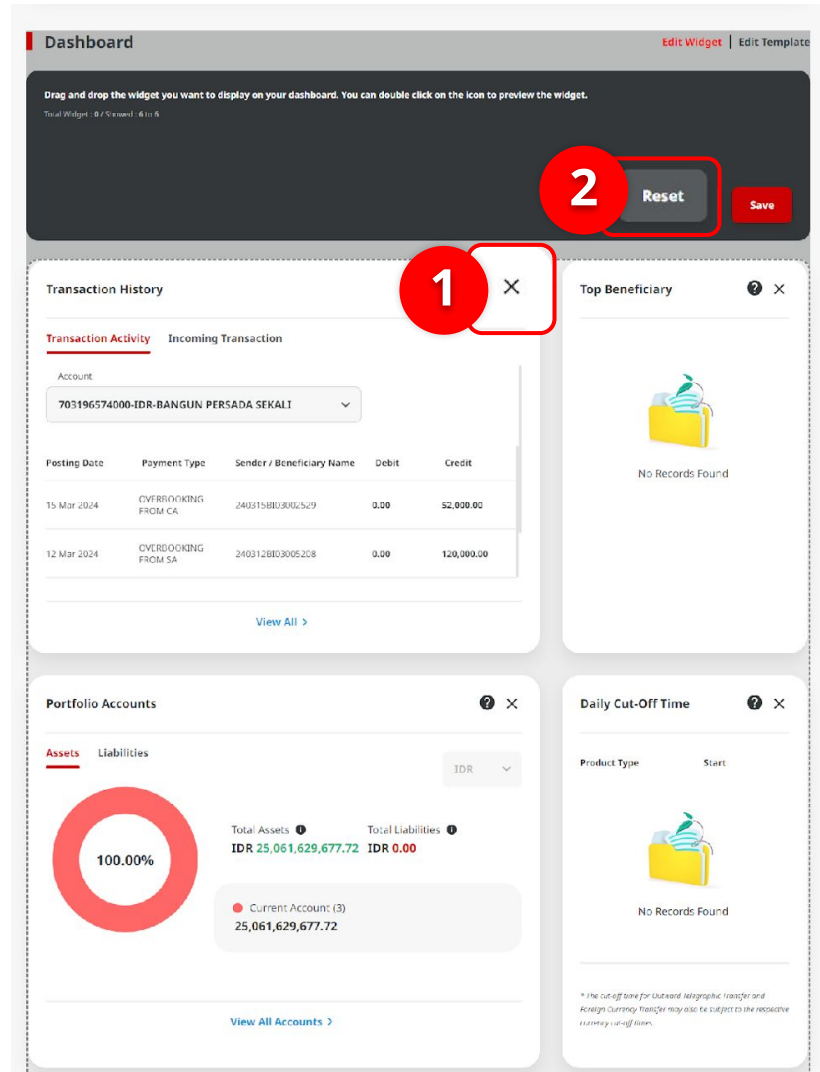
Sistem akan menampilkan halaman **Dashboard**

