

OCTO Biz

Pay & Transfer Payment Advice

TUTORIALOCTOBIZ2024

KEJAR MIMPI

*Aksi dan
Kolaborasi*





Pay & Transfer

Payment Advice

Payment Advice - This function is to allow customers to send payment advice to the beneficiary while creating new transaction within system

- Add on structured advice based on payment advice layout maintenance

PAGE
04 Simple
Advice

PAGE
22 Structured
Advice



Pay & Transfer

Payment Advice

Simple Advice in Transactions module

Structured Advice in Transactions module



Pay & Transfer

Payment Advice

Simple Advice in Transactions module

Structured Advice in Transactions module

STEP

01

MAKER



1

User Maker Login using User & Company ID

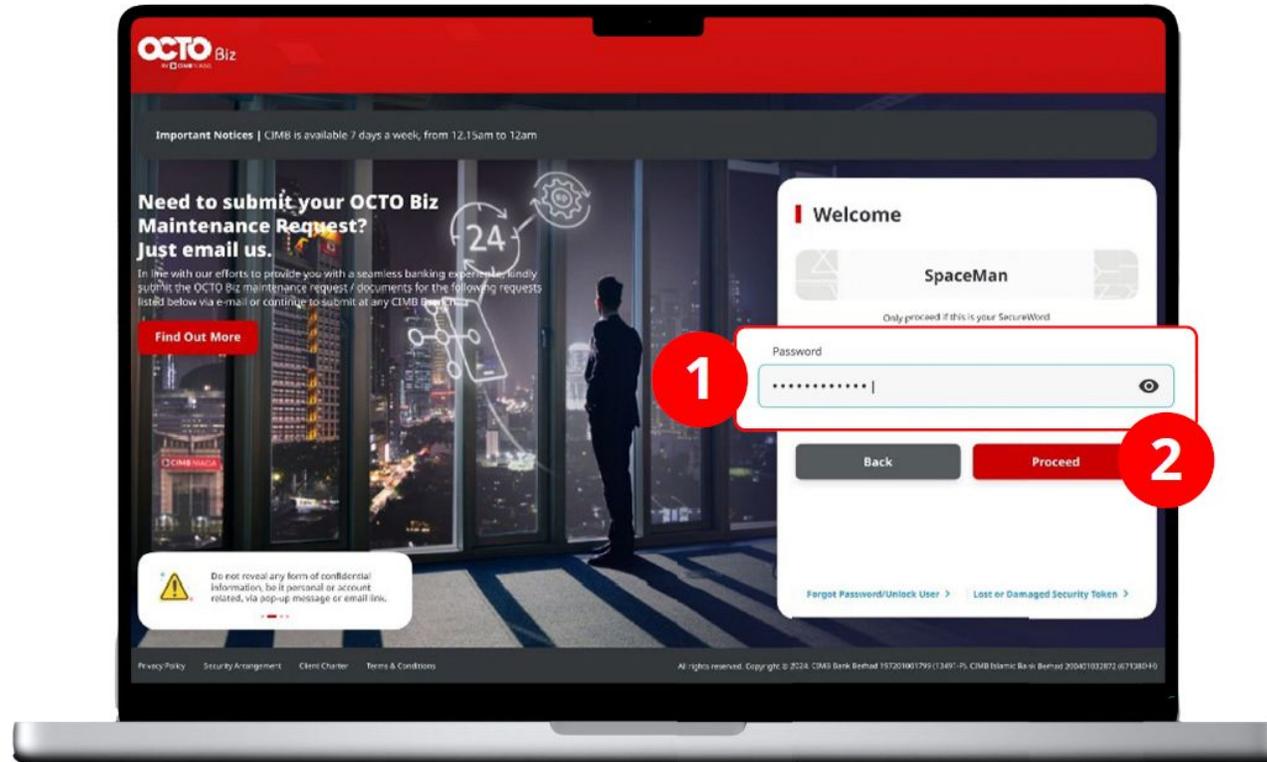
2

Click Next

STEP

02

MAKER



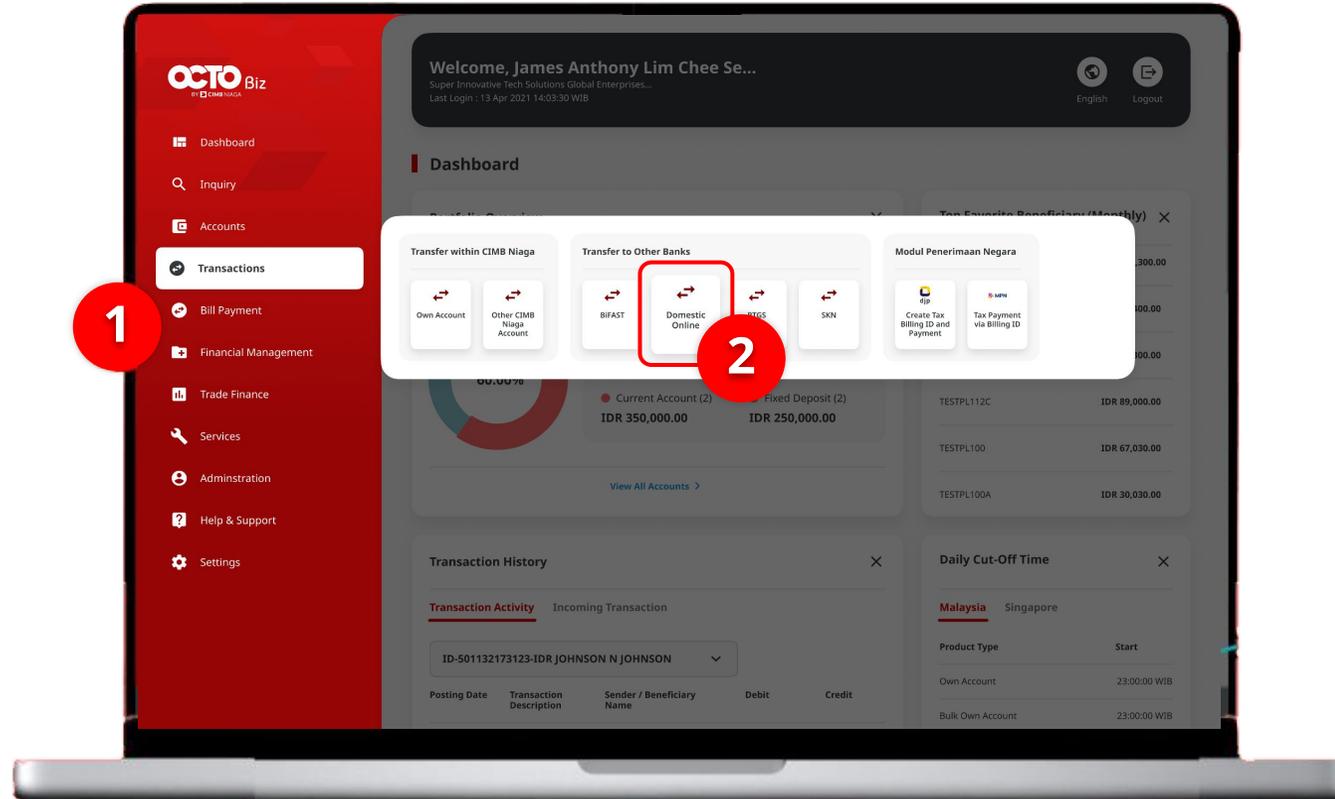
1 Fill the **Password**

2 Click **Proceed**

STEP

03

MAKER



System will navigate to
Dashboard Page,

- 1 Navigate to Side Menu,
Click Transaction
- 2 Choose **Payment Advice**

The screenshot displays the OCTO Biz web interface. The left sidebar contains navigation options: Dashboard, Inquiry, Accounts, Transactions (highlighted), Bill Payment, Financial Management, Trade Finance, Services, Administration, Help & Support, and Settings. The main content area shows the 'Domestic Online' transaction form. A red box labeled '1' highlights the 'From Account' dropdown menu. Below it, a modal window titled 'Your Account Listing' is shown, with a red box labeled '2' highlighting the first account in the list: INTBM WAHYU (Account No. 703057606100, Balance IDR 1,883,242,330,088.76). At the bottom of the modal, a red box labeled '3' highlights the 'Next' button.

