

OCTO Biz

How-to-get Started
**TRANSFER TO
3rd PARTY**
Mobile

TUTORIALOCTOBIZ2024

KEJAR MIMPI

*Aksi dan
Kolaborasi*





PAY & TRANSFER

TRANSFER TO 3RD PARTY

Transaction - Transfer to 3rd Party This function is the payment mode for customers to perform transfer to other CIMB Account

PAGE

03 Create
Transaction

PAGE

46 Approve
Transaction



TRANSFER TO 3RD PARTY

Create Transaction

Other CIMB Niaga Account

OCTO Pay



TRANSFER TO 3RD PARTY **Create Transaction**

Other CIMB Niaga Account

OCTO Pay

STEP

01

MAKER

Other CIMB Niaga Account | Transfer to 3rd Party

Menu : Pay & Transfer > Other CIMB Niaga Account

5



1

Click **Password Login**

2

Input the **Password**

3

Click **Proceed**

STEP

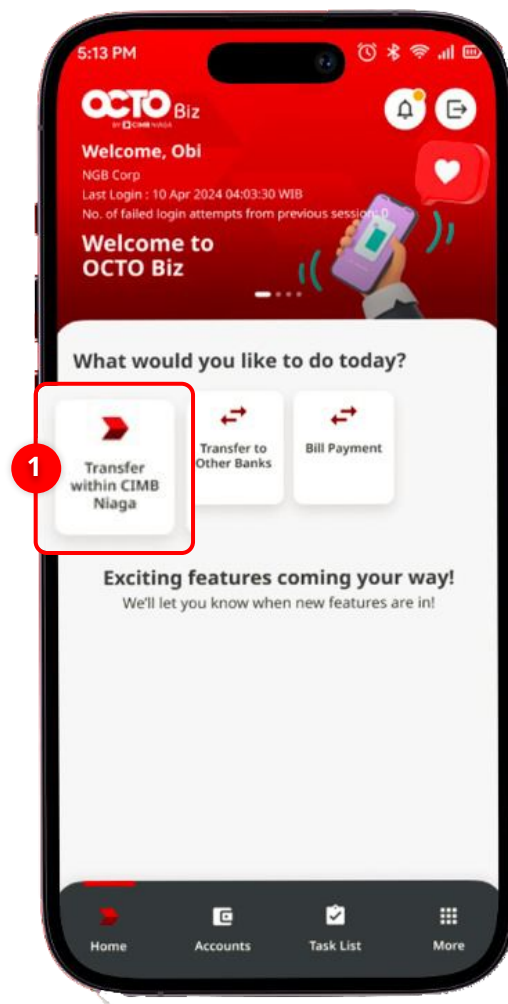
02

MAKER

Other CIMB Niaga Account | Transfer to 3rd Party

Menu : Pay & Transfer > Other CIMB Niaga Account

6



1

Click **Transfer within CIMB**

STEP

03

MAKER

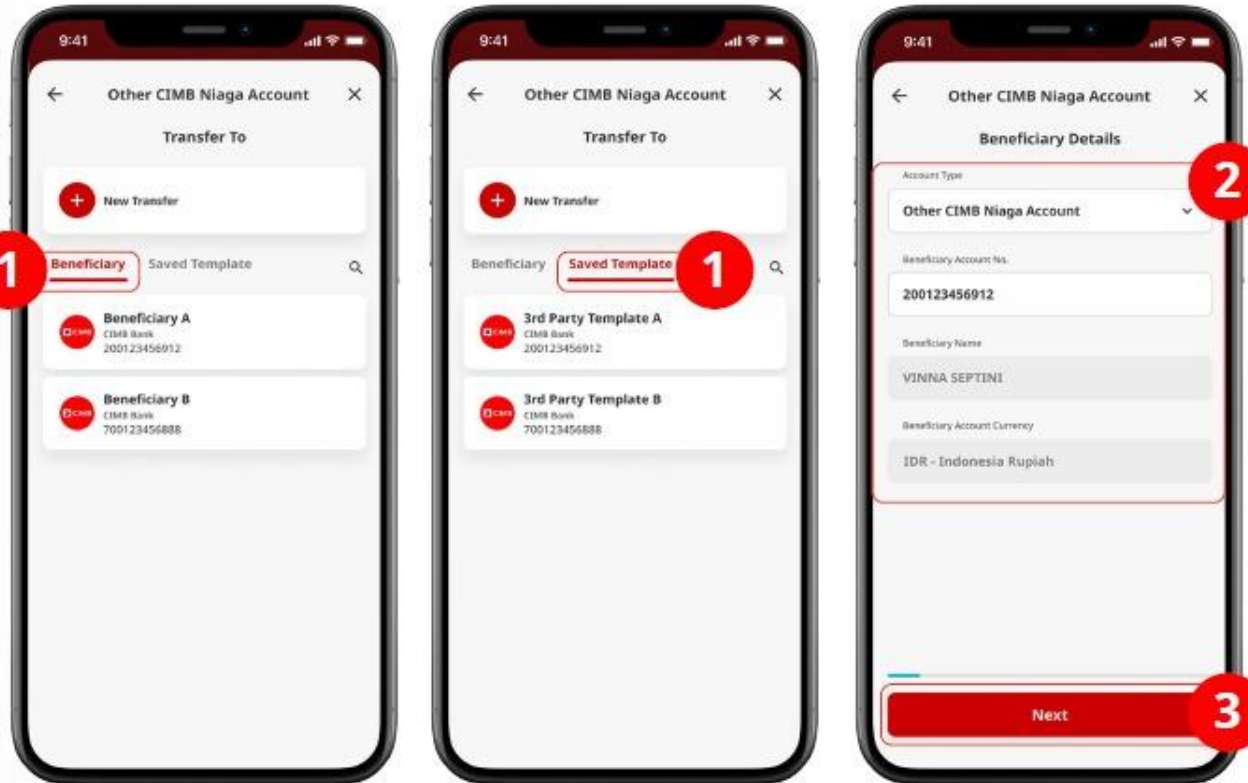
Other CIMB Niaga Account | Transfer to 3rd Party

Menu : Pay & Transfer > Other CIMB Niaga Account

7



- 1 Choose **From Account**
- 2 Choose **Payment Mode - Other CIMB Niaga Account**
- 3 Click **Next Button**

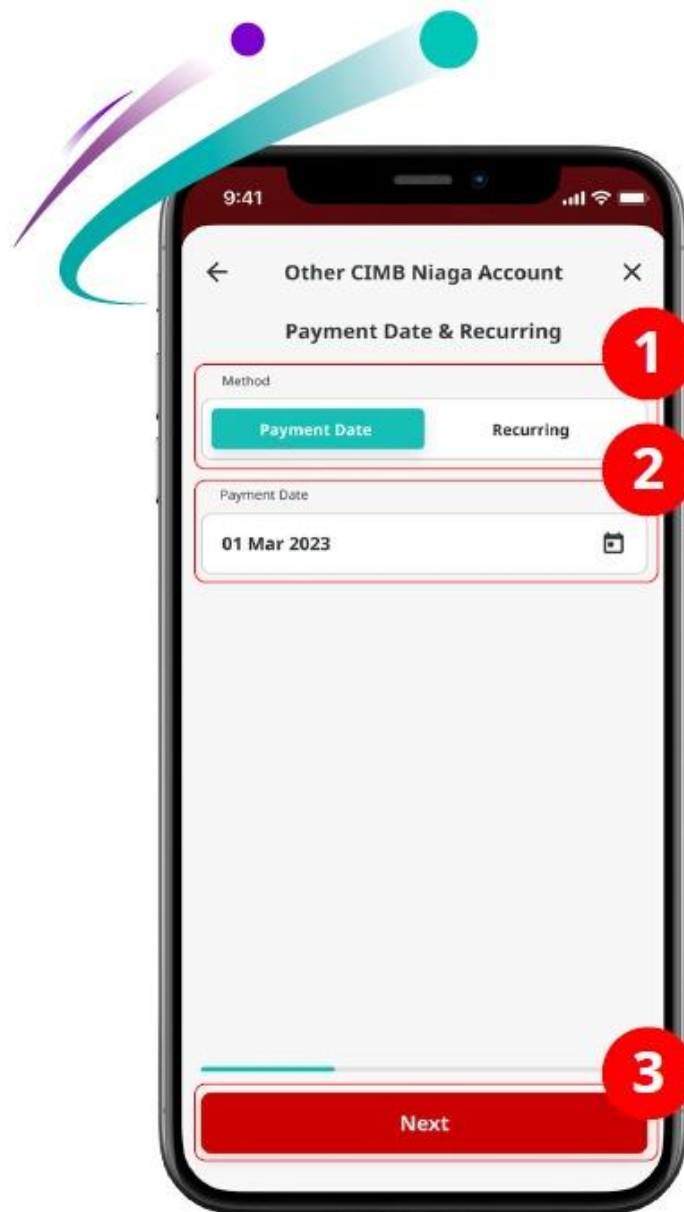


- 1 Choose **Beneficiary** or **Saved Template**
- 2 Fill in the **Details**
- 3 Click **Next**