1 Scroll kebawah, Klik **Edit Widget**



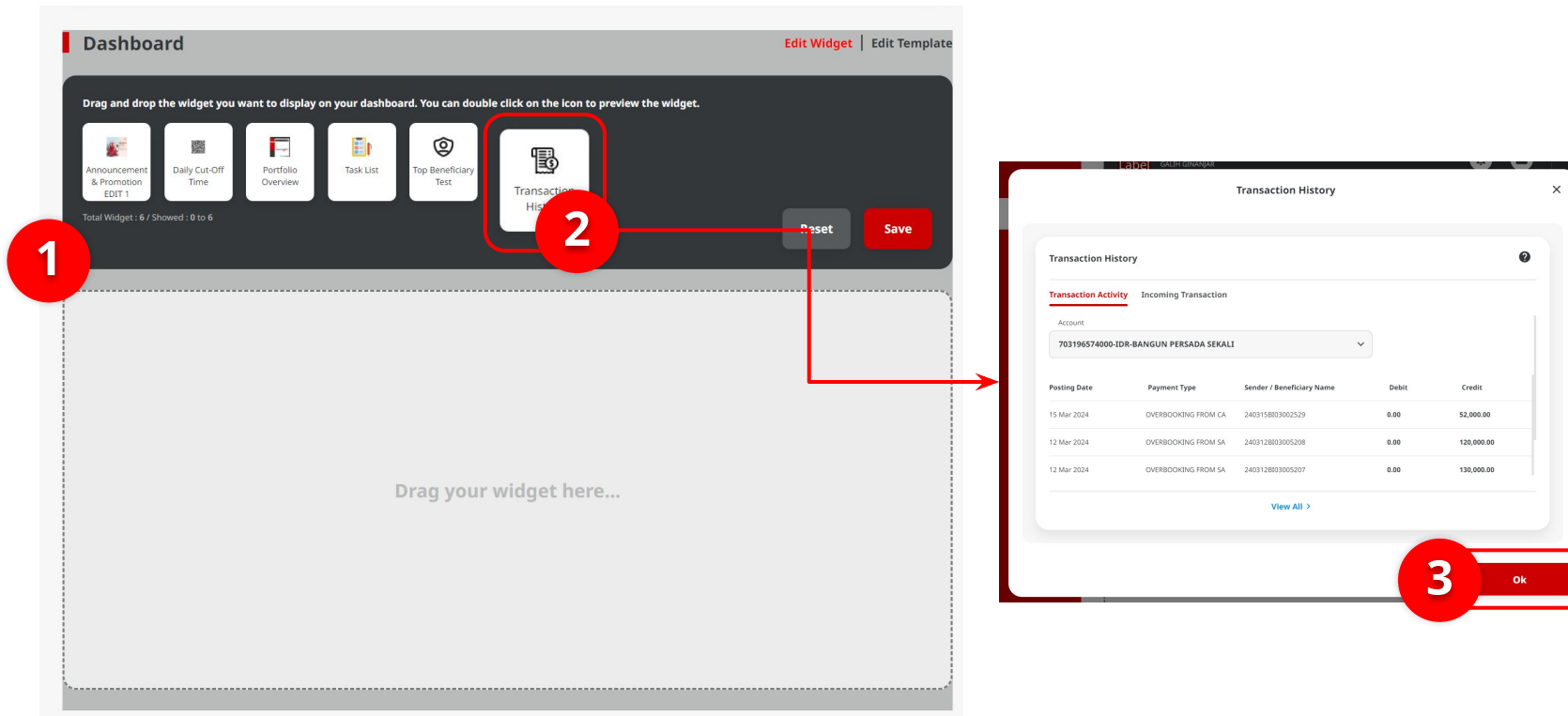
System akan menampilkan halaman **Edit Dashboard**