Account Name	Account No.	Account Balance
INTBM WAHYU	703057606100	IDR 1,883,242,330,088.76
ANGIN TOLAK	800152518600	IDR 39,939,720,962.35
ANGIN TOLAK	800152538600	IDR 676,799,649.85
ANGIN TOLAK	800152541700	IDR 1,128,901,523.04
ANGIN TOLAK	800152525600	IDR 298,845,138.01

1 On Data Payment Entry Page, Click **From Account**

2 Choose **Source of Fund**

3 Click **Next**

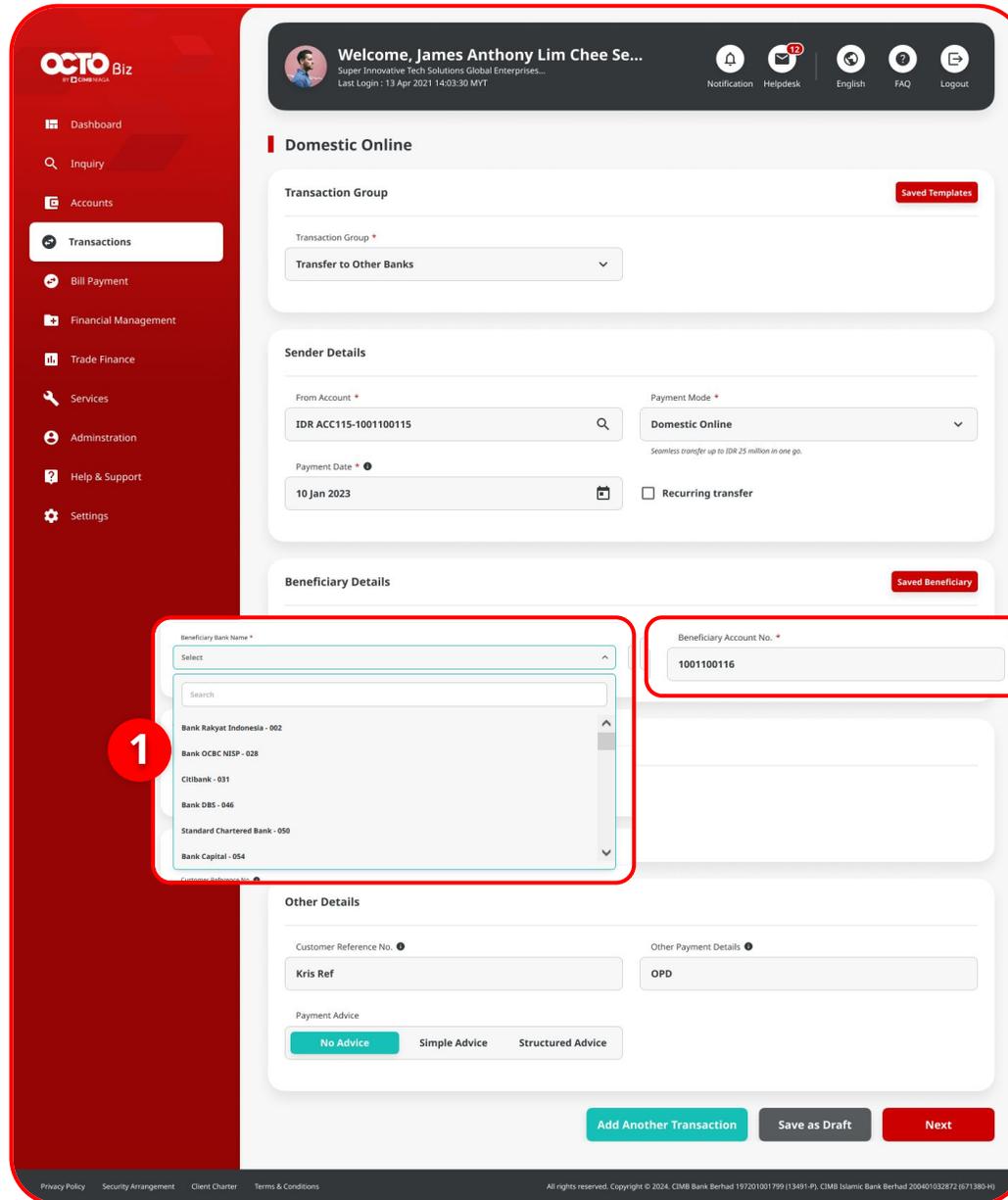
STEP

05

MAKER

The screenshot displays the OCTO Biz web interface for a Domestic Online transaction. The left sidebar contains navigation options: Dashboard, Inquiry, Accounts, Transactions (highlighted), Bill Payment, Financial Management, Trade Finance, Services, Administration, Help & Support, and Settings. The main content area is titled 'Domestic Online' and includes a 'Welcome, James Anthony Lim Chee Se...' header with user profile and navigation icons. The form is divided into several sections: 'Transaction Group' with a dropdown menu set to 'Transfer to Other Banks'; 'Sender Details' with 'From Account' set to 'IDR ACC115-1001100115' and 'Payment Mode' set to 'Domestic Online'; 'Payment Date' set to '10 Jan 2023' (highlighted with a red box and a red circle containing the number '1'); 'Beneficiary Details' with 'Beneficiary Bank Name' set to 'Bank Central Asia - BRINIDJXXX' and 'Beneficiary Account No.' set to '1001100116'; 'Transaction Details' with 'Transaction Currency' set to 'IDR - INDONESIA...' and 'Amount' set to '500,000.00'; and 'Other Details' with 'Customer Reference No.' set to 'Kris Ref' and 'Other Payment Details' set to 'OPD'. At the bottom, there are buttons for 'Add Another Transaction', 'Save as Draft', and 'Next'. The footer contains links for Privacy Policy, Security Arrangement, Client Charter, and Terms & Conditions, along with copyright information for 2024.

1 Choose Payment Date



- 1 Choose **Beneficiary Account Bank Name**
- 2 Input the **Beneficiary Account No**

Welcome, James Anthony Lim Chee Se...
Super Innovative Tech Solutions Global Enterprises...
Last Login: 13 Apr 2021 14:03:30 MFT

Notification Helpdesk English FAQ Logout

Domestic Online

Transaction Group Saved Templates

Transaction Group *
Transfer to Other Banks

Sender Details

From Account *
IDR ACC115-1001100115

Payment Mode *
Domestic Online
Seamless transfer up to IDR 25 million in one go.

Payment Date *
10 Jan 2023

Recurring transfer

Beneficiary Details

Beneficiary Bank Name *
Bank Central Asia - BRINIDJAXXX

Beneficiary Account No. *
1001100116

Transaction Details

Transaction Currency	Amount *
IDR - INDONESIA...	500,000.00

Other Details

Customer Reference No. *
Kris Ref

Other Payment Details *
OPD

Payment Advice
 No Advice Simple Advice Structured Advice

[Add Another Transaction](#) [Save as Draft](#) [Next](#)

Privacy Policy Security Arrangement Client Charter Terms & Conditions All rights reserved. Copyright © 2024. CIMB Bank Berhad 197201001799 (13491-P), CIMB Islamic Bank Berhad 200401032872 (671380-0)

1 Input Transfer Amount

STEP

08

MAKER

Domestic Online Saved Templates

Transaction Group Transfer to Other Banks

Transaction Group *

From Account * Payment Mode *

Payment Date * Recurring transfer

Beneficiary Details Saved Beneficiary

Beneficiary Bank Name * Beneficiary Account No. *

Transaction Details

Transaction Currency Amount *

Other Details

Customer Reference No. * Other Payment Details *

Payment Advice Simple Advice Structured Advice

Beneficiary Email Address *

Message to Beneficiary

Payment Advice

OCTO Biz
BY CIMB NIAGA

Please be advised that the following transfer has been made to your account.

Your Account	Amount	Payment Mode
IDR JLUPJOLY JPPYON UJJOJ YOSZOWLJ - 80003803200	IDR 444.00	Own Account
Customer Reference No.	Other Payment Details	Payment Date
Nuria01	Nuria Testing	20 Nov 2023

Message to Beneficiary
PURPOSE OF THIS TESTING TO MAKE SURE THE PREVIEW PAYMENT ADVICE IS WORKING SUCCESSFULLY WITHOUT ANY ERROR

If you have any questions about this advice, please contact:

Contact Name Country Code Mobile No.

Email

Payer Details

Company Details
Subscriber Building No 559000
559000 Subscriber Name Street
SINGAPORE Subscriber Name Street 4

- 1 Click **Simple Advice** on Other Details
- 2 Input **Beneficiary Email Address**
- 3 Input **Message to Beneficiary**
- 4 Click **Preview Payment Advice**
- 5 Review the **Payer Details**

STEP

09

MAKER

Domestic Online Saved Templates

Transaction Group

Transaction Group *
Transfer to Other Banks

Sender Details

From Account *
IDR ACC115-1001100115

Payment Mode *
Domestic Online

Payment Date *
10 Jan 2023

Recurring transfer

Beneficiary Details Saved Beneficiary

Beneficiary Bank Name *
Bank Central Asia - BRINIDJAXXX

Beneficiary Account No. *
1001100116

Transaction Details

Transaction Currency
IDR - INDONESIA...

