

A tall, modern skyscraper with many lit windows, viewed from a low angle. The building is partially obscured by a large, stylized graphic of a red and orange wave on the left side of the image.

OCTO Biz

Onboarding Hybrid Onboarding

TUTORIALOCTOBIZ2025

KEJAR MIMPI

Onboarding

Hybrid Onboarding

Onboarding – Hybrid Onboarding adalah proses dimana pengguna melakukan pendaftaran akun ke OCTO Biz

03

Application
Process

12

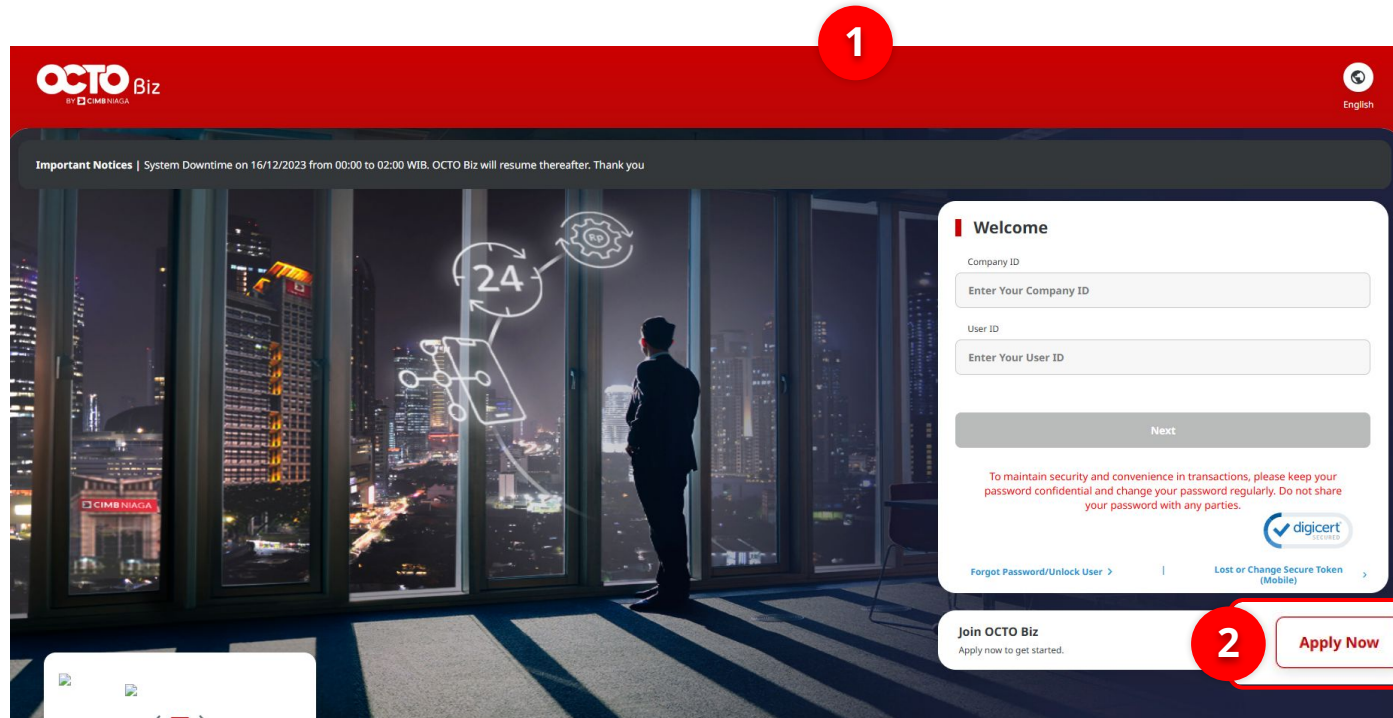
Check Application
Status

16

Retrieve Draft
Application

Hybrid Onboarding

Application Process



1 Kunjungi Website OCTO Biz di:
www.octobiz.co.id

2 Klik ***Apply Now*** pada bagian
bawah ***screen***

The screenshot shows the OCTO Biz sign-up page. The background features a man in a suit looking out a window at a city skyline at night. Overlaid on the right is a white sign-up form with a red border. The form has three numbered steps: 1. A dropdown menu labeled 'What would you like to do? *' with 'Apply for New Application' selected. 2. An input field for 'Account No *' with the value '111700001023' and a tooltip that says 'Enter the CIMB Niaga Business Current Account Number you wish to register to OCTO Biz.' 3. Two buttons at the bottom: 'Back' and 'Next'.