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



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

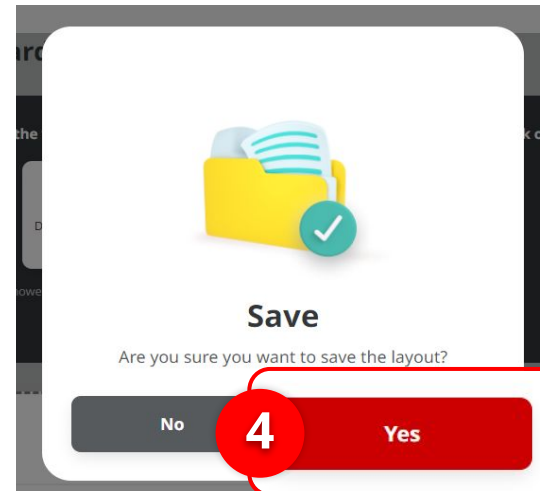
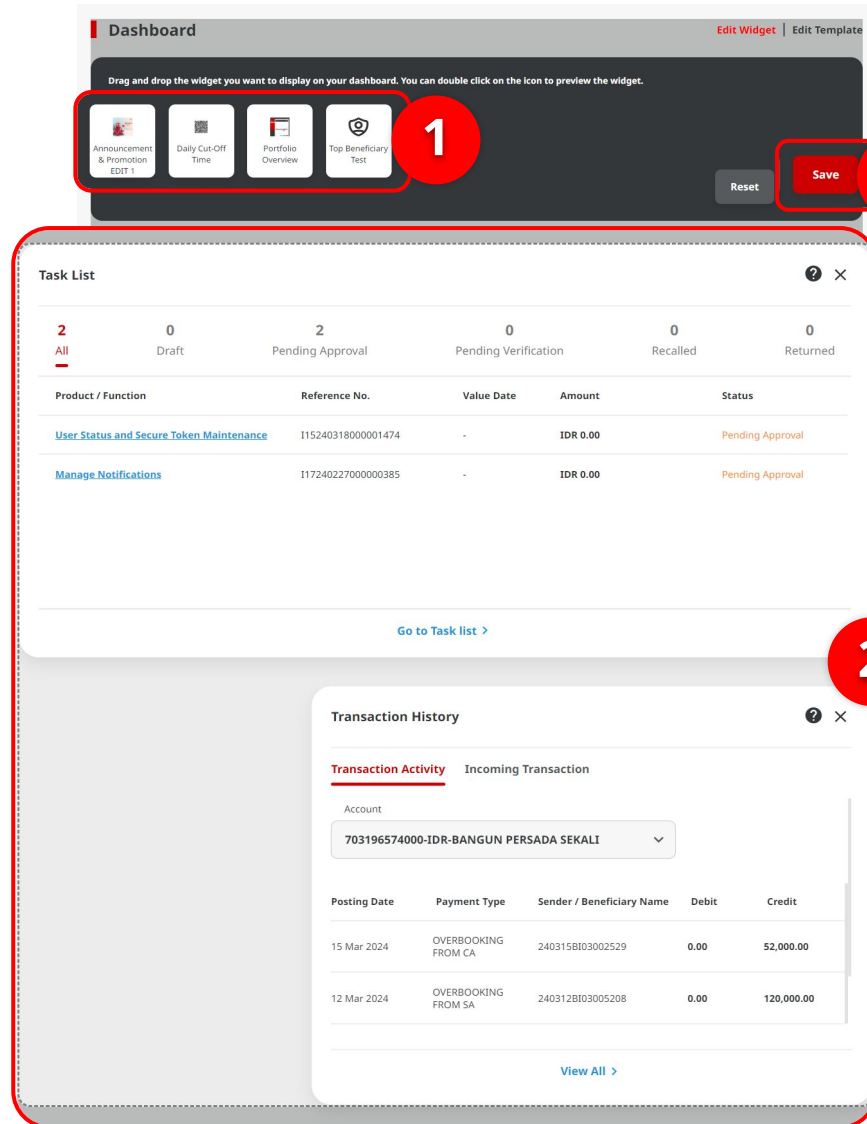
2 User dapat mengembalikan **pengaturan default** dengan klik pada tombol **Reset**



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*



1 Widget dapat dipindahkan ke **Dashboard** dibawah

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

3 Klik **Save**

4 Klik **Yes**

Dashboard

Edit Widget | Edit Template

Request successfully saved

Reference No. : 113240319000000081

Saved On : 19 Mar 2024 14:36:18 WIB

Task List

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	115240318000001474	-	IDR 0.00	Pending Approval
Manage Notifications	117240227000000385	-	IDR 0.00	Pending Approval

Go to Task list >

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	\$2,000.00
12 Mar 2024	OVERBOOKING FROM SA	240312803005208	0.00	120,000.00