Amount *
500,000.00

Other Details

Customer Reference No. *
Kris Ref

Other Payment Details *
OPD

Payment Advice

Payment Advice
No Advice Simple Advice

Beneficiary Email Address *
NSB1@mylab.local

Message to Beneficiary
PURPOSE OF THIS TESTING TO MAKE SURE THE PREVIEW PAYMENT ADVICE IS WORKING S... Preview Payment Advice

Add Another Transaction Save as Draft Next **1**

Welcome, James Anthony Lim Chee Se...
Super Innovative Tech Solutions Global Enterprises...
Last Login : 13 Apr 2021 14:03:30 MYT

Notification Helpdesk English FAQ Logout

Domestic Online > Review Details

Transaction Group

Transaction Group
Transfer to Other Banks

Sender Details

From Account
IDR ACC115-1001100115

Payment Mode
Domestic Online

Payment Date
10 Jan 2023

Beneficiary Details

Beneficiary Bank Name
Bank Central Asia - BRINIDJAXXX

Beneficiary Account No.
1001100116

Beneficiary Name
Kristanto Haryadi

Transaction Details

Transaction Currency	Amount	Bank Charges
IDR - INDONESIA RUPIAH	500,000.00	IDR 6,500.00

Other Details

Customer Reference No.
Kris Ref

Other Payment Details
OPD

Back Print Submit **2**

System will navigate back to
Create Transaction Page

1 Click **Next**

2 Review the Transaction,
Click **Submit**

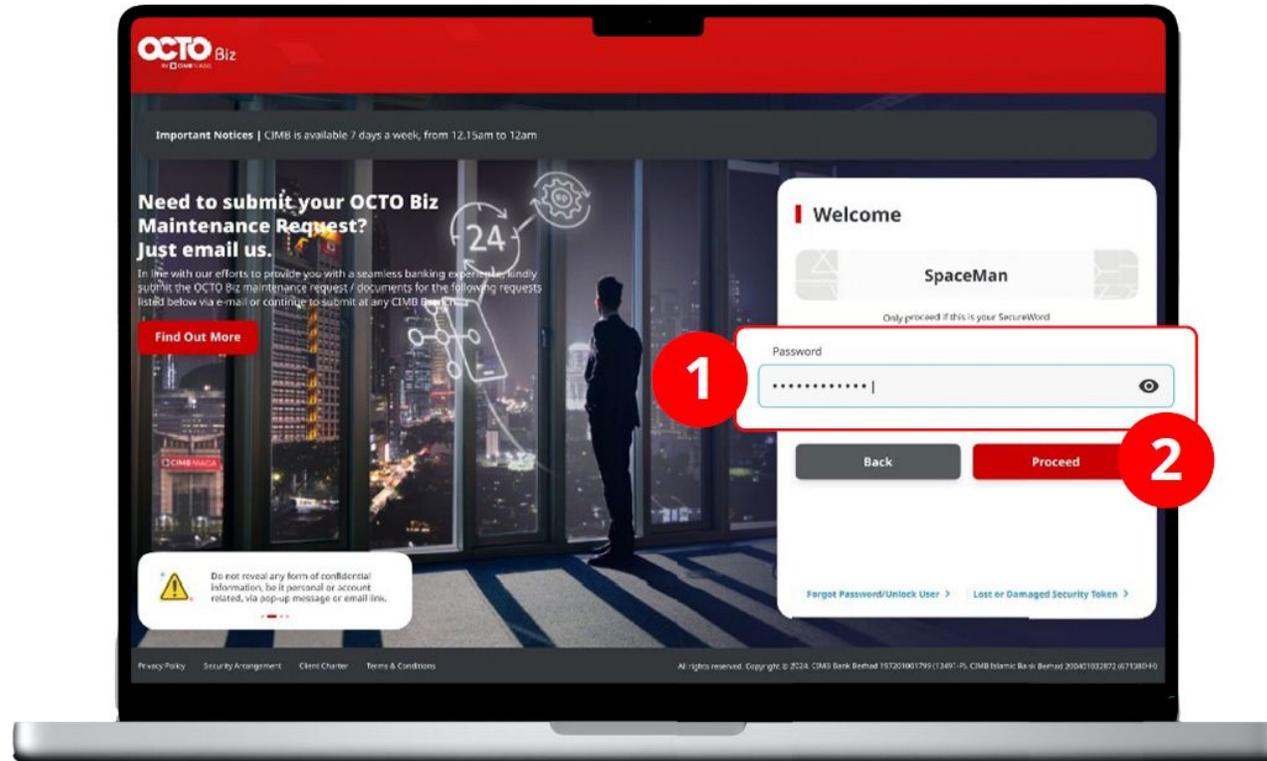
The screenshot displays the OCTO Biz web interface. The left sidebar contains navigation options: Dashboard, Inquiry, Accounts, Transactions (highlighted), Bill Payment, Financial Management, Trade Finance, Services, Administration, Help & Support, and Settings. The main content area shows a 'Domestic Online > Acknowledgement' page. A green banner at the top states 'Request successfully submitted' with a checkmark icon. Below this, a reference number 'NF2304060000000001' and approval date '28 Sep 2022 10:52:20 WIB' are shown. The page is divided into several sections: 'Transaction Group' (Transfer to Other Banks), 'Sender Details' (From Account: IDR ACC115-1001100115, Payment Mode: Domestic Online, Payment Date: 10 Jan 2023), 'Beneficiary Details' (Beneficiary Bank Name: Bank Central Asia - BRINIDJAXXX, Beneficiary Account No.: 1001100116, Beneficiary Name: Kristanto Haryadi), 'Transaction Details' (Transaction Currency: IDR - INDONESIAN RUPIAH, Amount: 500,000.00, Bank Charges: IDR 6,500.00), and 'Other Details' (Customer Reference No.: Kris Ref, Other Payment Details: OPD). At the bottom, there are four buttons: Print, Save As Template, Save As Beneficiary, and Make Another Transaction. The footer contains links for Privacy Policy, Security Arrangement, Client Charter, and Terms & Conditions, along with copyright information for CMB Bank Berhad and CIMB Islamic Bank Berhad.

If Successfully submitted,
system will navigate to
Acknowledgement page

STEP

11

APPROVER

Login as **Approver**

- 1 Fill the **Password**
- 2 Click **Proceed**

STEP

12

APPROVER

The screenshot shows the OCTO Biz dashboard for user JAMES. The side menu on the left includes Dashboard, Task List, Inquiry, Accounts, Pay & Transfer, Services, Reporting, Administration, Help & Support, and Settings. The Task List section is active, displaying 33 results. The table below shows transactions with columns for Transaction Group, Amount, Beneficiary Bank, Beneficiary Name, Account Nickname, Status, and Action. The first transaction, 'Transfer to Other Banks', is highlighted with a red box and a red circle with the number 2.

Transaction Group	Amount	Beneficiary Bank	Beneficiary Name	Account Nickname	Status	Action
Transfer to Other Banks	R 12,345.00	Bank Bumi Arta	BUMI ARTA TESTING NSICC	ANGIN TOLAK	Pending Approval	Return Reject Approve
Transfer to Other Banks	R 30,000.00	-	-	ANGIN TOLAK	Pending Approval	Return Reject Approve
Manage Template	IDR 2,111,109.00	-	-	ANGIN TOLAK	Pending Approval	Return Reject Approve
Manage Template	IDR 959,595.00	-	-	ANGIN TOLAK	Pending Approval	Return Reject Approve

1

Navigate to side menu,
Click Task List

2

Click **Transaction hyperlink** that needed to Approve

STEP

13

APPROVER

Task List > Details

Transaction Status : Pending Approval

Creation Date: 26 Jul 2024 15:12:27 WIB Reference No: ID024072600006210

Transaction Group

Transaction Group
Transfer to Other Banks

Sender Details

From Account 70320963800-IDR ANGIN TOLAK	Payment Mode Domestic Online	Payment Date 26 Jul 2024
---	---------------------------------	-----------------------------

Beneficiary Details

Beneficiary Bank Name Bank Bumi Arta - 076	Beneficiary Account No. 50490320200	Beneficiary Name BUMI ARTA TESTING NSICC
---	--	---

Transaction Details

Transaction Currency IDR - INDONESIA RUPIAH	Amount 12,345.00	Bank Charges IDR 5,000.00
--	---------------------	------------------------------

Other Details

Customer Reference No. -	Other Payment Details -	Payment Advice No Advice
-----------------------------	----------------------------	-----------------------------

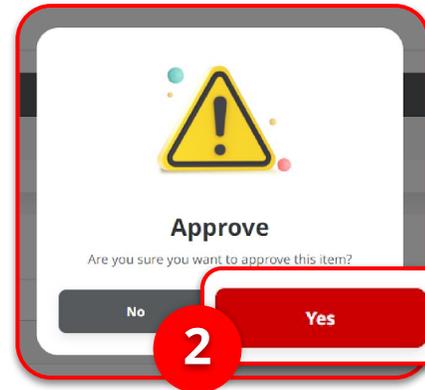
User Activities

User	Activities	Date / Time	Remark
NPMKR - Nabil Maker	Submit	26 Jul 2024 15:12:27 WIB	-