OCTO Biz
BY CIMB NIAGA

Important Notices | TEST1

English

Sign Up for OCTO Biz

What would you like to do? *

1 Apply for New Application

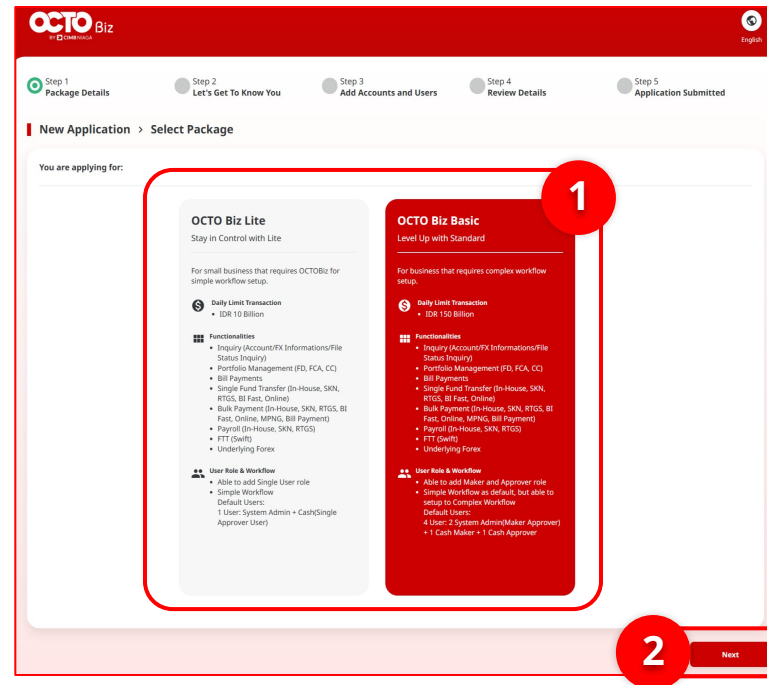
Account No * Enter the CIMB Niaga Business Current Account Number you wish to register to OCTO Biz.

2 111700001023

Back 3 Next

Sistem akan memunculkan **Pop Up Box Sign Up for OCTO Biz**

- 1 Pilih **Apply for New Application**
- 2 Masukkan **Account No** yang **belum pernah** didaftarkan
- 3 Jika sudah sesuai, Klik **Next**



Sistem akan menampilkan halaman ***Package Details***

1 Langkah pertama, **Pilih *Package*** yang diinginkan

CATATAN:

- Jika nasabah merupakan **Nasabah *Individual***, nasabah hanya dapat memilih ***"OCTO Biz Lite"***
- Jika nasabah **bukan nasabah *Individual***, dapat memilih ***"OCTO Biz Lite"*** maupun ***"OCTO Biz Basic"***

2 Jika sudah, klik ***Next***

Step 1 Package Details **Step 2** Let's Get To Know You **Step 3** Add Accounts and Users **Step 4** Review Details **Step 5** Application Submitted

New Application > Company & Contact Information

Company Details

Account Number: 800013429100 Account Name: AG** JA** TE***** JU***** TE***** 7* KA*****

Company Information

Company Name * AG** JA** TE***** JU***** TE***** 7* KA***** Tax Identification No. (NPWP) * Enter

Opening Branch * Select Address: PO***** WP***** TV***** QR***** WP***** SK** 68**

Primary Contact Information

Note: You can have a maximum of two (2) Contact Persons.