View All >

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

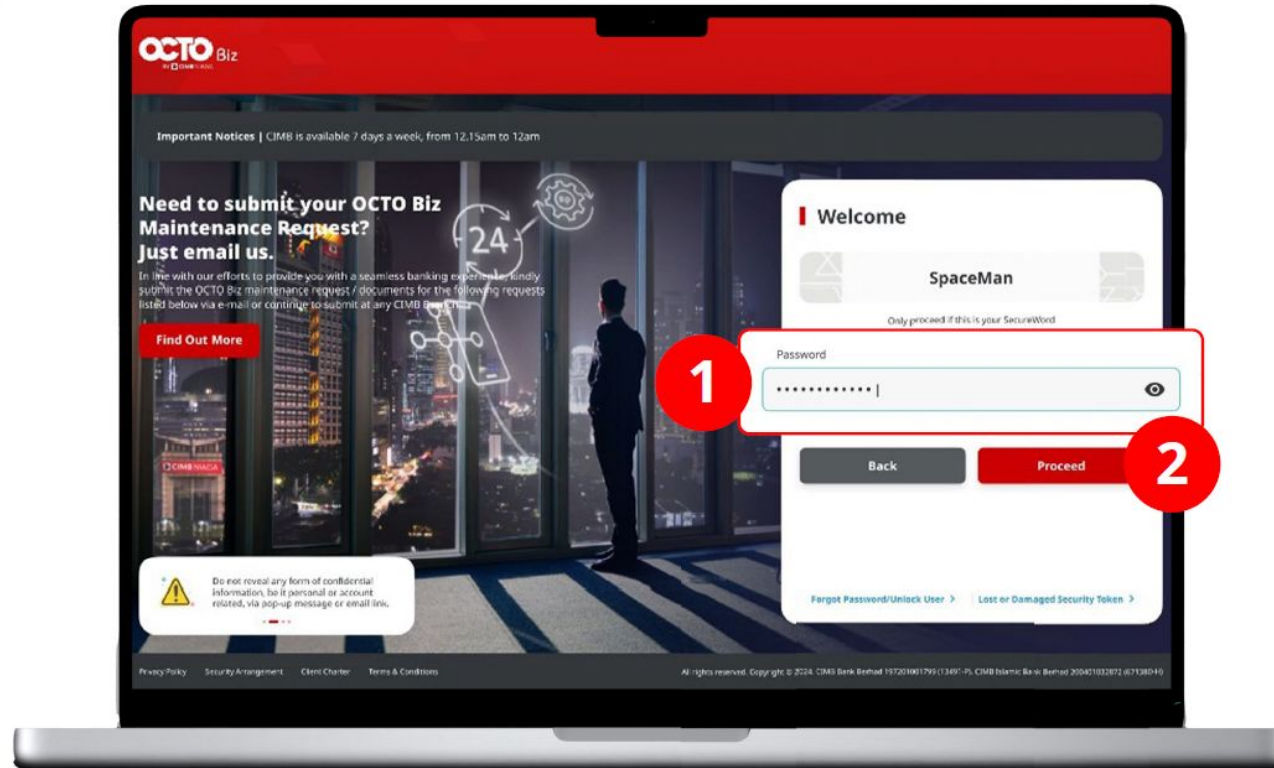
Account

Personalized Dashboard

Edit Template



- 1 Kunjungi Website OCTO Biz di: **www.octobiz.co.id**
- 2 Masuk dengan menggunakan **User & Company ID**
- 3 Klik **Next**



1 Isi **Password**

2 Klik **Proceed**

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	2403158803002529	0.00	\$2,000.00
12 Mar 2024	OVERBOOKING FROM SA	2403128803005208	0.00	120,000.00

[View All >](#)

Top Beneficiary

No Records Found

Task List

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	115740318030001474	-	IDR 0.00	Pending Approval	
Manage Notifications	117240227003000385	-	IDR 0.00	Pending Approval	

[Go to Task list >](#)

Portfolio Accounts

Assets Liabilities

IDR

100.00%

Total Assets Total Liabilities

IDR 25,061,629,677.72 IDR 0.00

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

[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.