STEP

05

MAKER



- 1 Choose **Method**
- 2 Choose **Payment Date**
- 3 Click **Next**

STEP

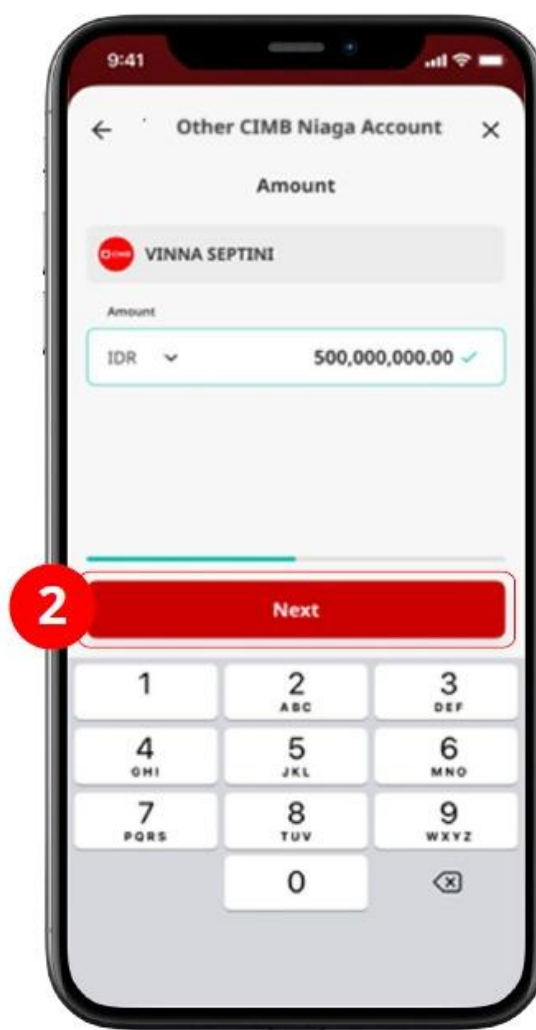
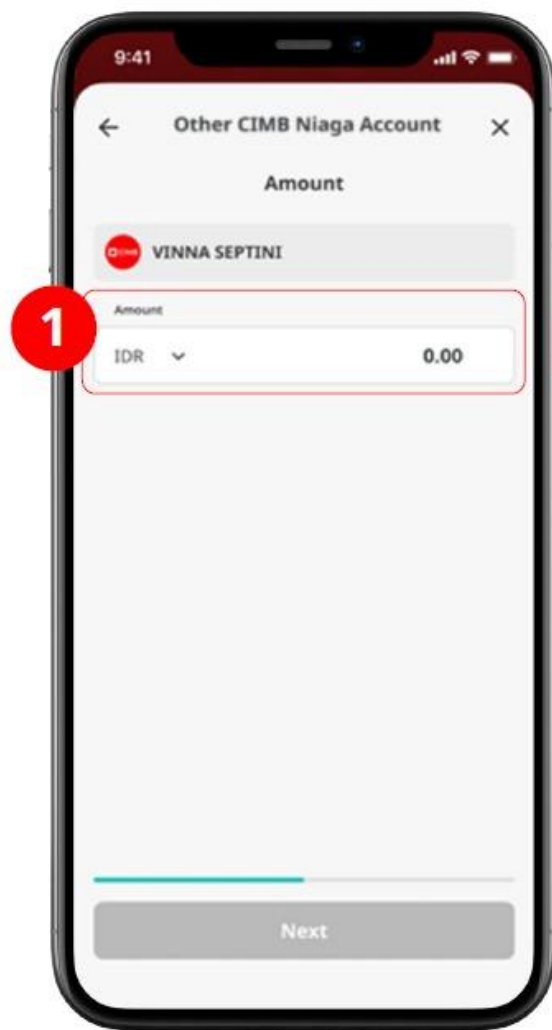
06

MAKER

Other CIMB Niaga Account | Transfer to 3rd Party

Menu : Pay & Transfer > Other CIMB Niaga Account

10



1 Choose **Currency** and Input the **Transfer Amount**

2 Click **Next**

STEP

07

MAKER

Other CIMB Niaga Account | Transfer to 3rd Party

Menu : Pay & Transfer > Other CIMB Niaga Account

11

9:41

Other CIMB Niaga Account

Other Details

1 Enter Customer Reference No.

Enter Other Payment Details

Payment Advice

No Advice Simple Advice

Note
Sender and recipient will see these notes in their bank statement.

Next

9:41

Other CIMB Niaga Account

Customer Reference No.
Other CIMB Niaga Account

Other Payment Details
July

Payment Advice

No Advice Simple Advice

Note
Sender and recipient will see these notes in their bank statement.

2 Next

1 Fill in the **Other Details**

2 Click **Next**

STEP

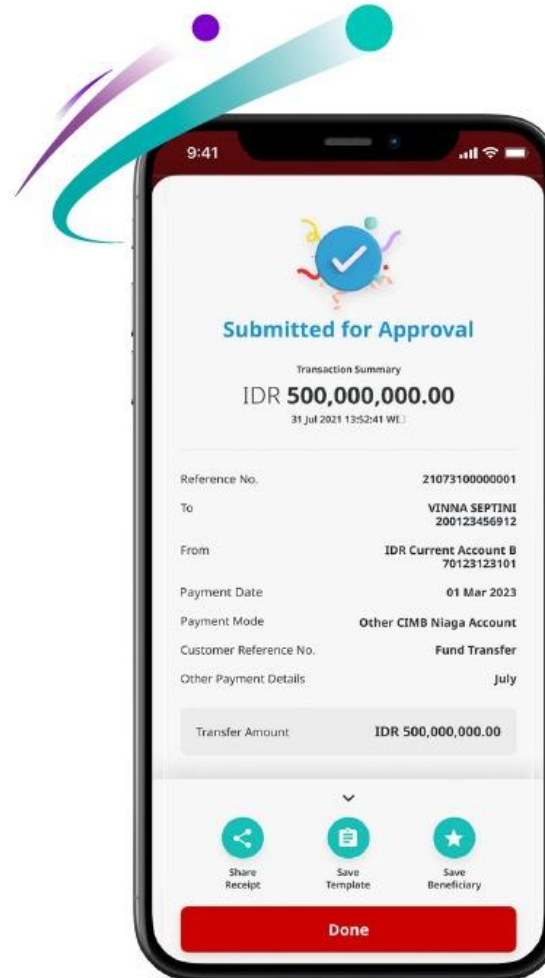
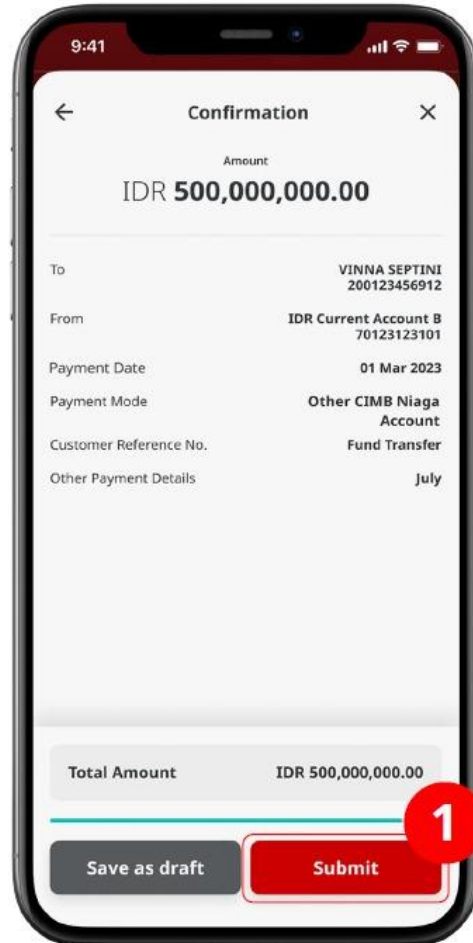
08