Remark

Remarks
Enter
Maximum 100 characters

Back Return Approve

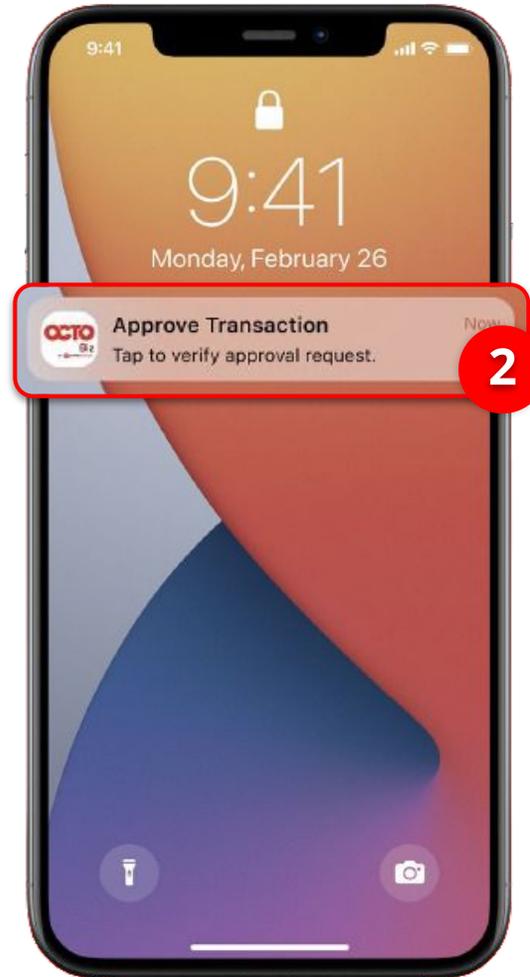
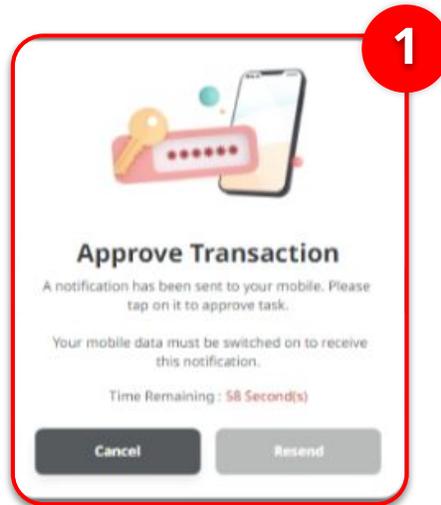
Review the **Transaction**

- 1 Click **Approve**
- 2 Click **Yes**

STEP

14

APPROVER

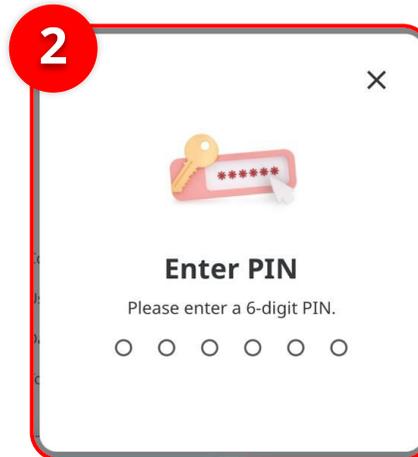
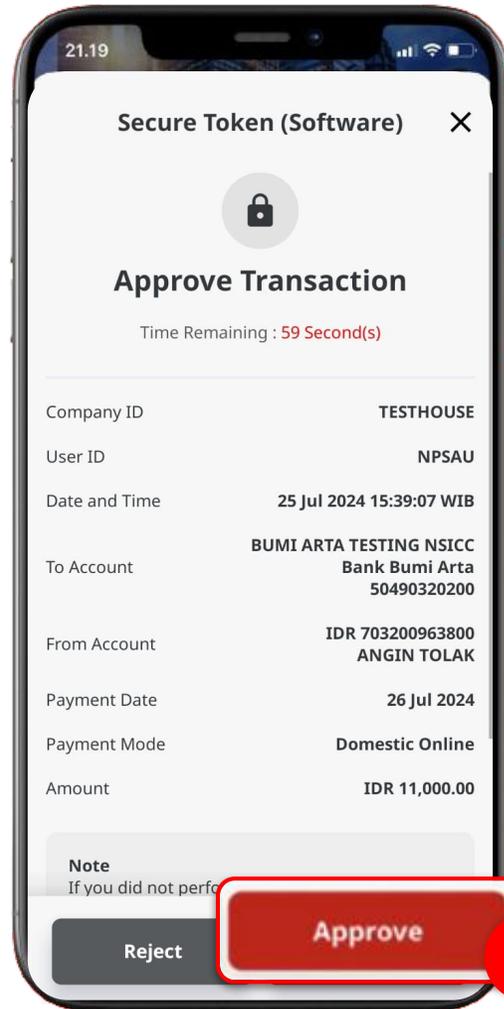


- 1 System will show the **Approve Transaction Pop-up box** on website
- 2 System also will send the mobile notification, Open the mobile device, **click the pop-up notification**

STEP

15

APPROVER



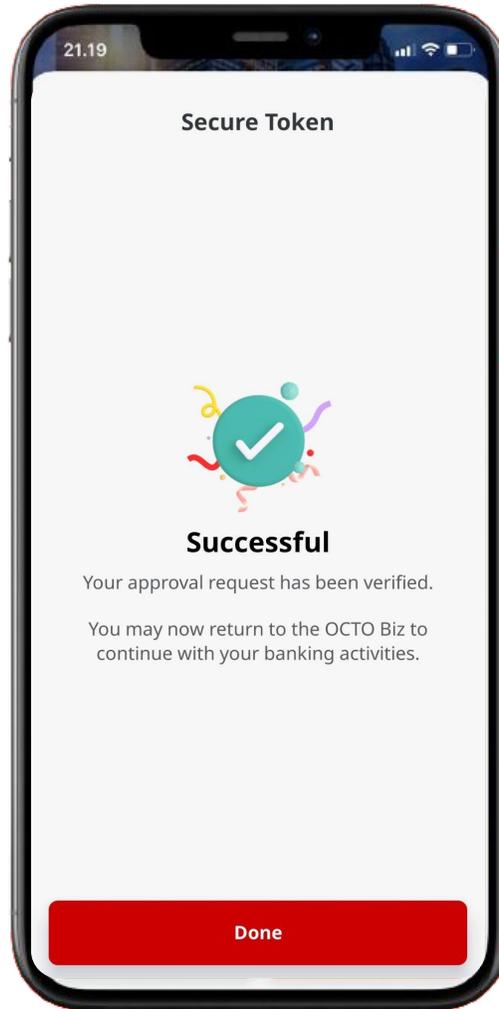
1 Click **Approve**

2 Input **6-Digit Pin**

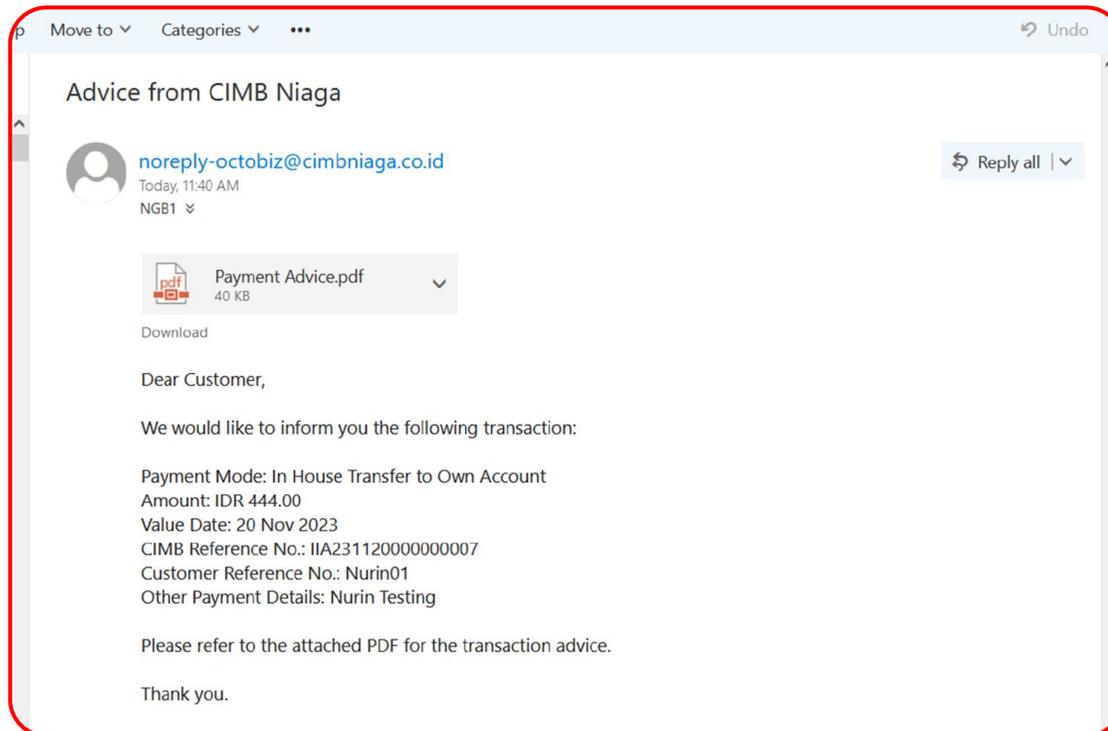
STEP

16

APPROVER



If Transaction Success,
system will navigate to
Acknowledgement page



System will send the **Payment Advice and PDF documents** on the Email that already input on the system