Announcement & Promotion

TEST NO EXPIRED

AD - UAT Test

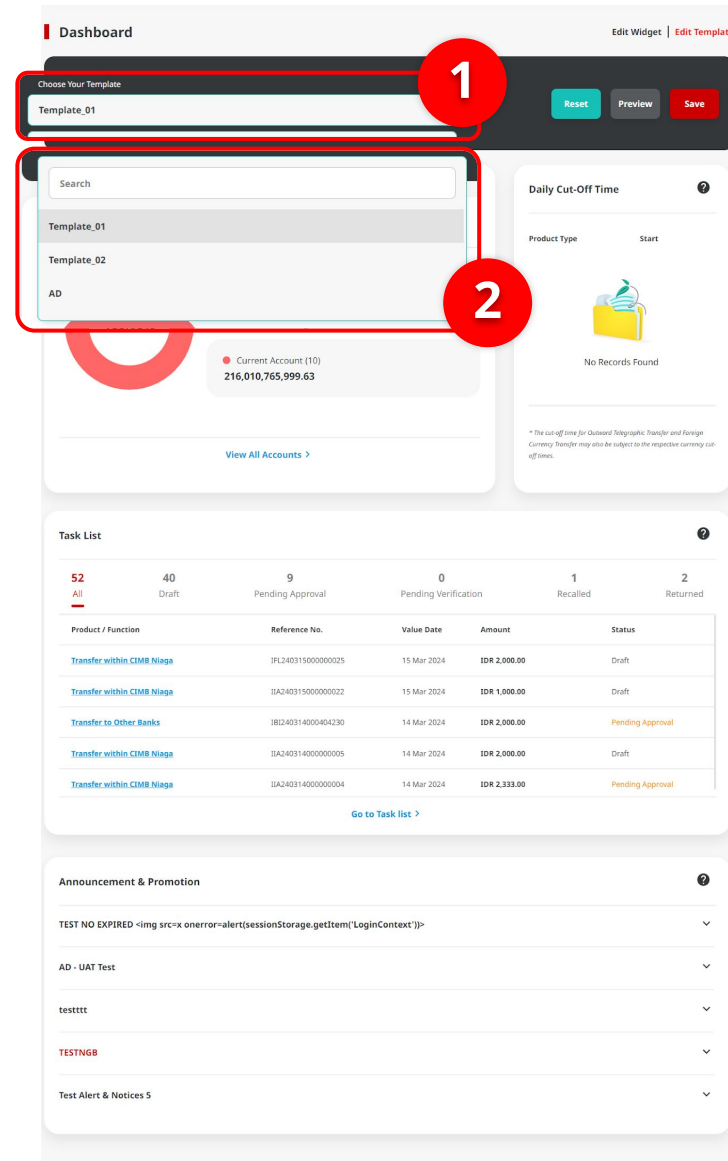
testttt

TESTNGB

Test Alert & Notices 5

Sistem akan menampilkan halaman **Dashboard**

1 Scroll kebawah, Klik **Edit Template**



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

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

40

9

0

1

2

All

Draft

Pending Approval

Pending Verification

Recalled

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	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 >

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

1

Dashboard

Preview Template

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

Task List

52

40

9

0

1

2

All

Draft

Pending Approval

Pending Verification

Recalled

Returned

Product / Function	Reference No.	Value Date	Amount	Status
Transfer within CIMB Niaga	3PL240315000000025	15 Mar 2024	IDR 2,000.00	Draft
Transfer within CIMB Niaga	3A240315000000022	15 Mar 2024	IDR 1,000.00	Draft
Transfer to Other Banks	3B240314000404230	14 Mar 2024	IDR 2,000.00	Pending Approval
Transfer within CIMB Niaga	3A240314000000005	14 Mar 2024	IDR 2,000.00	Draft
Transfer within CIMB Niaga	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	240318B03005256	1,000.00	0.00
14 Mar 2024	TR TO REMITT	240314B01658791	2,000.00	0.00
14 Mar 2024	TR TO REMITT	240314B01658787	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

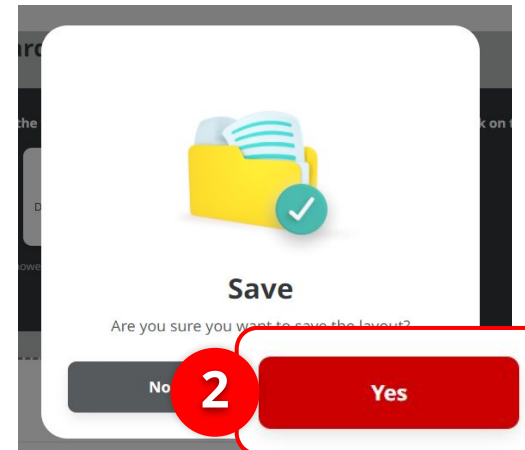
0 Pending Verification

1 Recalled

2 Returned

Product / Function	Reference No.	Value Date	Amount	Status
Transfer within CIMB Niaga	JPL240315000000025	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