MAKER

Other CIMB Niaga Account | Transfer to 3rd Party

Menu : Pay & Transfer > Other CIMB Niaga Account

12



Review Transaction Details

1 Click Submit

System will navigate to
Acknowledgement Page

STEP

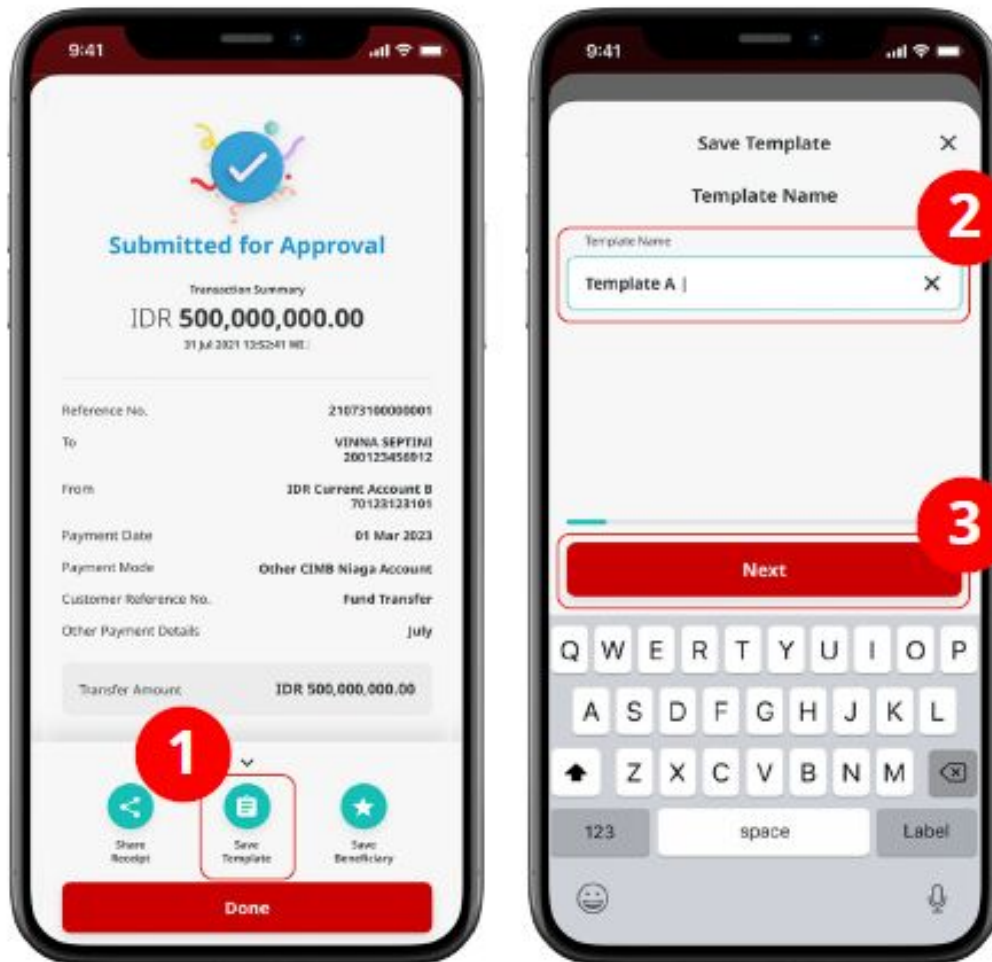
09

MAKER

Other CIMB Niaga Account | Transfer to 3rd Party

Menu : Pay & Transfer > Other CIMB Niaga Account

13



1

Click **Save as Template**

2

Input the **Template Name**

3

Click **Next**

STEP

10

MAKER

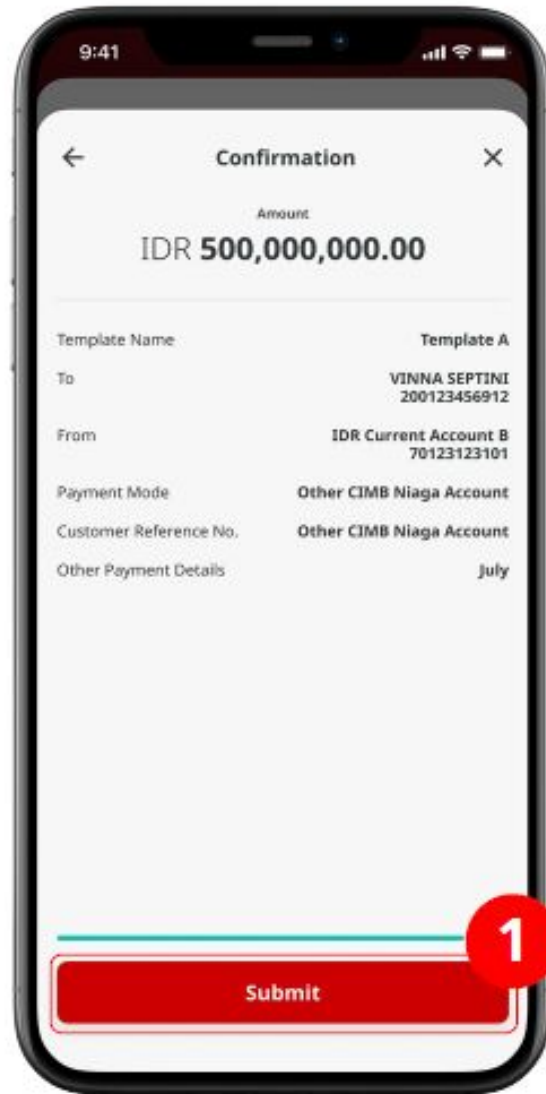
The image shows two smartphone screens side-by-side, illustrating the 'Save Template' process for a transfer. The left screen is titled 'Save Template' and shows the 'Amount' step. It has a red circle with the number 4 next to the 'Amount' input field, which contains 'IDR' and '500,000,000.00'. A red circle with the number 5 is next to the 'Next' button at the bottom. The right screen is also titled 'Save Template' and shows the 'Other Details' step. It has a red circle with the number 6 next to the 'Other CIMB Niaga Account' input field, which contains 'Other CIMB Niaga Account'. A red circle with the number 7 is next to the 'Next' button at the bottom. The 'Other Details' screen also shows a 'Customer Reference No.' field, an 'Other Payment Details' field with 'July' entered, and a 'Payment Advice' section with 'No Advice' and 'Simple Advice' buttons. A 'Note' at the bottom states: 'Sender and recipient will see these notes in their bank statement.'

- 4 Input the **Amount**
- 5 Click **Next**
- 6 Fill in the **Other Details**
- 7 Click **Next**