Name * Enter Email Address * Enter

Country Code * +62 Mobile Number * 123456789 Country Code * +62 Phone Number (Work) 123456789

Correspondence Address: Same as the company address registered with the Bank

Administrator Contact Information

Name * Enter Email Address * Enter

Country Code * +62 Mobile Number * 123456789 Country Code * +62 Phone Number (Work) 123456789

Delete Add More

Next

Sistem akan menampilkan
Langkah 2: "Let's Get To Know You"

- 1 Bagian **Company Details** dan **Company Address** akan terisi otomatis oleh sistem
- 2 Lengkapi bagian **Primary Contact Information**. Isi data dengan **valid** karena **email registration** akan dikirim melalui **email** ini
- 3 Lengkapi bagian **Administrator Contact Information** sebagai data informasi untuk registrasi
- 4 Jika sudah sesuai, Klik **Next**

LANGKAH 05a

OCTO Biz

Step 1 Package Details Step 2 Let's Get To Know You Step 3 Add Accounts and Users Step 4 Review Details Step 5 Application Submitted

New Application > Add Accounts and Users

1 Select Account

☒ All Accounts
All accounts to be accessible via OCTO Biz. You can manage your account preferences on OCTO if you change your mind.

☐ Select Individual Accounts
If you wish to have only selected accounts accessible via OCTO Biz.

If you wish to have only selected accounts accessible via OCTO Biz:

Account No. **Add Account**

Account Name Account Number **Delete**

AGBN JASA TEKNOLOGI KUKUR TERKINI TI KARANTENAN

2 User Details

Note: You can have a maximum of ten (10) users.

Role	User ID	Name (as per KTP or Passport)	Mobile Number	Email Address	Is Authorised Person
System Administrator 1 (Maker)			+62		☐
System Administrator 2 (Approver)			+62		☐
Maker			+62		☐
Approver			+62		☐
Select			+62		☐

Add Another User

3 Authorised Person Details

New Primary Contact Information	Name (as per KTP or Passport)	KTP or Passport Number	Designation	Mobile Number	Email Address
☐	OCTA	3174567211222222	authorised person	+6213543211456	octa@mail.com

Add Another User

4 ☐ I agree and accept the [Terms & Conditions](#)

5 **Next**

Save as Draft

Untuk *User* yang memilih **OCTO Biz Basic**, sistem akan menampilkan halaman **Langkah 3: Add Account & Users**

- 1 Pilih **All Account** (untuk memilih seluruh akun) atau **Select Individual Account** (untuk memilih beberapa akun)
- 2 Lengkapi seluruh **informasi user** (*Maker & Approver*) dan pilih **Authorised Person**
- 3 Sistem akan secara **otomatis** menambahkan **list Authorised person**
- 4 Baca **syarat dan ketentuan** yang berlaku, lalu **cek box**
- 5 Jika sudah sesuai, klik **Next**

LANGKAH
05b

1 Select Account

☒ All Accounts
All accounts to be accessible via OCTO Biz. You can manage your account preferences on OCTO if you change your mind.

☐ Select Individual Accounts
If you wish to have only selected accounts accessible via OCTO Biz:

☐ Select Individual Accounts
If you wish to have only selected accounts accessible via OCTO Biz:

Account No. Add Account

Account Name Account Number Delete

2 User Details *
Note: You can have a maximum of ten (10) users.

Role	User ID	Name (as per KTP or Passport)	Mobile Number	Email Address	Is Authorised Person
Single Access User (SAU)			+62		☐

Only alphabetical, numeric, underscore dash are allowed

Add Another User

3 Authorised Person Details *

Use Primary Contact Information	Name (as per KTP or Passport)	KTP or Passport Number	Designation	Mobile Number	Email Address
☐	OCTA	31745677211222222	authorised person	+62813543211456	octa@mail.com

Add Another User

4 ☐ I agree and accept the [Terms & Conditions](#)

5 Save as Draft Next

Untuk *User* yang memilih **OCTO Biz Lite**, sistem akan menampilkan halaman **Langkah 3: Add Account & Users**