Pay & Transfer

Payment Advice

Simple Advice in Transactions module

Structured Advice in Transactions module

STEP

01

MAKER

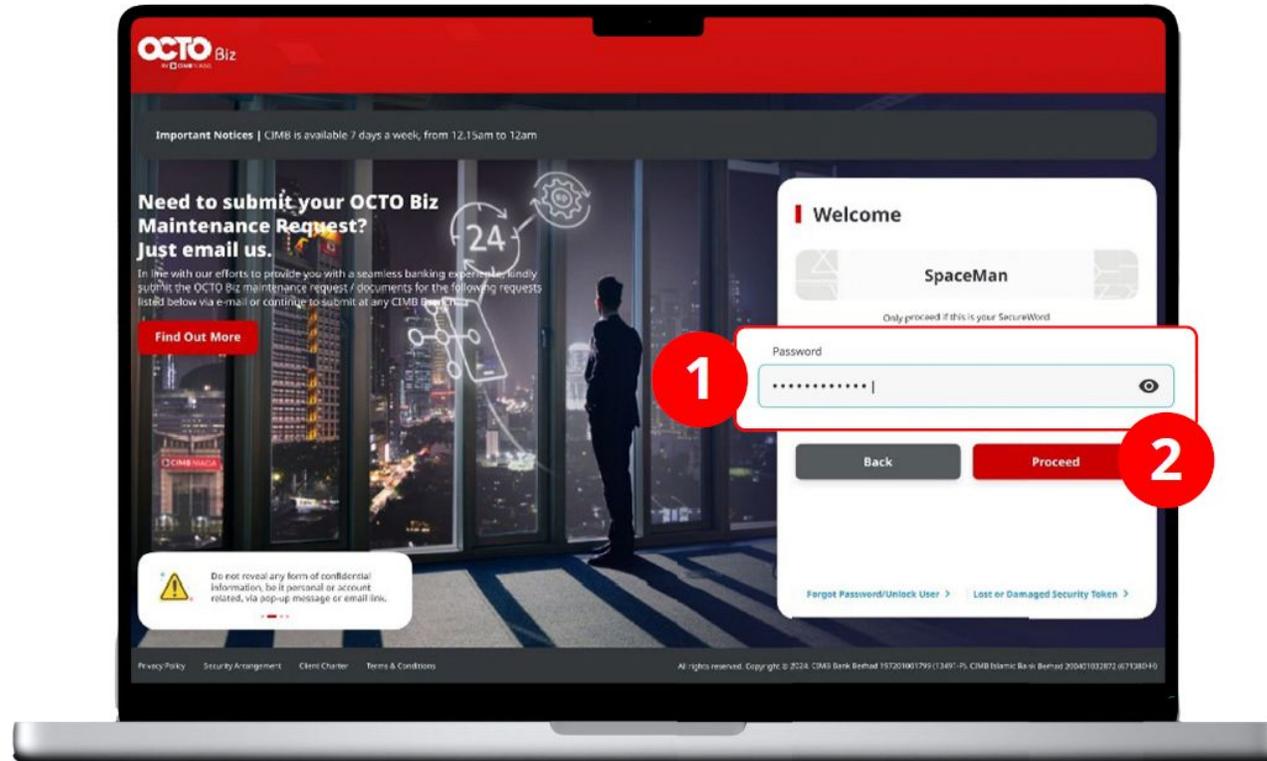


- 1 Maker Login using User & Company ID
- 2 Click Next

STEP

02

MAKER



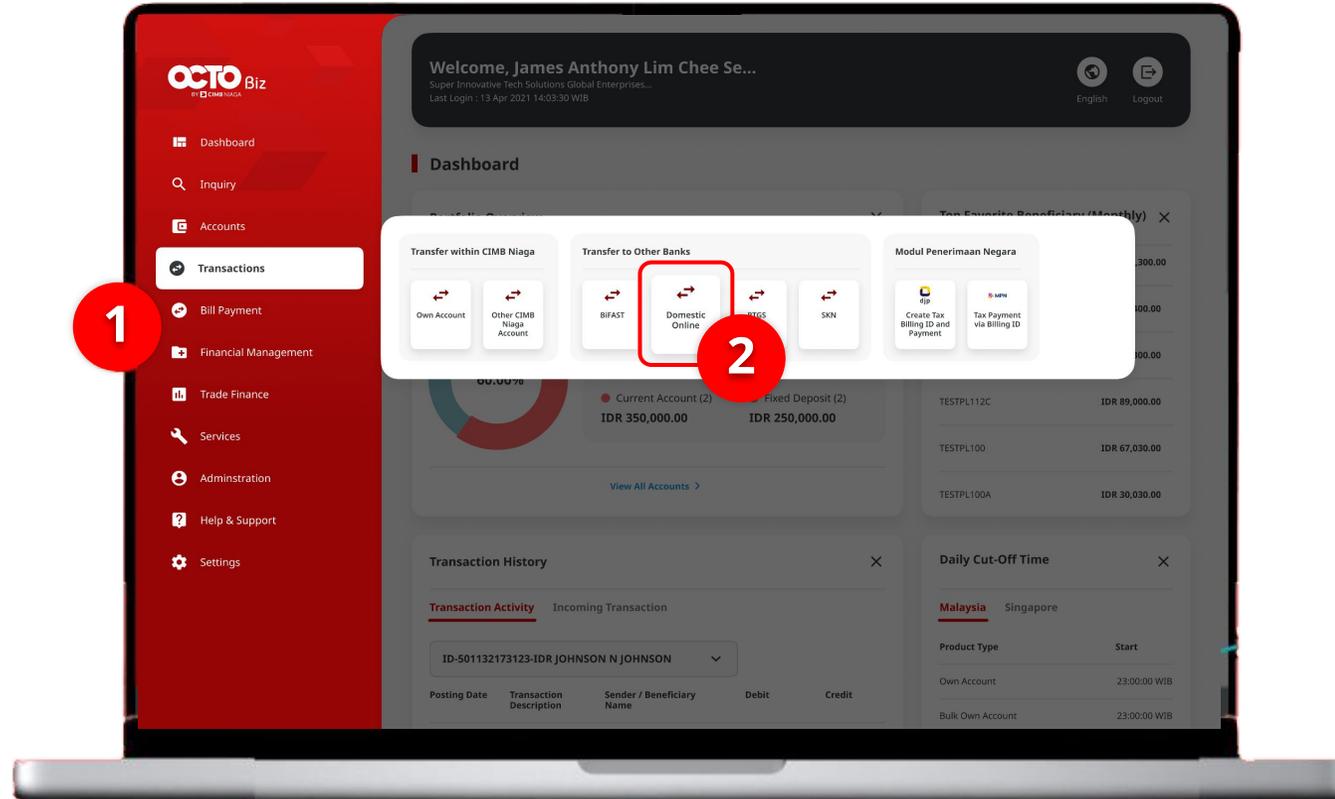
1 Fill the **Password**

2 Click **Proceed**

STEP

03

MAKER



System will navigate to
dashboard page

- 1 Navigate to side menu,
click Transaction
- 2 Click **Payment Advice**

STEP

04

MAKER

The screenshot shows the OCTO Biz interface for a user named James Anthony Lim Chee Se... The main content area is titled 'Domestic Online' and contains a 'Transaction Group' section with a dropdown menu set to 'Transfer to Other Banks'. Below this is the 'Sender Details' section, which includes a 'From Account' dropdown menu (highlighted with a red box and a red circle with the number '1'), a 'Payment Mode' dropdown menu set to 'Domestic Online', and a 'Payment Date' field set to '10 Jan 2023'. A 'Your Account Listing' modal is open, showing a table of accounts with columns for 'Account Name', 'Account No.', and 'Account Balance'. The first row is highlighted with a red box and a red circle with the number '2'. The 'Next' button in the modal is highlighted with a red box and a red circle with the number '3'. The sidebar menu includes options like Dashboard, Inquiry, Accounts, Transactions, Bill Payment, Financial Management, Trade Finance, Services, Administration, Help & Support, and Settings.