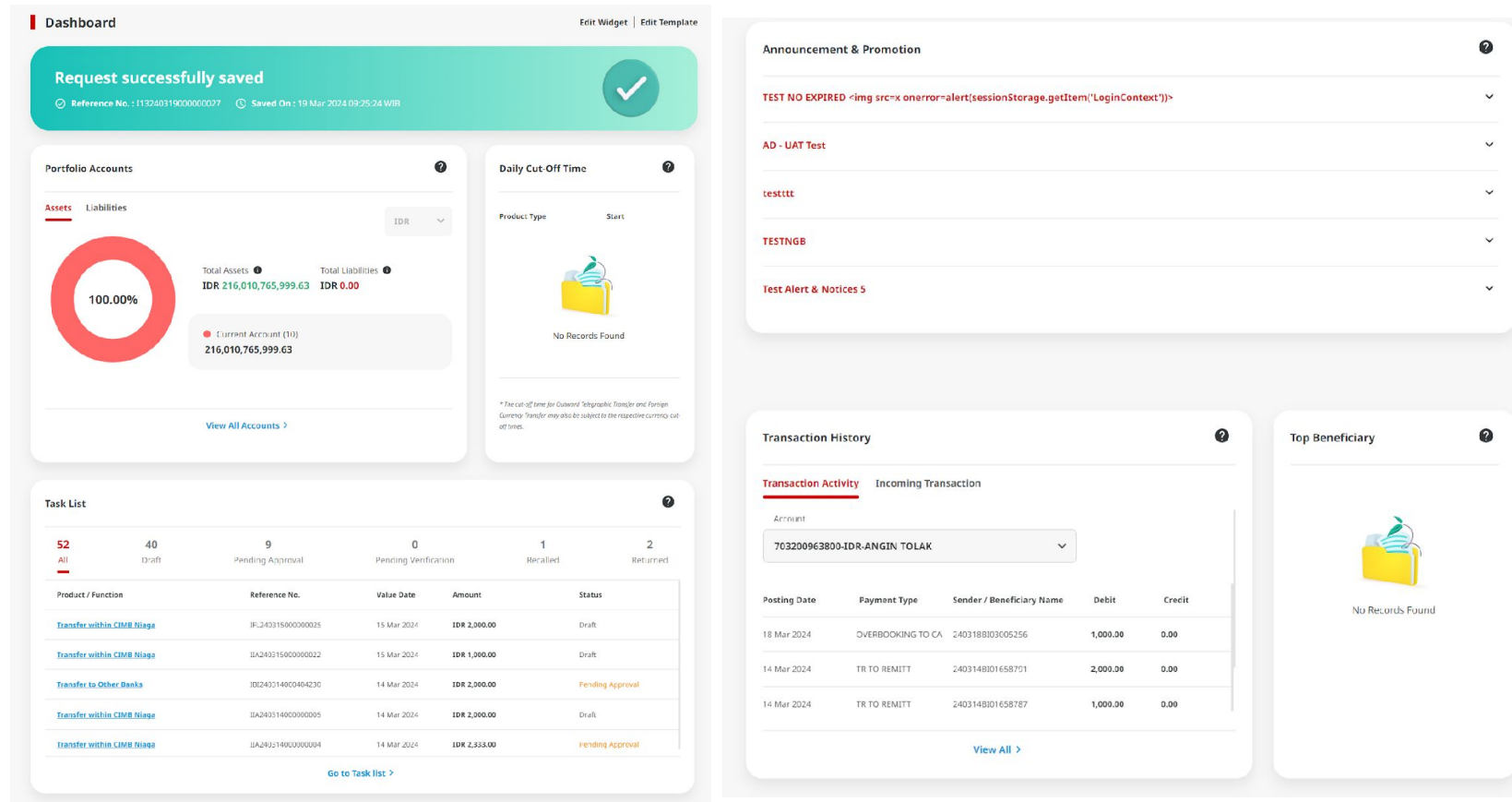
Go to Task list >



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**