- 1** Pilih **All Account** (untuk memilih **seluruh akun**) atau **Select Individual Account** (untuk memilih **beberapa akun**)
- 2** Lengkapi seluruh **informasi user** (*Single Access User*) dan klik **Authorised Person**
- 3** Sistem akan secara **otomatis** menambahkan **list Authorised person**
- 4** Baca **syarat dan ketentuan** yang berlaku, lalu **cek box**
- 5** Jika sudah sesuai, klik **Next**

Step 1
Package Details

Step 2
Let's Get To Know You

Step 3
Add Accounts and Users

Step 4
Review Details

Step 5
Application Submitted

New Application > Review Details

Package Details

Package
OCTO Biz Basic

Company Details

Account Number
80013429100

Account Name
AG** JA** TE***** NU**** TE***** 7* KA*****

Company Information

Company Name
AG** JA** TE***** NU**** 7* KA*****

Tax Identification No. (NPWP)
8176426872834687

Opening
23 - JAKARTA - SENTRA

Address
PO***** MW***** TV***** WU***** QR***** MP***** NW***** SK*****

Primary Contact Information

Name
OCTA

Email Address
octa@gmail.com

Mobile Number
+6281312312345

Phone Number (Work)
-

Correspondence Address
Same as the company address registered with the Bank

Administrator Contact Information

Name
ADMIN 1

Email Address
NGB@gmail.com

Mobile Number
+62812944321100

Phone Number (Work)
-

New Account(s)

Account Name	Account Number
AGEN JASA TEKNOLOGI HUKUM TERKINI 71 KUNAWTE*****	80013429100

User Details

Role	User ID	Name (as per KTP or Passport)	Mobile Number	Email Address	Is Authorized Person
System Administrator 1 (Maker)	SYSDADMIN1	admin1	+628785631112	sysadmin1@mail.com	No
System Administrator 2 (Approver)	SYSDADMIN2	admin2	+6281987653122	sysadmin2@mail.com	No
Maker	MAKER01	OCTA	+62813543211455	octa@mail.com	Yes
Approver	APPRO1	OCTI	+6281778909876	octi@mail.com	No

Authorised Person Details

Name (as per KTP or Passport)	KTP or Passport Number	Designation	Mobile Number	Email Address
OCTA	3174567211122222	authorized person	+62813543211455	octa@mail.com

Back

1

Submit

Sistem akan menampilkan
Langkah 4: *“Review Details”*

- 1
- Periksa seluruh detail akun. Jika sudah sesuai, klik *Submit*

OCTO Biz
BY CIMB NIAGA

English

Step 1 Package Details

Step 2 Let's Get To Know You

Step 3 Add Accounts and Users

Step 4 Review Details

Step 5 Application Submitted

New Application > Application Submitted

Application ID : 11825042800000105
Note: : You can use this Application ID to track the status of your application.

Application submitted. Proceed to the next steps.