1 On Data Payment Entry page, click **From Account**

2 Choose **Source of Funds**

3 Click **Next**

STEP

05

MAKER

The screenshot shows the OCTO Biz web interface for Domestic Online transactions. The interface includes a sidebar with navigation options like Dashboard, Inquiry, Accounts, Transactions, Bill Payment, Financial Management, Trade Finance, Services, Administration, Help & Support, and Settings. The main content area is titled 'Domestic Online' and contains several sections: 'Transaction Group' with a dropdown menu set to 'Transfer to Other Banks'; 'Sender Details' with fields for 'From Account' (IDR ACC115-1001100115) and 'Payment Mode' (Domestic Online); 'Payment Date' (10 Jan 2023) which is highlighted with a red circle and the number 1; 'Beneficiary Details' with fields for 'Beneficiary Bank Name' (Bank Central Asia - BRINIDJAXXX) and 'Beneficiary Account No.' (1001100116); 'Transaction Details' with fields for 'Transaction Currency' (IDR - INDONESIA...) and 'Amount' (500,000.00); and 'Other Details' with fields for 'Customer Reference No.' (Kris Ref) and 'Other Payment Details' (OPD). At the bottom, there are buttons for 'Add Another Transaction', 'Save as Draft', and 'Next'. The footer contains legal notices and copyright information.

1 Choose Payment Date

STEP

06

MAKER

The screenshot displays the 'Domestic Online' transaction form in the OCTO Biz interface. The form includes the following sections:

- Transaction Group:** A dropdown menu set to 'Transfer to Other Banks'.
- Sender Details:** Fields for 'From Account' (IDR ACC115-1001100115), 'Payment Mode' (Domestic Online), and 'Payment Date' (10 Jan 2023). A checkbox for 'Recurring transfer' is present.
- Beneficiary Details:** A dropdown for 'Beneficiary bank name' (highlighted with a red circle '1') and a text field for 'Beneficiary Account No.' (1001100116, highlighted with a red circle '2').
- Other Details:** Fields for 'Customer Reference No.' (Kris Ref) and 'Other Payment Details' (OPD). Below these are buttons for 'No Advice', 'Simple Advice', and 'Structured Advice'.

At the bottom of the form are buttons for 'Add Another Transaction', 'Save as Draft', and 'Next'.

- 1 Choose **Beneficiary Account Name**
- 2 Input **Beneficiary Account No**

STEP

07

MAKER

The screenshot displays the OCTO Biz web interface for a Domestic Online transaction. The interface includes a navigation menu on the left with options like Dashboard, Inquiry, Accounts, Transactions, Bill Payment, Financial Management, Trade Finance, Services, Administration, Help & Support, and Settings. The main content area is titled 'Domestic Online' and contains several sections: 'Transaction Group' with a dropdown menu set to 'Transfer to Other Banks'; 'Sender Details' with fields for 'From Account' (IDR ACC115-1001100115), 'Payment Mode' (Domestic Online), 'Payment Date' (10 Jan 2023), and a 'Recurring transfer' checkbox; 'Beneficiary Details' with fields for 'Beneficiary Bank Name' (Bank Central Asia - BRINIDJAXXX) and 'Beneficiary Account No.' (1001100116); and 'Transaction Details' with fields for 'Transaction Currency' (IDR - INDONESL...) and 'Amount' (500,000.00). A red box highlights the 'Amount' field, and a red circle with the number '1' is placed next to it. Below the 'Transaction Details' section is the 'Other Details' section, which includes fields for 'Customer Reference No.' (Kris Ref) and 'Other Payment Details' (OPD). At the bottom of the form are three buttons: 'Add Another Transaction', 'Save as Draft', and 'Next'. The footer contains links for Privacy Policy, Security Arrangement, Client Charter, and Terms & Conditions, along with copyright information for CIMB Bank Berhad and CIMB Islamic Bank Berhad.

1 Input Transfer Amount

STEP

08

MAKER

Other Details

Customer Reference No.

Other Payment Details

Payment Advice

No Advice **Structured Advice**

3 Add Payment Advice

1

Beneficiary Email Address * **2**

Please separate out multiple email addresses by semicolon.

Please submit transaction before 3:31 PM on a business day.

Add Another Transaction **Save as Draft** **Next**

Payment Advice

OCTO Biz
BY CIMB NIAGA

Please be advised that the following transfer has been made to beneficiary account.

Beneficiary Account Kris Haryadi - 1122121212	Amount IDR 3,000,000.00	Payment Mode SKN
Customer Reference No.	Other Payment Details	Payment Date 25 Jul 2024

If you have any questions about this advice, please contact:

Contact Name Country Code Mobile No.

Email

Payer Details

Company Details
JALAN KAMPUNG
03 04 15224

Advice Details Breakdown

Advice Amount Breakdown *

<input type="text" value="Enter"/>	Invoice Date <input type="text" value="Enter"/>
Invoice Number <input type="text" value="Enter"/>	Description <input type="text" value="Enter"/>

5 Add

Advice Detailed Listing

Advice Details Breakdown	Invoice Date	Invoice Number	Description	Action
IDR 1,500,000.00	2024-07-25	Invoice001	Item001	Delete
IDR 1,500,000.00	2024-07-25	Invoice002	Item002	Delete
Total Amount : IDR 3,000,000.00				

6

- 1 Click **Structured Advice** on Other Details
- 2 Input **Beneficiary Email Address**
- 3 Click **Add Payment Advice**
- 4 Complete the **Advice Details**
- 5 Click **Add**
- 6 Repeat the steps until the **Advice Detail** added to the List

STEP

08

MAKER

Payment Advice

OCTO Biz
BY CIMB NIAGA

Please be advised that the following transfer has been made to beneficiary account.

Beneficiary Account Kris Haryadi - 1122121212	Amount IDR 3,000,000.00	Payment Mode SKN
Customer Reference No. -	Other Payment Details -	Payment Date 25 Jul 2024

If you have any questions about this advice, please contact:

Contact Name: ZHAO KANG CASH
Country Code: +62
Mobile No.: 12345678988
Email: zhaokang1234scash@gmail.com

1

Payer Details

Company Details
JALAN KAMPUNG
03 04 15224

Advice Details Breakdown

Advice Amount Breakdown *	Invoice Date
Enter	Enter
Invoice Number	Description
Enter	Enter

Add

Advice Detailed Listing

Advice Details Breakdown	Invoice Date	Invoice Number	Description	Action
IDR 1,500,000.00	2024-07-25	Invoice001	Item001	Delete
IDR 1,500,000.00	2024-07-25	Invoice002	Item002	Delete

Total Amount : IDR 3,000,000.00

Done **3**

OPTIONAL

1

Edit Detail that needed to
change and complete

OPTIONAL

2

To **delete Advice**, Click
Delete

3

Review **advice list**, Click
Done

STEP

09

MAKER

Domestic Online Saved Templates

Transaction Group
 Transaction Group *
 Transfer to Other Banks

Sender Details

From Account *
 IDR ACC115-1001100115

Payment Mode *
 Domestic Online

Payment Date *
 10 Jan 2023

Recurring transfer

Beneficiary Details Saved Beneficiary

Beneficiary Bank Name *
 Bank Central Asia - BRINDJAXXX

Beneficiary Account No. *
 1001100116

Transaction Details

Transaction Currency
 IDR - INDONESIA RUPIAH

Amount *
 500,000.00

Other Details

Customer Reference No. *
 Enter

Other Payment Details *
 Enter

Payment Advice
 No Advice Simple Advice **Structured Advice**

Beneficiary Email Address *
 Enter

Add Payment Advice

Please submit transaction before 3:31 PM on a business day.

Add Another Transaction Save as Draft Next **1**

Welcome, James Anthony Lim Chee Se...
 Super Invoice, Tech Solutions Global Enterprises...
 Last Login: 13 Apr 2021 14:03:30 MYT

Notification Helpdesk English FAQ Logout

Domestic Online > Review Details

Transaction Group
 Transaction Group
 Transfer to Other Banks

Sender Details

From Account
 IDR ACC115-1001100115

Payment Mode
 Domestic Online

Payment Date
 10 Jan 2023

Beneficiary Details

Beneficiary Bank Name
 Bank Central Asia - BRINDJAXXX

Beneficiary Account No.
 1001100116

Beneficiary Name
 Kristanto Haryadi

Transaction Details

Transaction Currency	Amount	Bank Charges
IDR - INDONESIA RUPIAH	500,000.00	IDR 6,500.00

Other Details

Customer Reference No. *
 Other Payment Details *
 Charges Borne by *

Payment Advice

Beneficiary Email Address
 NGB10@mylab.local

Advice Details Breakdown	Invoice Date	Invoice Number	Description
IDR 1,000,000.00	2024-07-25	Invoice001	Item001
IDR 1,000,000.00	2024-07-25	Invoice002	Item002
Total Amount: IDR 3,000,000.00			

Note
 Please be aware that charges displayed are indicative and are subject to change by the Bank without prior notice. The charges displayed may differ from the ones used to execute the transaction(s). Actual debited amount can be viewed at Transaction History after the Bank has executed the transaction(s).