STEP

11

MAKER



Other CIMB Niaga Account | Transfer to 3rd Party

Menu : Pay & Transfer > Other CIMB Niaga Account

15

Review Details

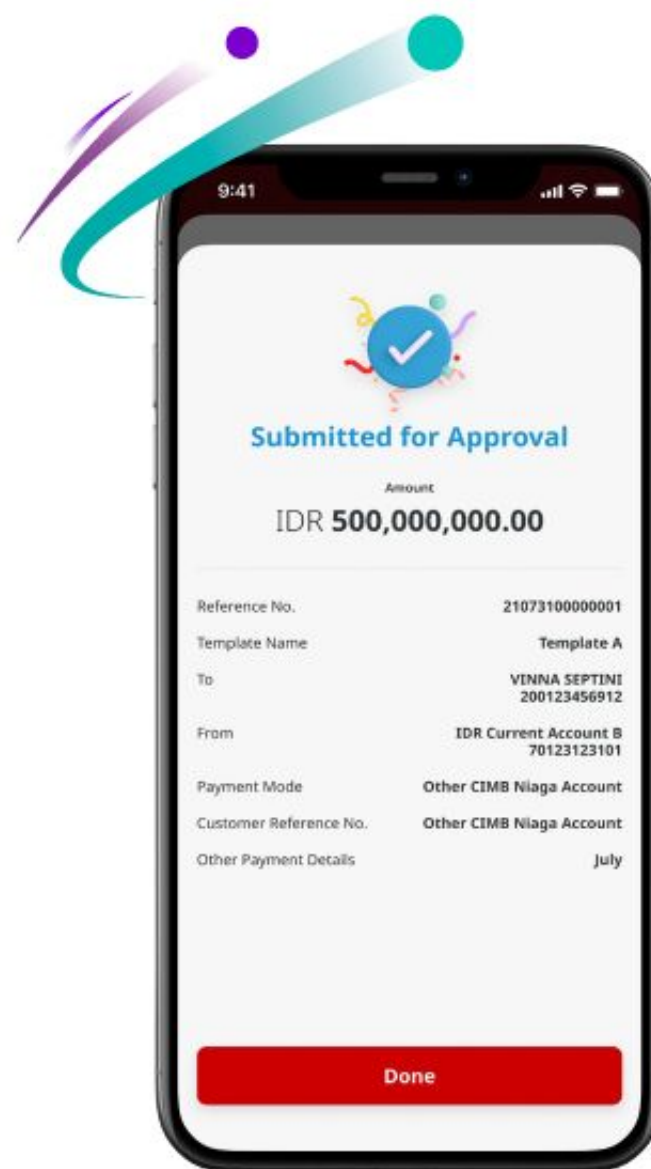
1

Click **Submit**

STEP

12

MAKER



If Transaction is Success,
system will show the
Acknowledgement page

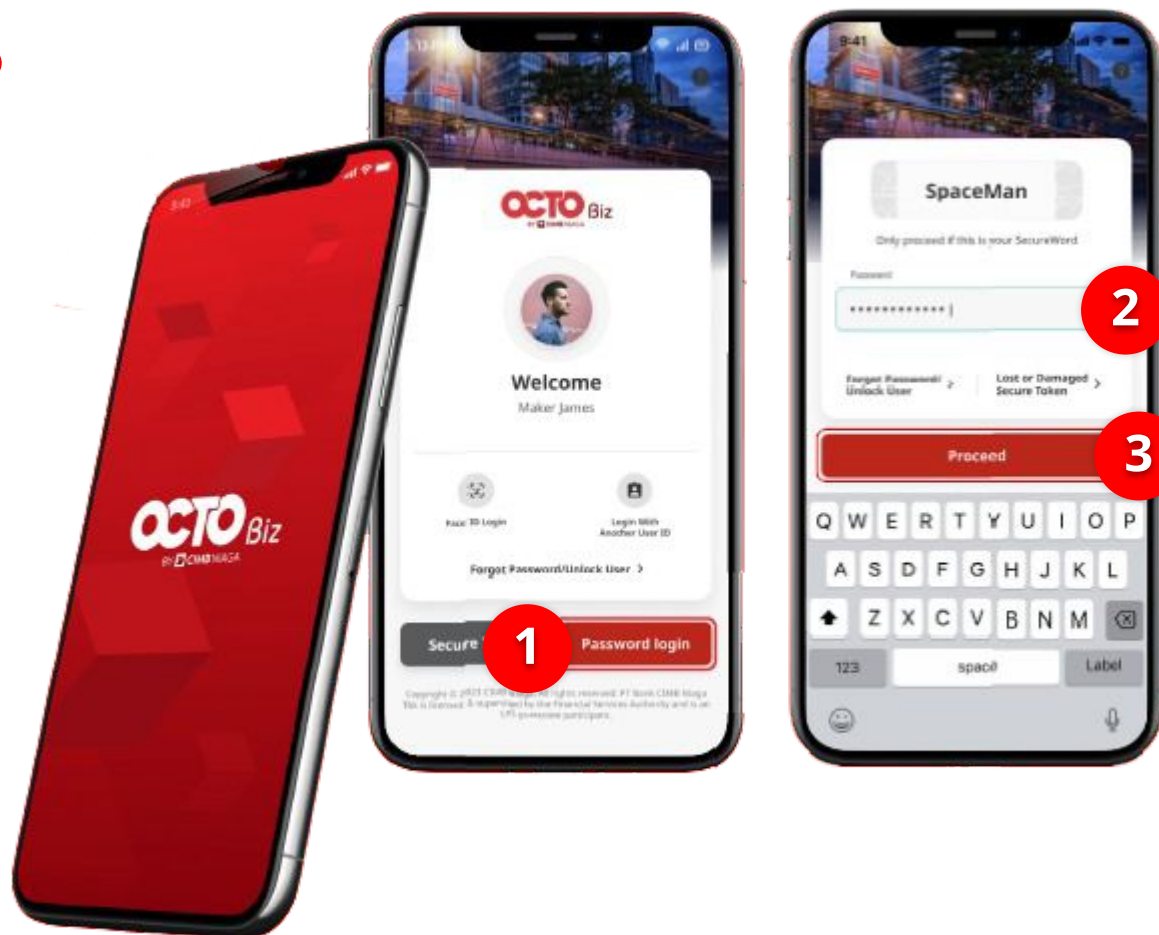


TRANSFER TO 3RD PARTY

Create Transaction

Other CIMB Niaga Account

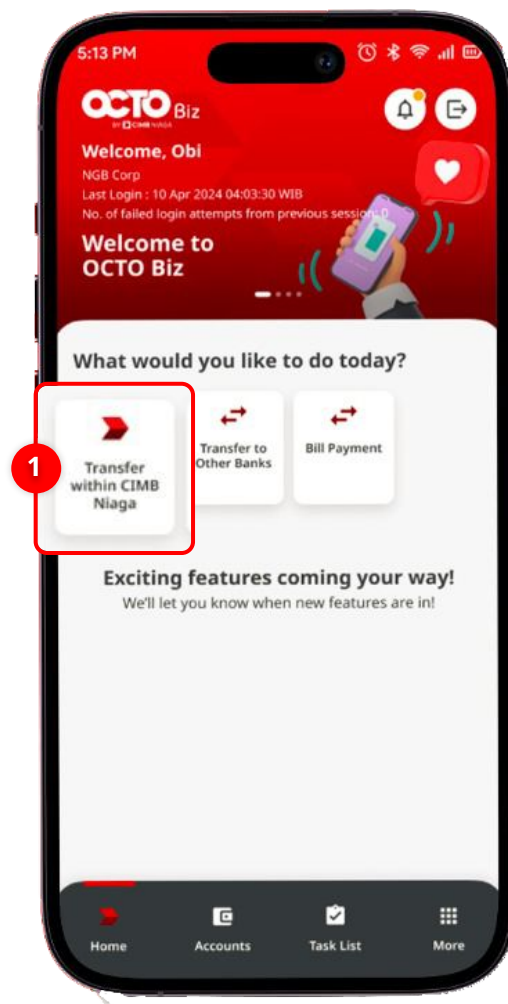
OCTO Pay



1 Click **Password Login**

2 Input the **Password**

3 Click **Proceed**



1

Click **Transfer within CIMB**

STEP

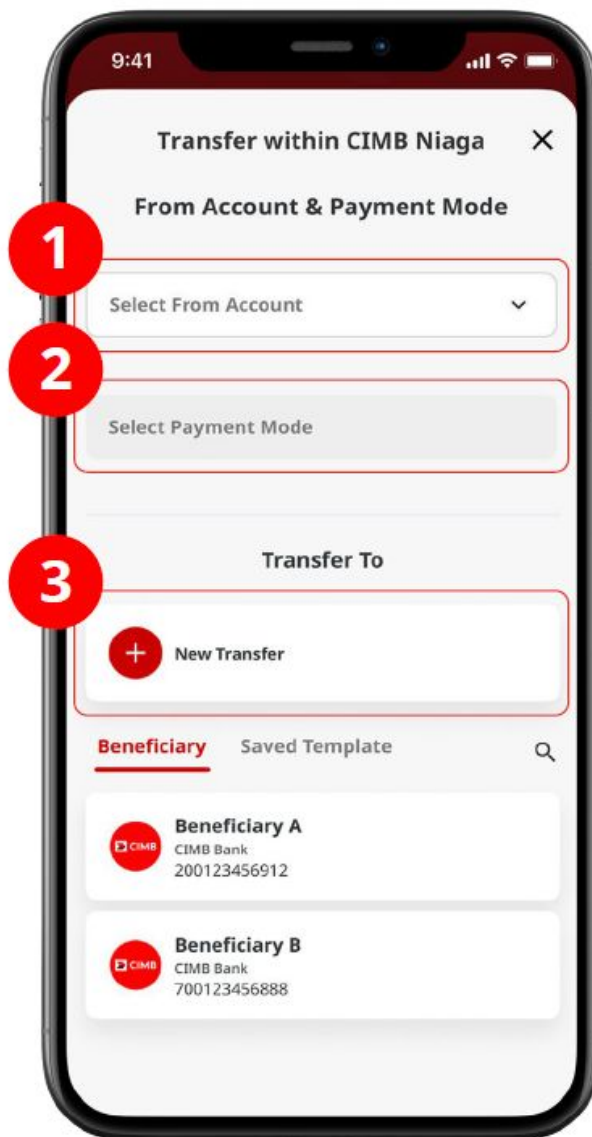
03

MAKER

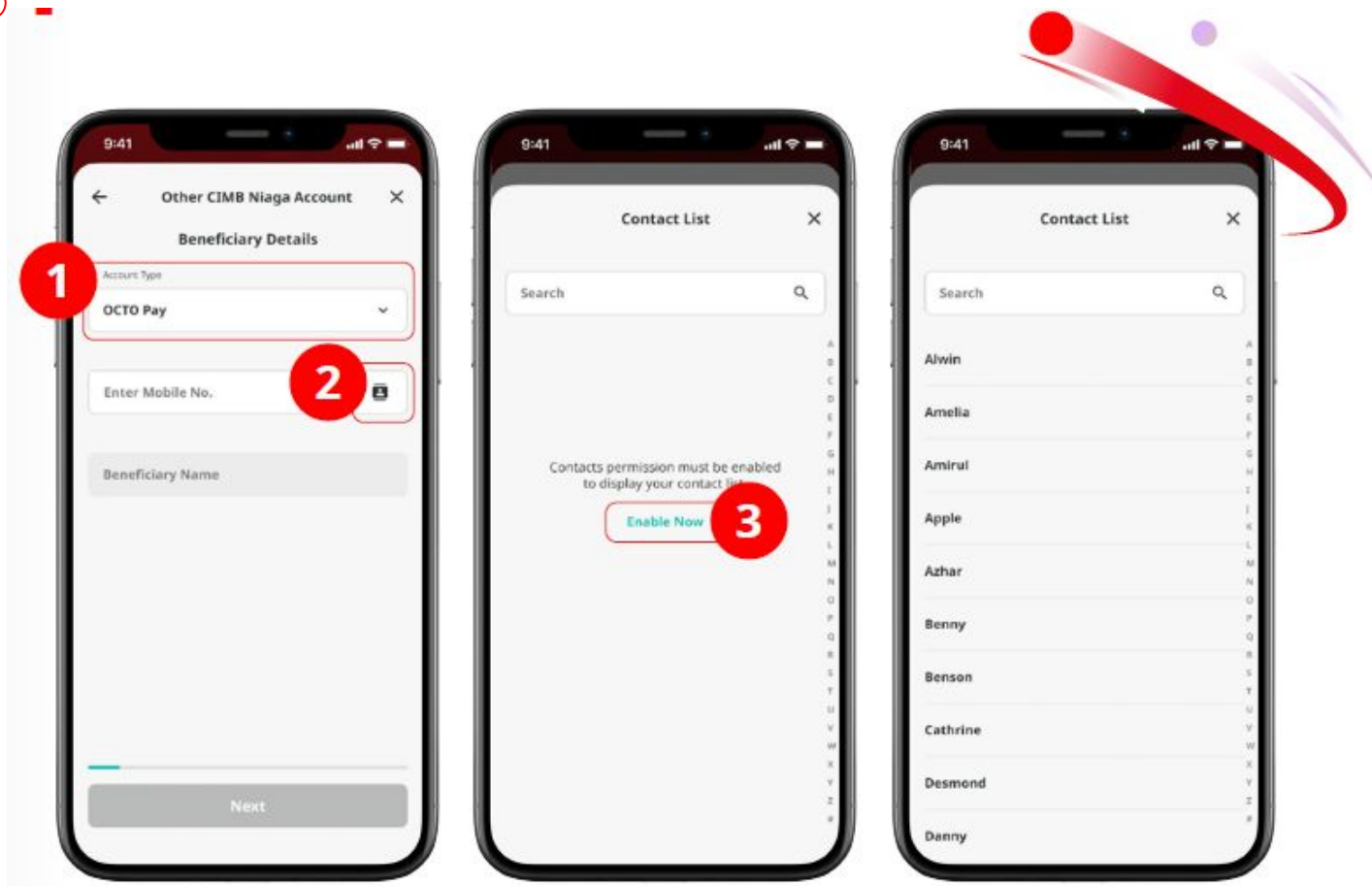
OCTO Pay | Transfer to 3rd Party

Menu : Pay & Transfer > Other CIMB Niaga Account

20



- 1 Choose **From Account**
- 2 Choose **Payment Mode - Other CIMB Niaga Account**
- 3 Click **Next Button**