Submitted On : 28 Apr 2025 10:28:42 WIB

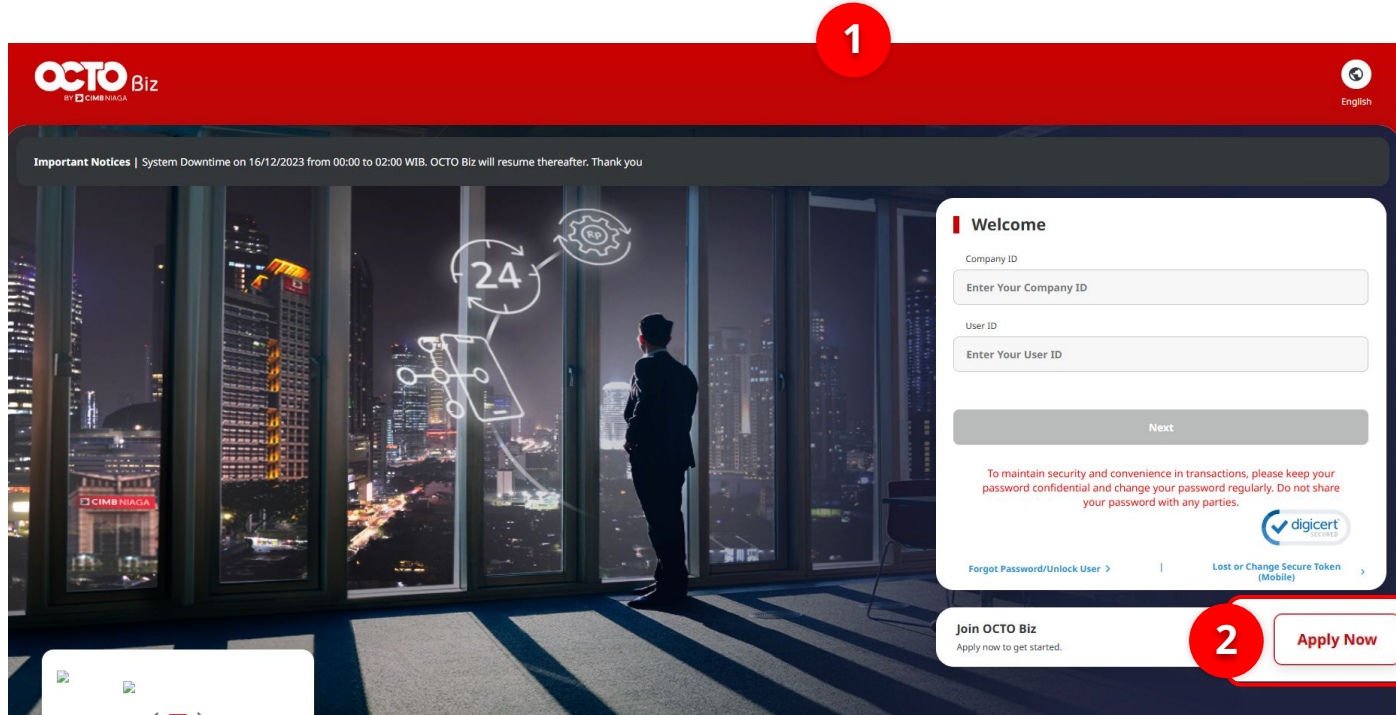
Next Steps:

1. Download a copy of this application form by clicking the "Download" button bellow.
2. Please read and complete the [following checklist](#) before submitting your application to your nearest branch.
3. If we do not hear from you by 05 May 2025, this application will be cancelled and a new one will have to be submitted.

Jika berhasil, sistem akan menampilkan **Langkah 5: "Application Submitted"**

Hybrid Onboarding

Check Application Status



- 1 Kunjungi Website OCTO Biz di: **www.octobiz.co.id**
- 2 Klik **Apply Now** pada bagian bawah **screen**