Back Submit **2**

System will navigate back to **Create Transaction Page**

- 1 Click **Next**
- 2 Review the Transaction, Click **Submit**

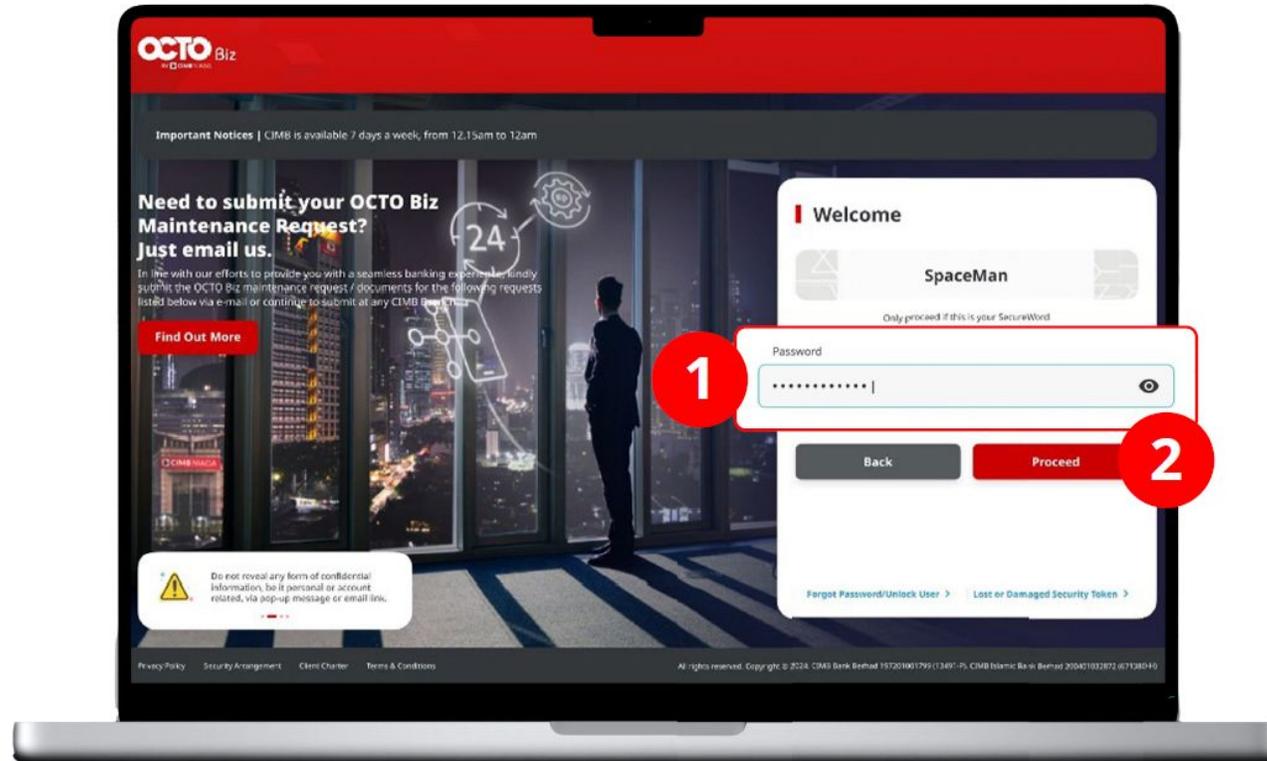
The screenshot displays the OCTO Biz web interface. On the left is a red sidebar with navigation options: Dashboard, Inquiry, Accounts, Transactions (highlighted), Bill Payment, Financial Management, Trade Finance, Services, Administration, Help & Support, and Settings. The main content area is titled 'Domestic Online > Acknowledgement'. A green banner at the top of the main area reads 'Request successfully submitted' with a checkmark icon and provides a reference number (NF2304060000000001) and approval date (28 Sep 2022 10:52:20 WIB). Below this are four sections: 'Transaction Group' (Transfer to Other Banks), 'Sender Details' (From Account: IDR ACC115-1001100115, Payment Mode: Domestic Online, Payment Date: 10 Jan 2023), 'Beneficiary Details' (Beneficiary Bank Name: Bank Central Asia - BRINIDJAXXX, Beneficiary Account No.: 1001100116, Beneficiary Name: Kristanto Haryadi), and 'Transaction Details' (Transaction Currency: IDR - INDONESIAN RUPIAH, Amount: 500,000.00, Bank Charges: IDR 6,500.00). An 'Other Details' section shows Customer Reference No. as Kris Ref and Other Payment Details as OPD. At the bottom of the main area are four buttons: Print, Save As Template, Save As Beneficiary, and Make Another Transaction. The footer contains links for Privacy Policy, Security Arrangement, Client Charter, and Terms & Conditions, along with copyright information for CMB Bank Berhad and CIMB Islamic Bank Berhad.

If Successfully submitted,
system will navigate to
Acknowledgement page

STEP

11

APPROVER

Login as **Approver**

- 1 Fill the **Password**
- 2 Click **Proceed**

STEP

12

APPROVER

The screenshot shows the OCTO Biz dashboard for user JAMES. The side menu on the left includes Dashboard, Task List, Inquiry, Accounts, Pay & Transfer, Services, Reporting, Administration, Help & Support, and Settings. The main content area displays a 'Task List' for 'Transactions' with 33 results. The table columns are Transaction Group, Amount, Beneficiary Bank, Beneficiary Name, Account Nickname, Status, and Action. The first row is highlighted with a red box and a red circle '2', showing a transaction for R 12,345.00 with a status of 'Pending Approval' and an 'Approve' button. A red circle '1' points to the 'Task List' menu item in the side navigation.

Transaction Group	Amount	Beneficiary Bank	Beneficiary Name	Account Nickname	Status	Action
Transfer to Other Banks	R 12,345.00	Bank Bumi Arta	BUMI ARTA TESTING NSICC	ANGIN TOLAK	Pending Approval	Return Reject Approve
Manage Template	IDR 30,000.00			ANGIN TOLAK	Pending Approval	Return Reject Approve
Manage Template	IDR 2,111,109.00			ANGIN TOLAK	Pending Approval	Return Reject Approve
Manage Template	IDR 959,595.00			ANGIN TOLAK	Pending Approval	Return Reject Approve

1

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

2

Click **Transaction Hyperlink** that needed
to **Approve**

STEP

13

APPROVER

Task List > Details

Transaction Status : Pending Approval

Creation Date: 26 Jul 2024 15:12:27 WIB | Reference No: ID024072600006210

Transaction Group
Transfer to Other Banks

Sender Details
From Account: 70320963800-IDR ANGIN TOLAK | Payment Mode: Domestic Online | Payment Date: 26 Jul 2024

Beneficiary Details
Beneficiary Bank Name: Bank Bumi Arta - 076 | Beneficiary Account No: 50490320200 | Beneficiary Name: BUMI ARTA TESTING NSICC

Transaction Details
Transaction Currency: IDR - INDONESIA RUPIAH | Amount: 12,345.00 | Bank Charges: IDR 5,000.00

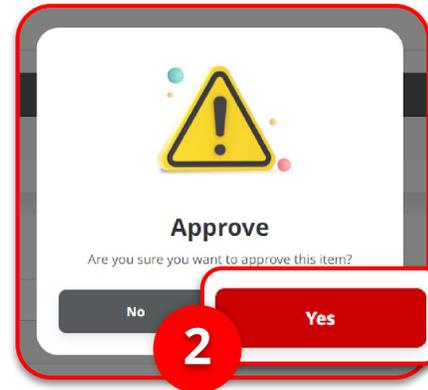
Other Details
Customer Reference No: - | Other Payment Details: - | Payment Advice: No Advice

User Activities

User	Activities	Date / Time	Remark
NPMKR - Nabil Maker	Submit	26 Jul 2024 15:12:27 WIB	-

Remark
Remarks: Enter (Maximum 100 characters)

Buttons: Back, Return, **Approve** (1)