1 Choose **Account Type - OCTO Pay**

2 Click **Contact List** Icon

3 Click **Enable Now**

STEP

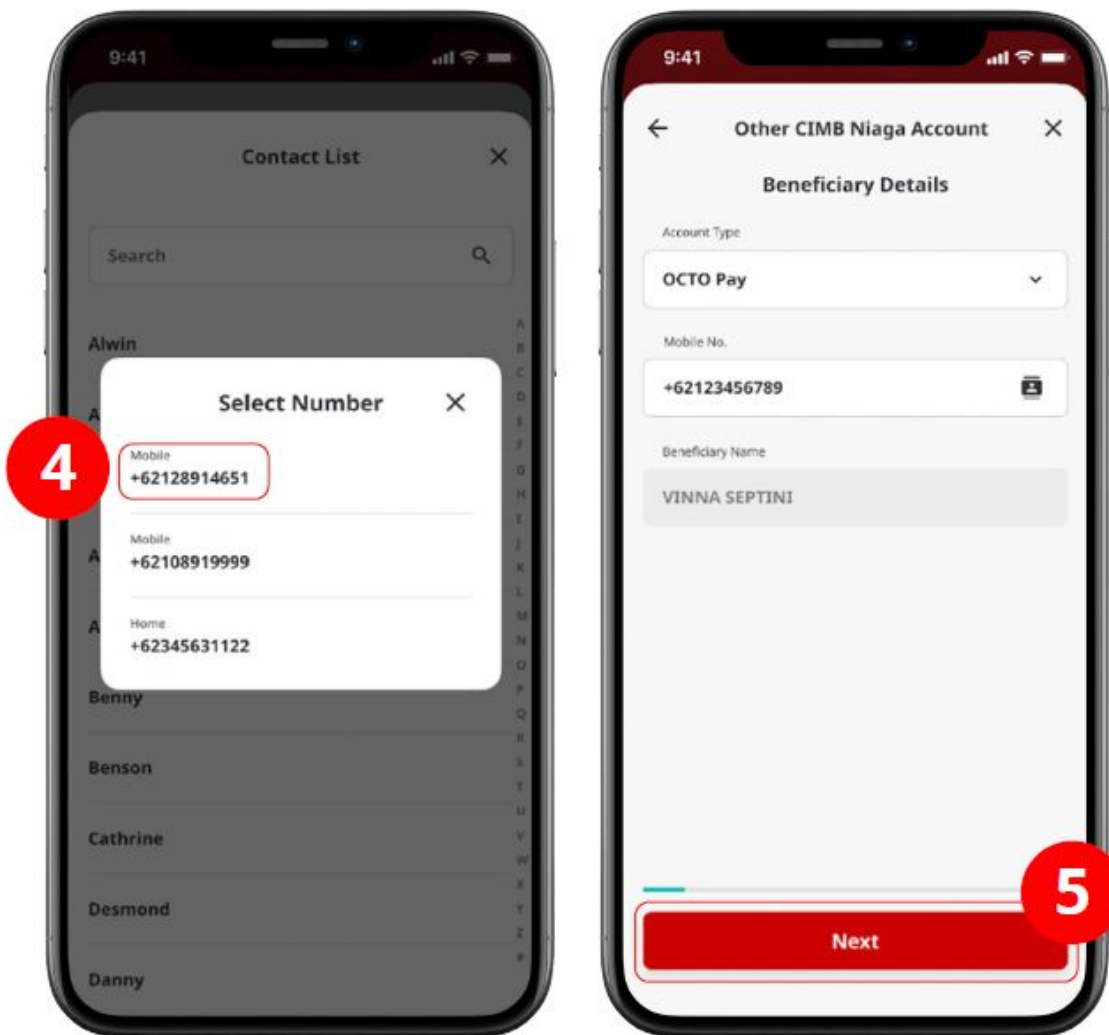
05

MAKER

OCTO Pay | Transfer to 3rd Party

Menu : Pay & Transfer > Other CIMB Niaga Account

22

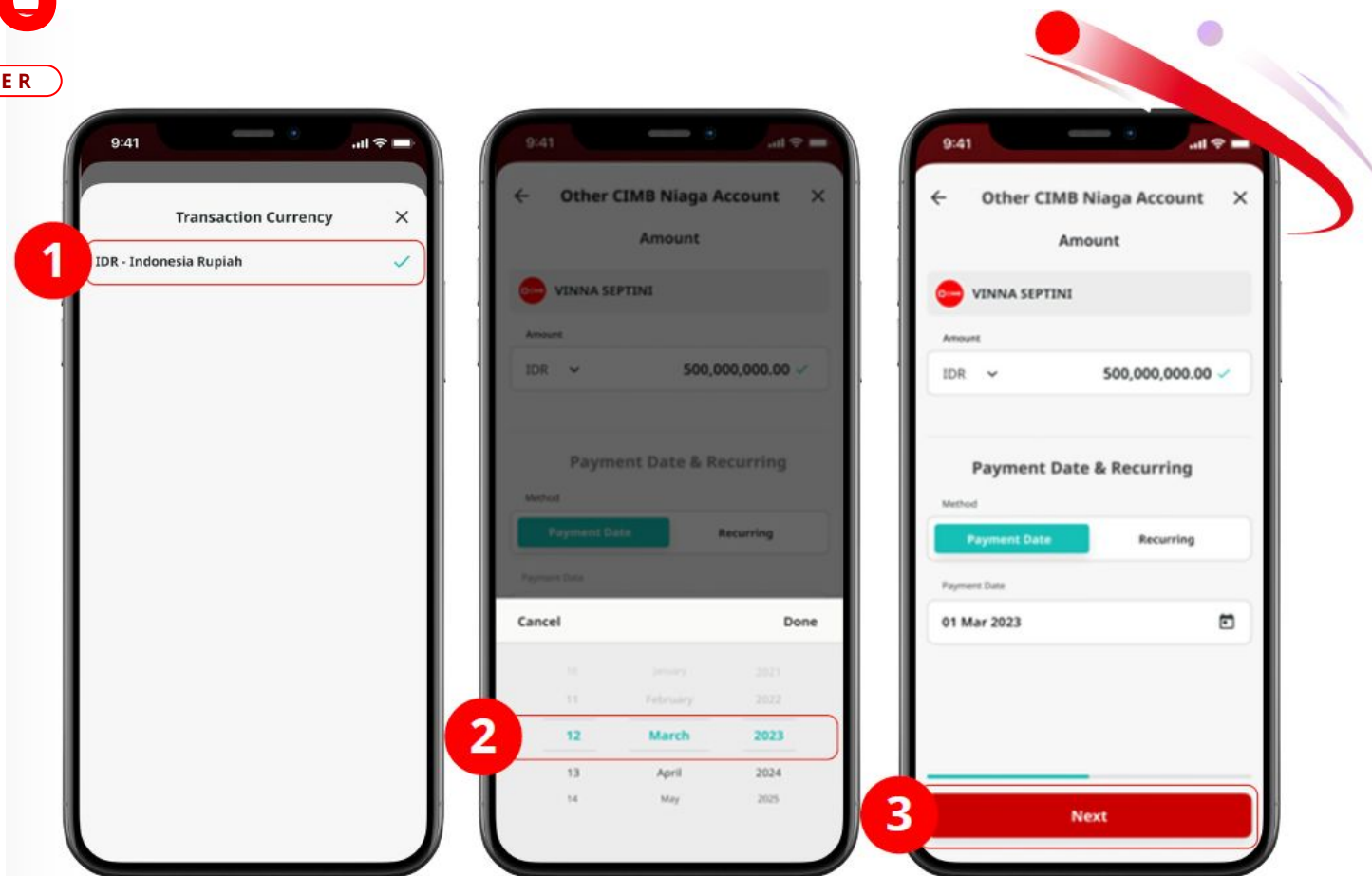


4

Choose **Phone Number**

5

Click **Next**



1 Choose **Currency** and Input the **Transfer Amount**

2 Choose **Payment Date**

3 Click **Next**

STEP

07

MAKER

OCTO Pay | Transfer to 3rd Party

Menu : Pay & Transfer > Other CIMB Niaga Account

24

9:41

Other CIMB Niaga Account

Other Details

Customer Reference No.

Inhouse Transfer

Other Payment Details

July

Payment Advice

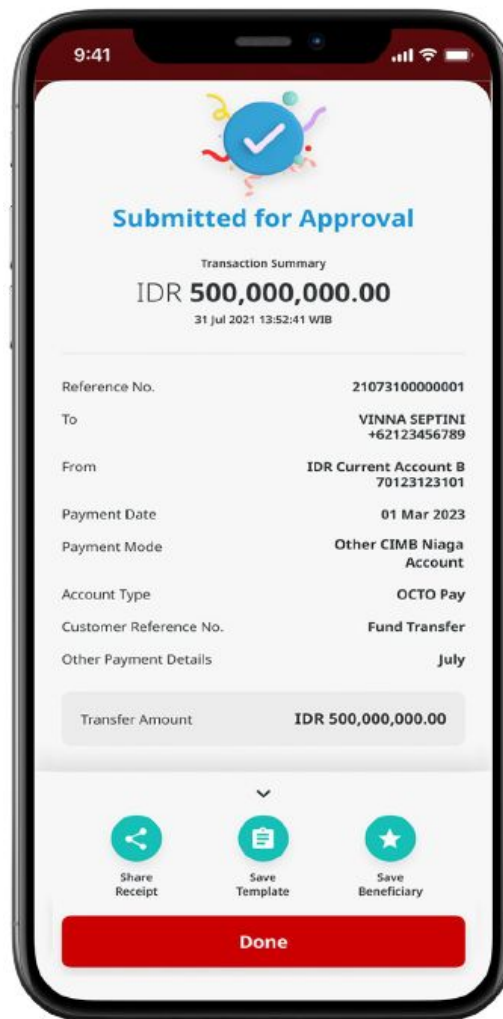
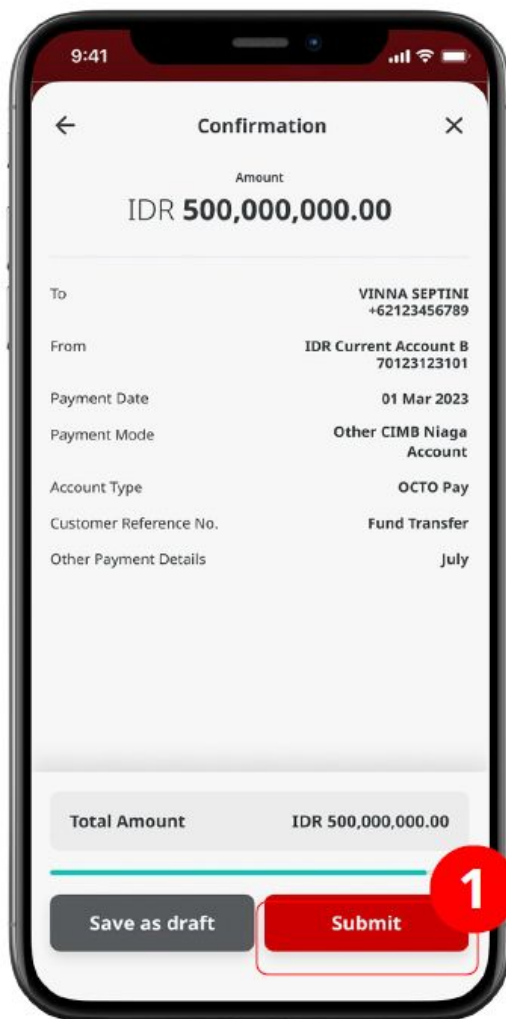
No Advice Simple Advice

Note
Sender and recipient will see these notes in their bank statement.

Next

1 Fill in the **Other Details**

2 Click **Next**



Review Transaction Details

1 Click **Submit**

System will navigate to
Acknowledgement Page

STEP

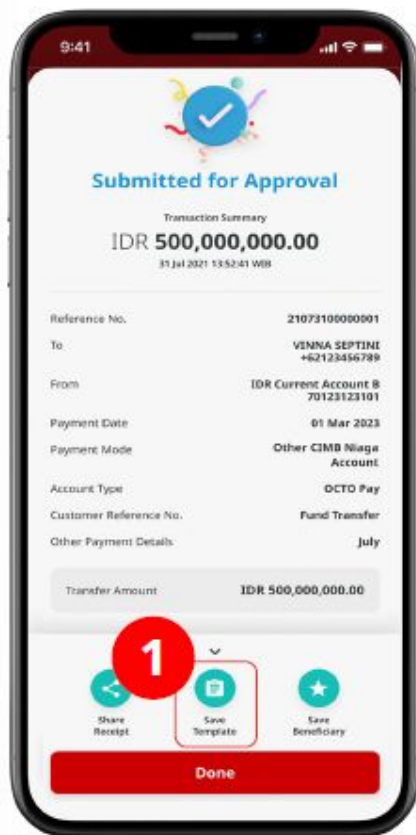
09

MAKER

OCTO Pay | Transfer to 3rd Party

Menu : Pay & Transfer > Other CIMB Niaga Account

26



1

Click **Save as Template**

2

Input the **Template Name**

3

Click **Next**

STEP

10

MAKER

OCTO Pay | Transfer to 3rd Party

Menu : Pay & Transfer > Other CIMB Niaga Account

27

The image shows two smartphone screens side-by-side, illustrating the 'Save Template' process for a transfer. The left screen is titled 'Save Template' and shows the 'Amount' step. It has a red circle with the number 4 next to the 'Amount' input field, which contains 'IDR' and '500,000,000.00'. A red circle with the number 5 is next to the 'Next' button at the bottom. The right screen is also titled 'Save Template' and shows the 'Other Details' step. It has a red circle with the number 6 next to the 'Other CIMB Niaga Account' input field, which contains 'July'. A red circle with the number 7 is next to the 'Next' button at the bottom. The screens also show a 'Customer Reference No.' field, 'Other Payment Details', and 'Payment Advice' options ('No Advice' and 'Simple Advice').