OCTO Biz
BY CIMB NIAGA

Important Notices | TEST1

Sign Up for OCTO Biz

1 What would you like to do? *

Check Application Status

2 Application Id *

118250428000000105

3 Back Next

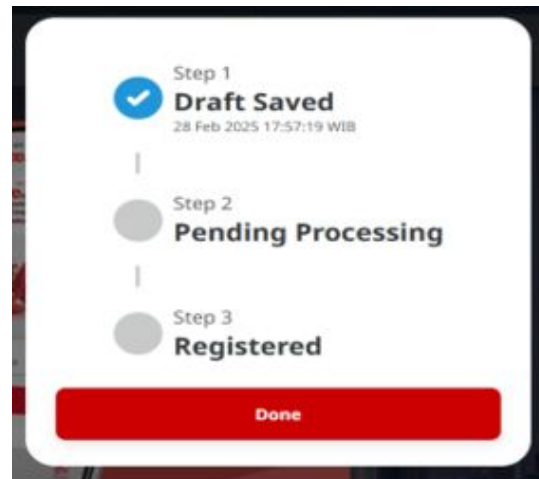
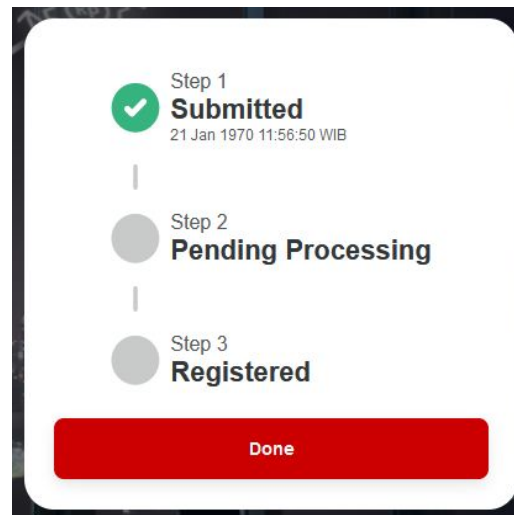
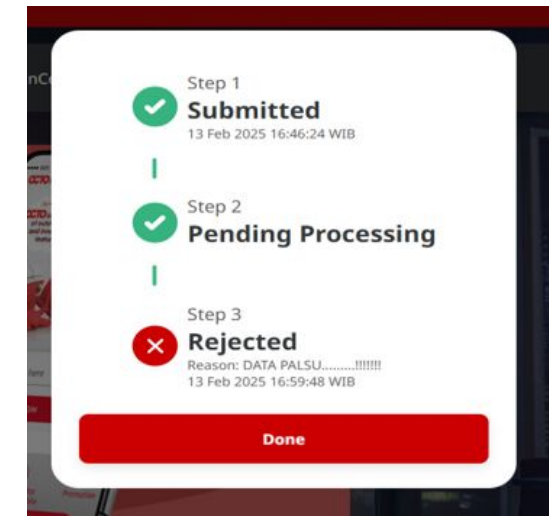
Sistem akan memunculkan **Pop Up Box Sign Up for OCTO Biz**

- 1 Pilih **Check Application Status**
- 2 Masukkan **Application ID** yang terdaftar
- 3 Jika sudah sesuai, Klik **Next**