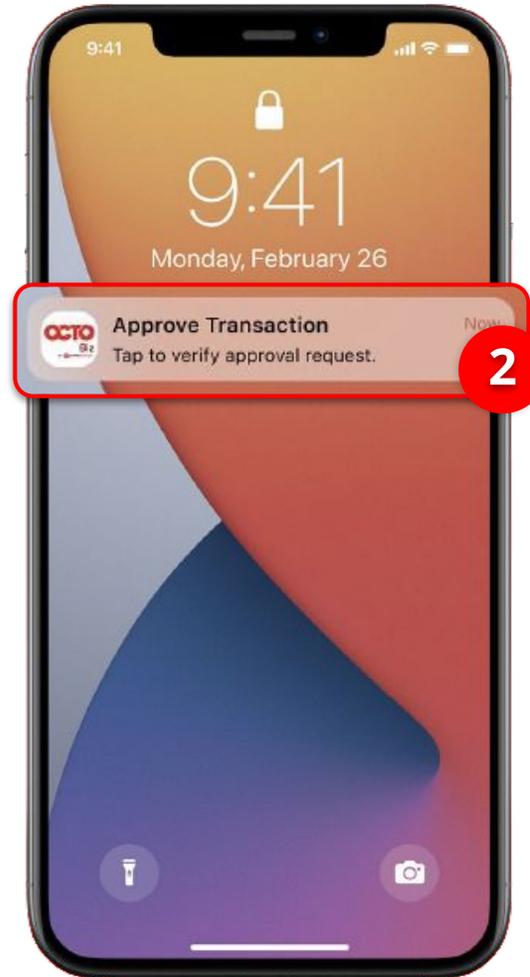
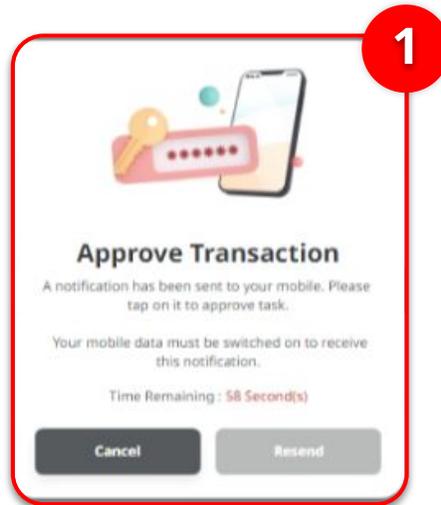
Review Transaction

- 1 Click **Approve**
- 2 Click **Yes**

STEP

14

APPROVER

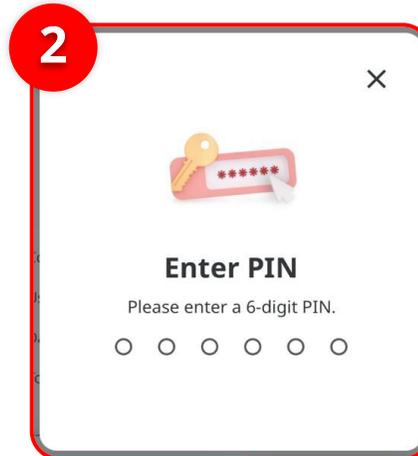
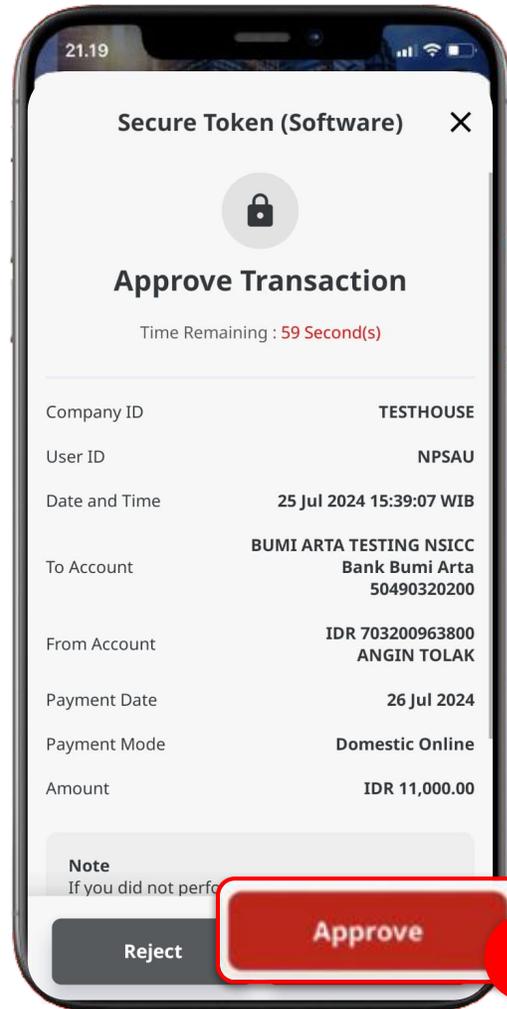


- 1 System will show the **Approve Transaction Pop-up box** on website
- 2 System also will send the mobile notification, Open the mobile device, **click the pop-up notification**

STEP

15

APPROVER



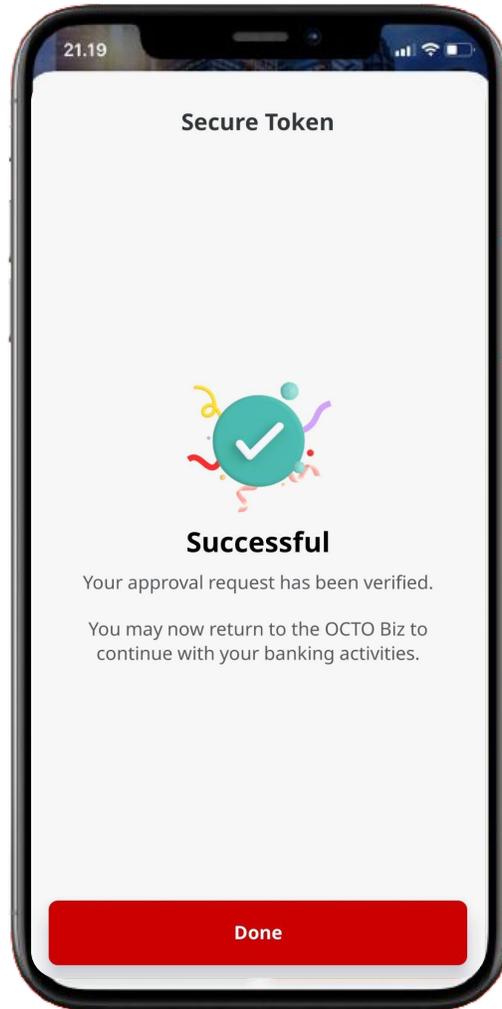
1 Click **Approve**

2 Input **6-Digit Pin**

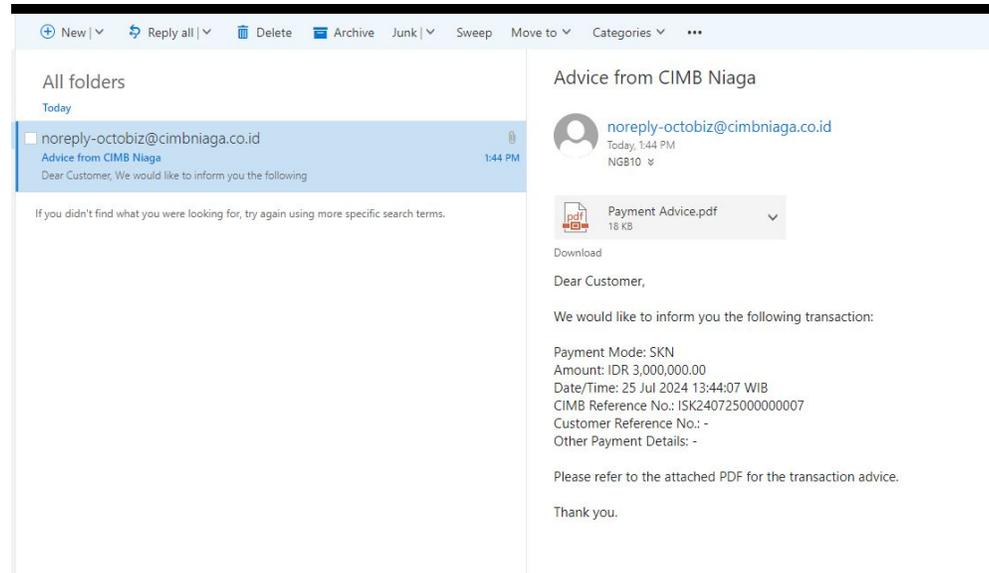
STEP

16

APPROVER



If Transaction Success,
system will navigate to
Acknowledgement page



System will send the **Payment Advice and PDF documents** on the Email that already input on the system



OCTO Biz
BY  **CIMB NIAGA**