- 4 Input the **Amount**
- 5 Click **Next**
- 6 Fill in the **Other Details**
- 7 Click **Next**

STEP

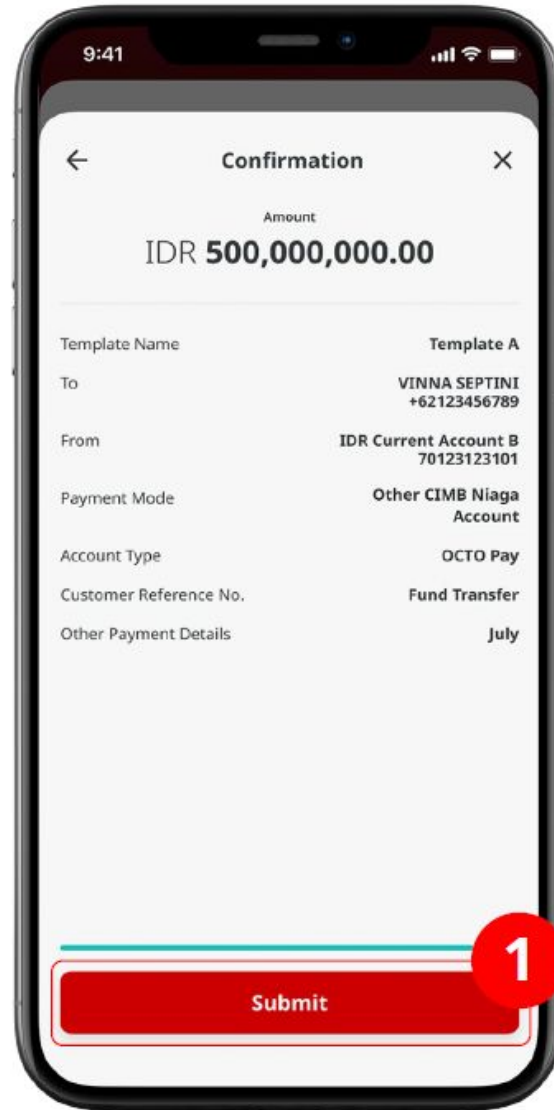
11

MAKER

OCTO Pay | Transfer to 3rd Party

Menu : Pay & Transfer > Other CIMB Niaga Account

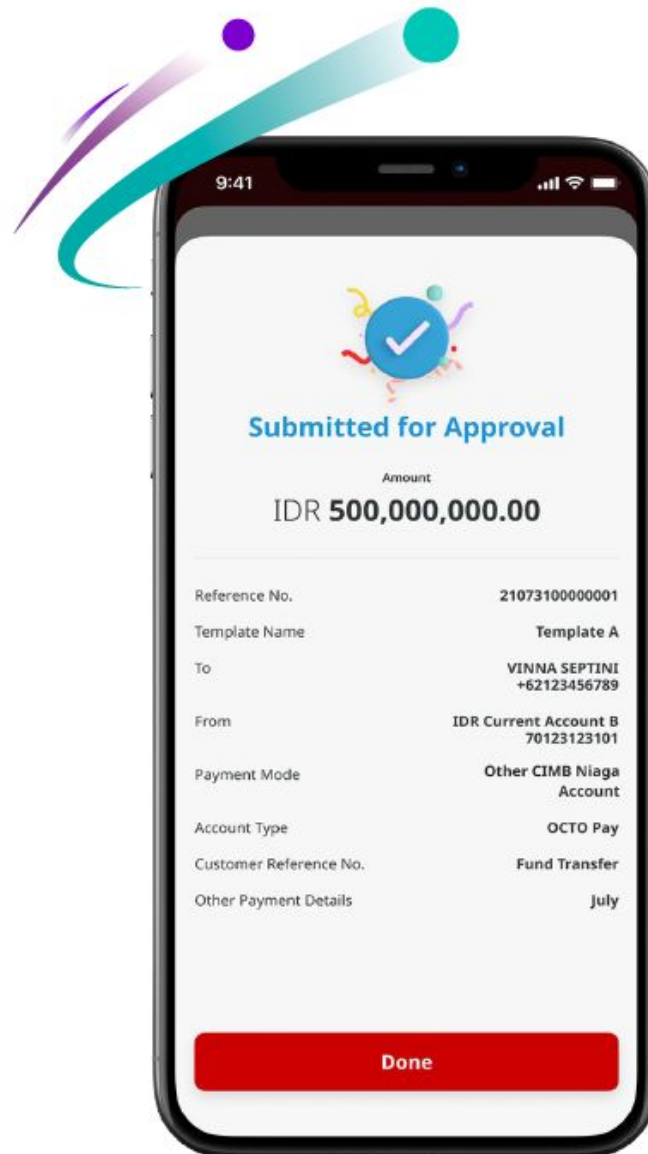
28



Review **Detail Transaction**

1

Click **Submit**



If Transaction is Success,
system will show the
Acknowledgement page



TRANSFER TO 3RD PARTY

Approve Transaction

Mobile Token

Hard Token



TRANSFER TO 3RD PARTY **Approve Transaction**

Mobile Token

Approval Process - Mobile Token is used for
users who have **Mobile Token**



Login as **Approver**

- 1 Click **Password Login**
- 2 Input the **Password**
- 3 Click **Proceed**

STEP

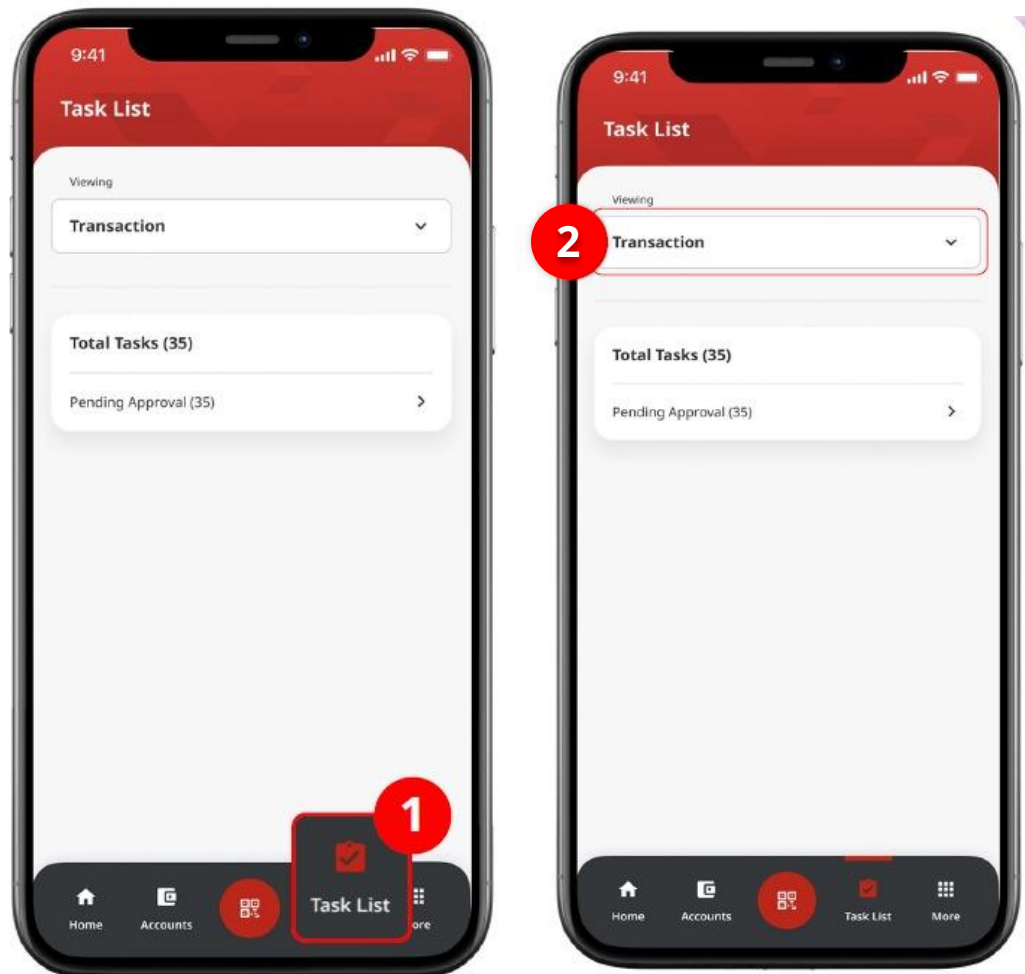
02

APPROVER

Approve Transaction | Transfer to 3rd Party

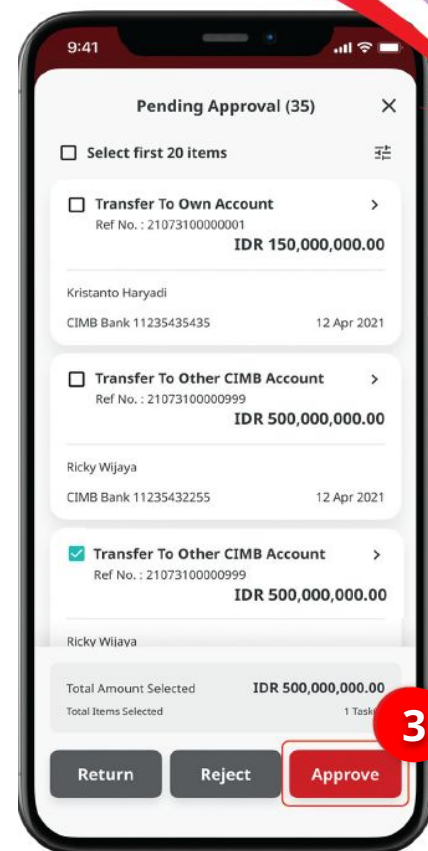
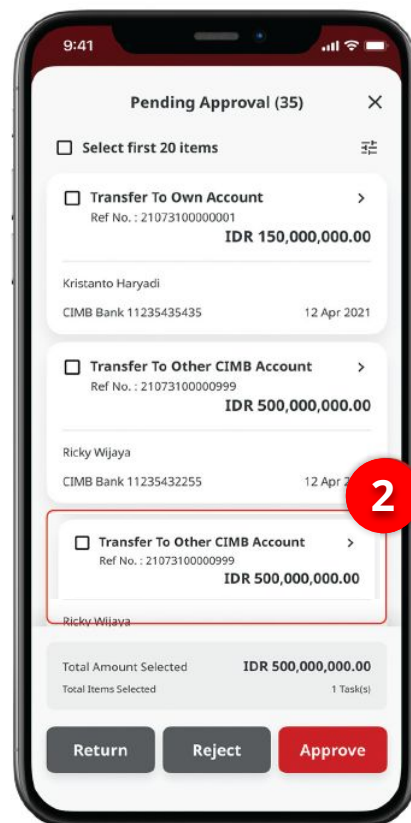
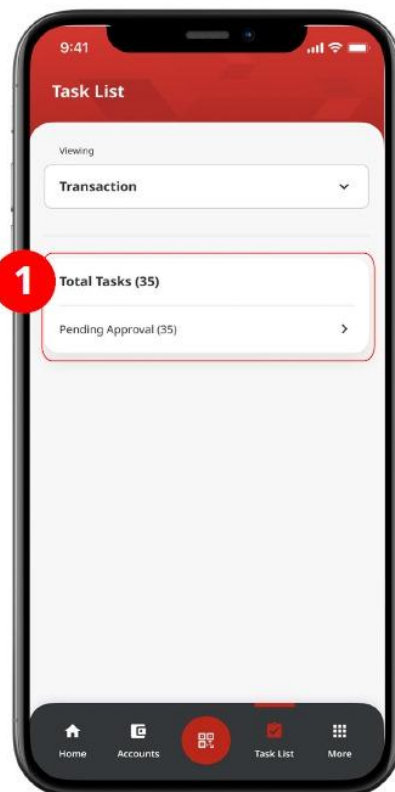
Menu : Pay & Transfer > Transfer to 3rd Party