LANGKAH

03

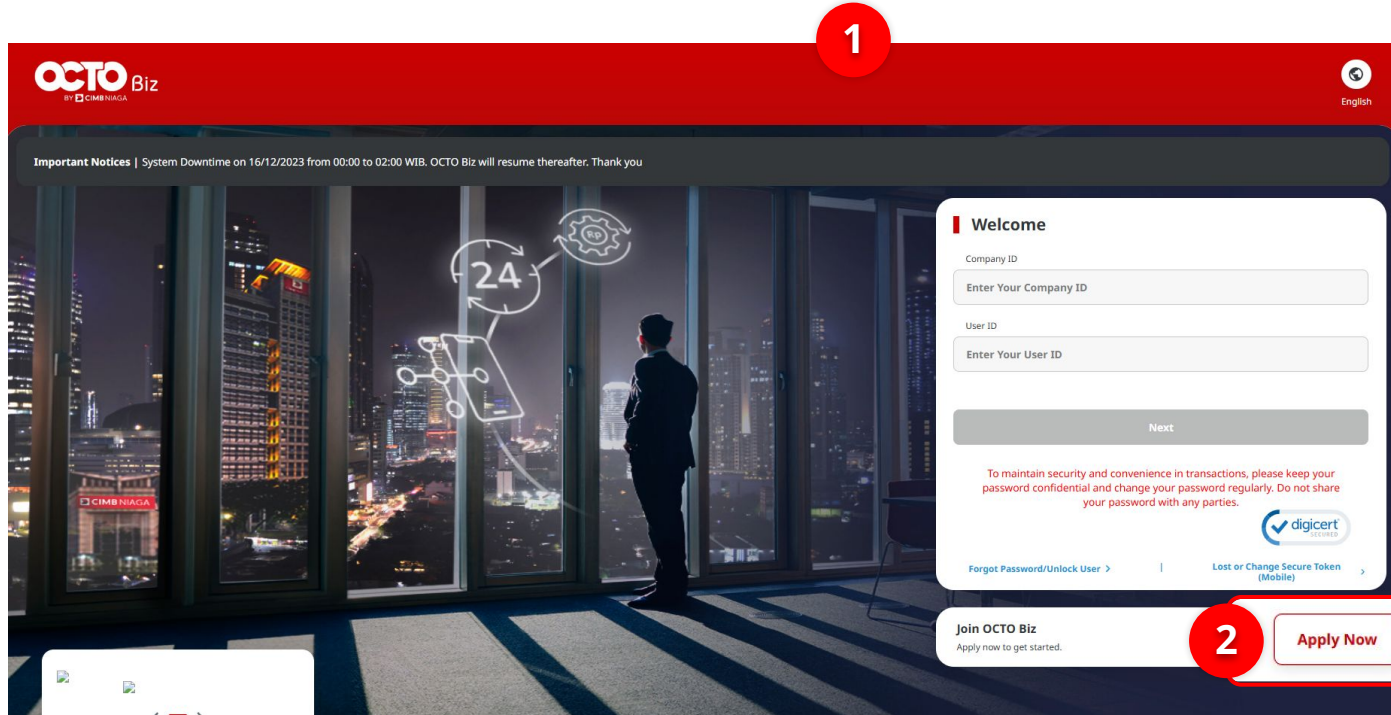
Status Dalam Proses Pengisian

Data berhasil di *Submit*Status saat Sudah di
Verifikasi Bank

1. **Pending Processing:** Data sedang di **review** oleh Bank
2. **Rejected:** Data **ditolak** oleh bank
3. **Registered:** Akun **berhasil didaftarkan**

Hybrid Onboarding

Retrieve Draft Application



1 Kunjungi Website OCTO Biz di:
www.octobiz.co.id

2 Klik **Apply Now** pada bagian
bawah **screen**

The screenshot shows the OCTO Biz Sign Up for OCTO Biz form. The form is overlaid on a background image of a person standing in a modern office with large windows overlooking a city at night. The form has a red header bar with the OCTO Biz logo and a language selector (English). Below the header, there is a dark grey bar with the text 'Important Notices | TEST1'. The main form area is white and contains the following elements:

- 1** A dropdown menu labeled 'What would you like to do? *' with the option 'Retrieve Draft Application' selected.
- 2** A text input field labeled 'Application ID *' with the value 'I18250428000000105' entered.
- 3** Two buttons at the bottom: 'Back' and 'Next'.

Sistem akan memunculkan **Pop Up Box Sign Up for OCTO Biz**

- 1** Pilih **Retrieve Draft Application**
- 2** Masukkan **Application ID** yang terdaftar
- 3** Jika sudah sesuai, Klik **Next**

Notifikasi Onboarding pada Email

1. Notifikasi saat sudah berhasil melakukan submit pada CFO
Subject Email : **OCTO Biz – Hybrid Registration Form**
2. Notifikasi saat proses save as draft atau system time out
Subject Email : **OCTO Biz – One Step Closer to Onboard**
3. Notifikasi saat nasabah belum membawa dokumen mandatory ke cabang terdekat, dan system akan mengirimkan reminder
Subject Email : **[REMINDER]- OCTO Biz – Hybrid Registration Form**
4. Notifikasi saat nasabah belum melanjutkan aplikasi yang masih dalam status Draft dan aplikasi akan expired sesuai dengan parameter Bank User yang telah ditentukan dan system akan mengirimkan reminder
Subject Email : **OCTO Biz – Continue your Application before its expired**
5. Notifikasi saat nasabah belum membawa dokumen mandatory ke cabang terdekat dan aplikasi akan expired sesuai dengan parameter Bank User yang telah ditentukan dan system akan mengirimkan reminder
Subject Email : **OCTO Biz – Please come to branch before its expired**



OCTO Biz
BY  **CIMB NIAGA**