33

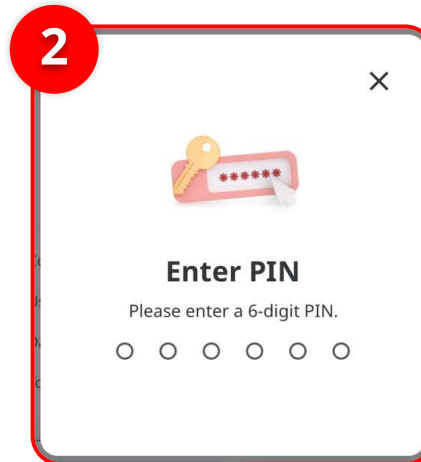
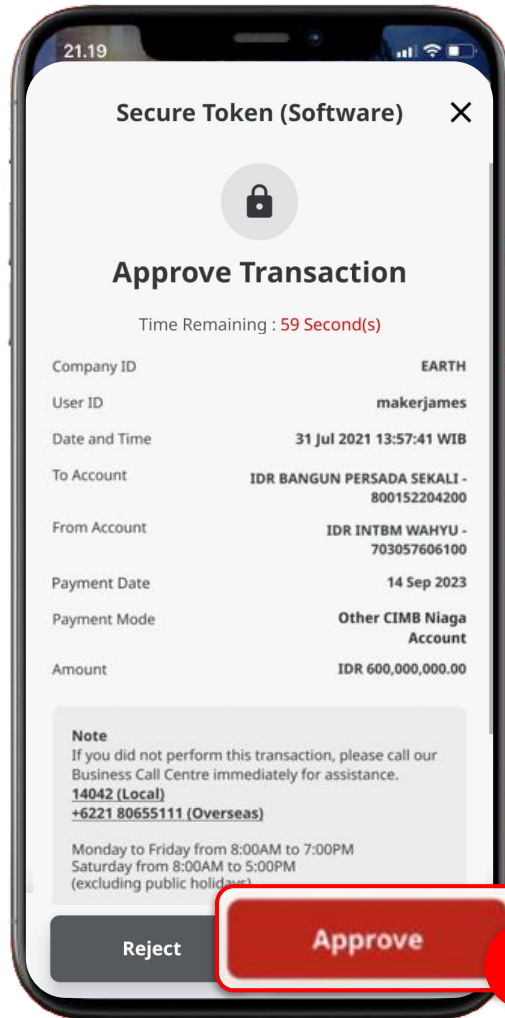


1 Click **task List** Menu

2 Choose **Transaction** as **Viewing**

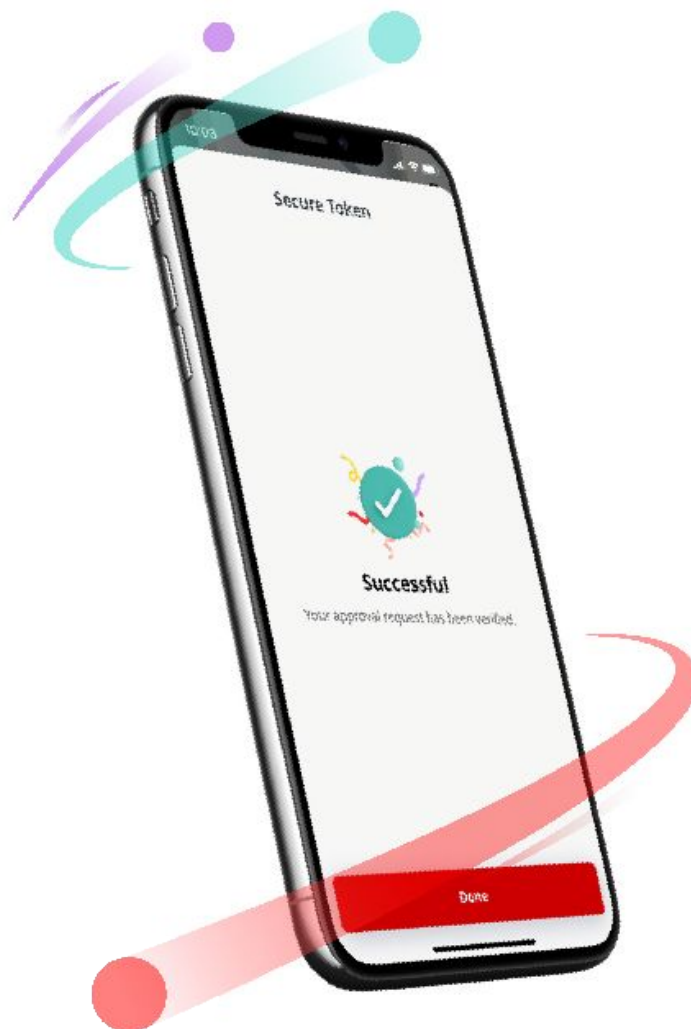


- 1 Choose **Pending Approval**
- 2 Choose **Transaction**
- 3 Click **Approve**



1 Click **Approve**

2 Input the **Pin**



If Transaction is Success,
system will show the
Acknowledgement page



Transfer to 3rd Party **Approve Transaction**

Hard Token

Approval Process - Hard Token is used for
users who have Hard-Token



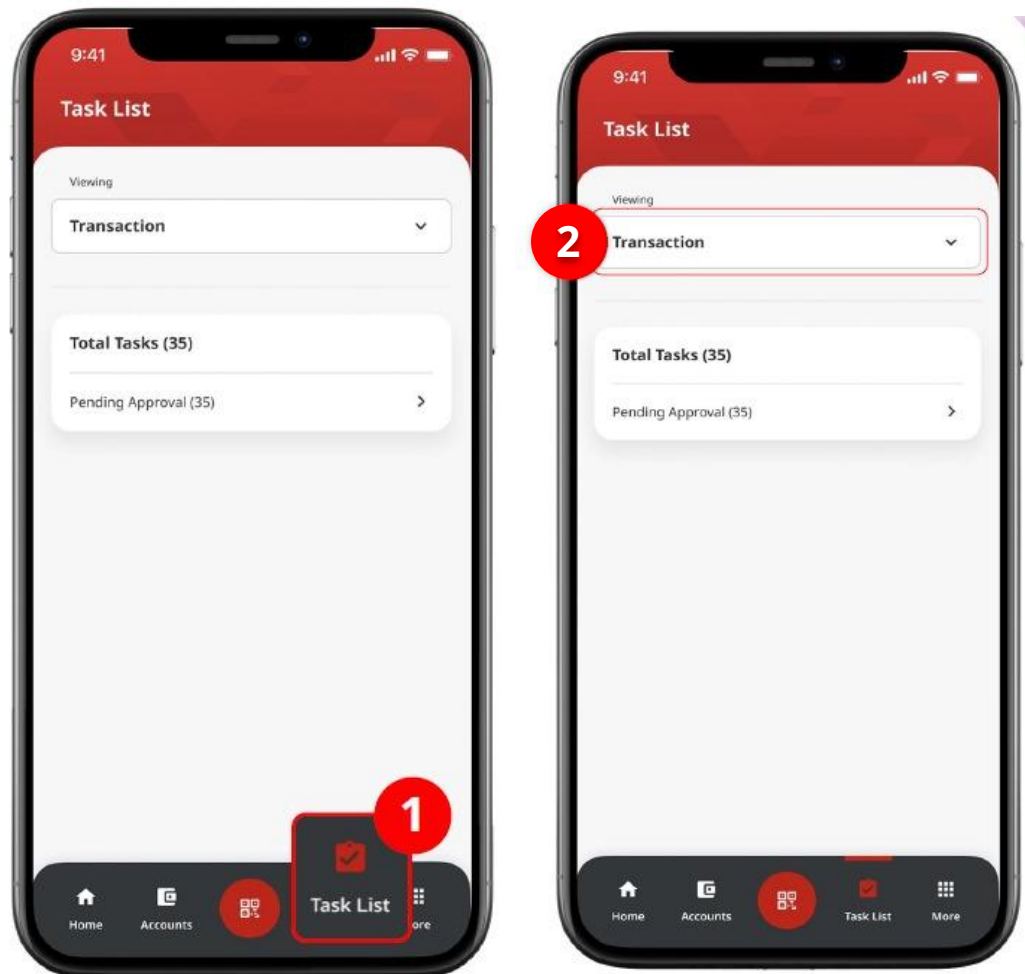
Login as **Approver**

- 1 Click **Password Login**
- 2 Input the **Password**
- 3 Click **Proceed**

STEP

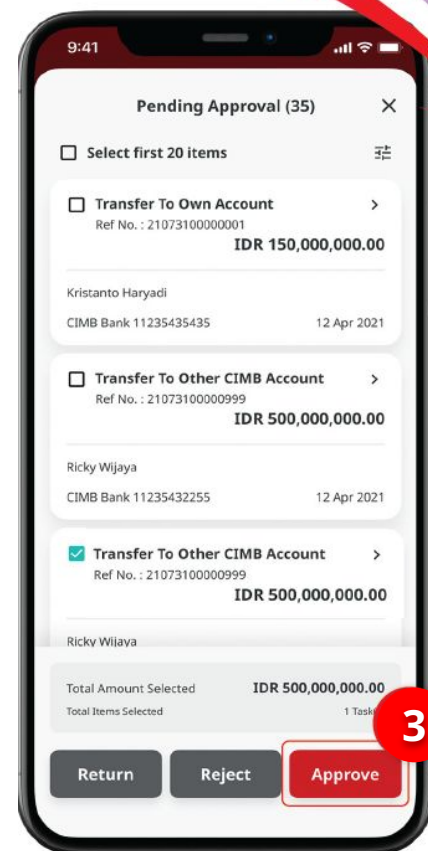
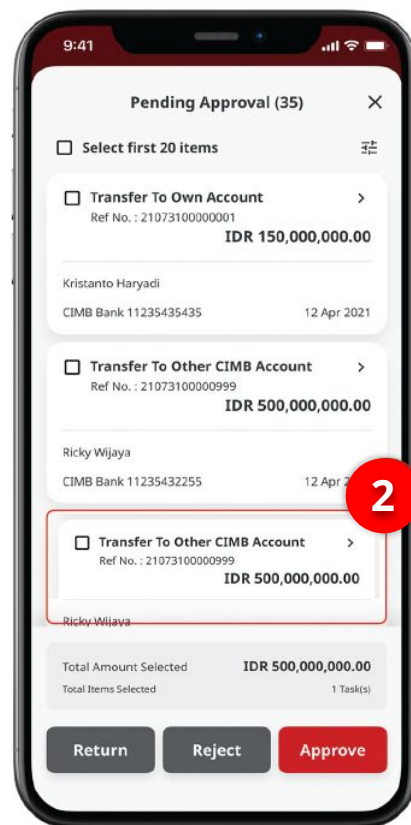
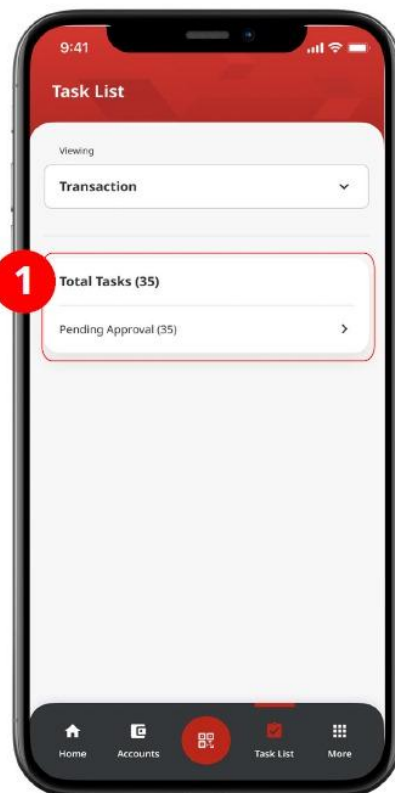
02

APPROVER

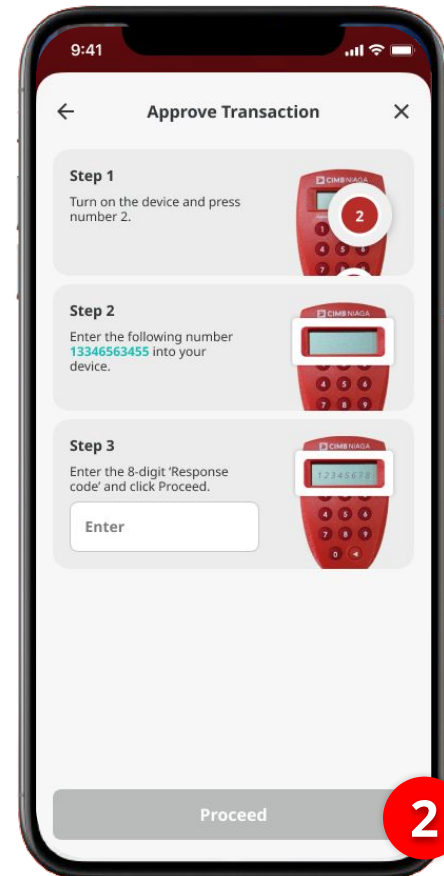
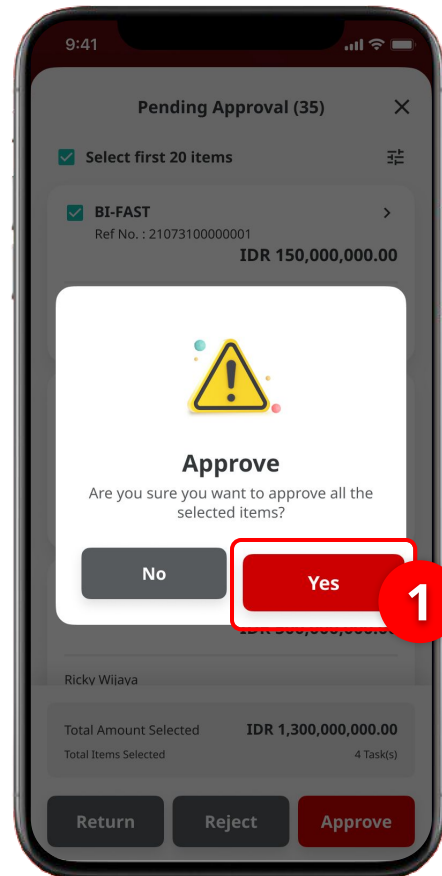


1 Click **Menu task List**

2 Choose **Transaction** as **Viewing**



- 1 Choose **Pending Approval**
- 2 Choose **Transaction**
- 3 Click **Approve**

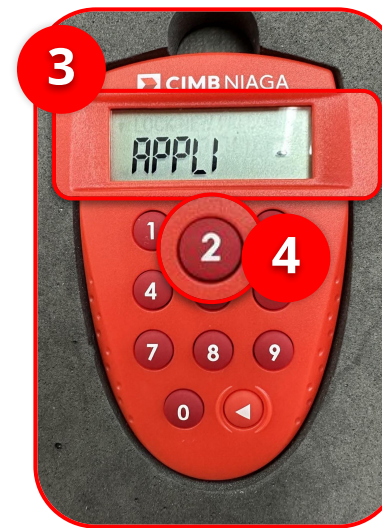


1

Click Yes

2

System will navigate to **Approve Transaction Page**



- 1 Turn on the Hard Token device by **Clicking Play button**
- 2 Enter the **Secure pin number**
- 3 if the pin is correct, system will show **"APPLI"** on device Screen.
- 4 Click **"2" button** to go to **Transaction Signing Feature**.

Step 2

Enter the following number
13346563455 into your
device.

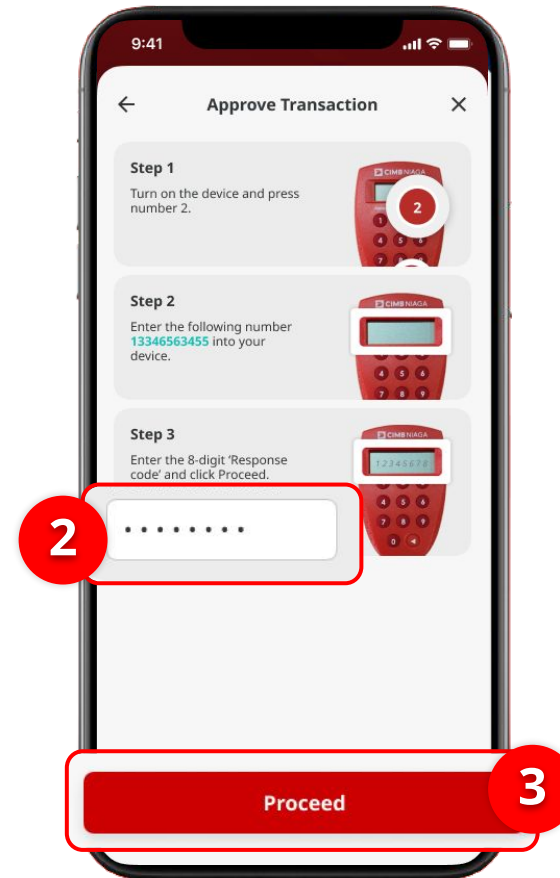


1

Input the code that show on
the **Pop-up Box website**

2

Click **Play Button**



- 1 Hard-Token device will show the **8-digit Code**
- 2 Input the code to **Approve Transaction Pop up**
- 3 Click **Submit button**

STEP

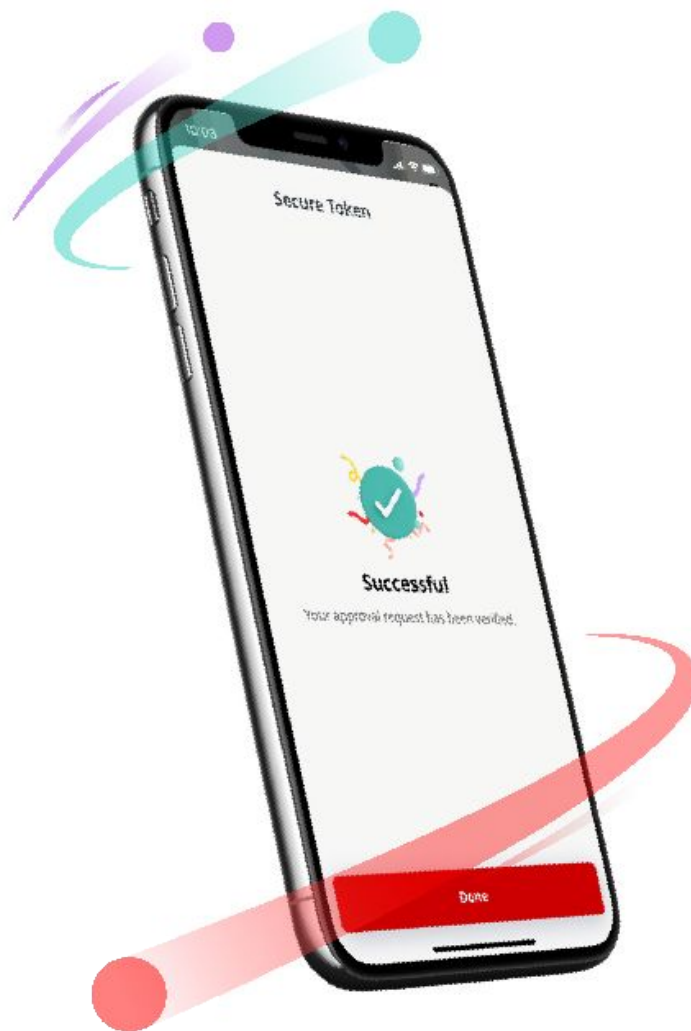
08

APPROVER

Approve Transaction | Transfer to 3rd Party

Menu : Pay & Transfer > Transfer to 3rd Party

45



If Transaction is Success,
system will show the
Acknowledgement page



OCTO Biz
BY  **CIMB NIAGA**

