

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

Onboarding - Hybrid Onboarding is the process where users register an account with OCTO Biz

03

Application
Process

12

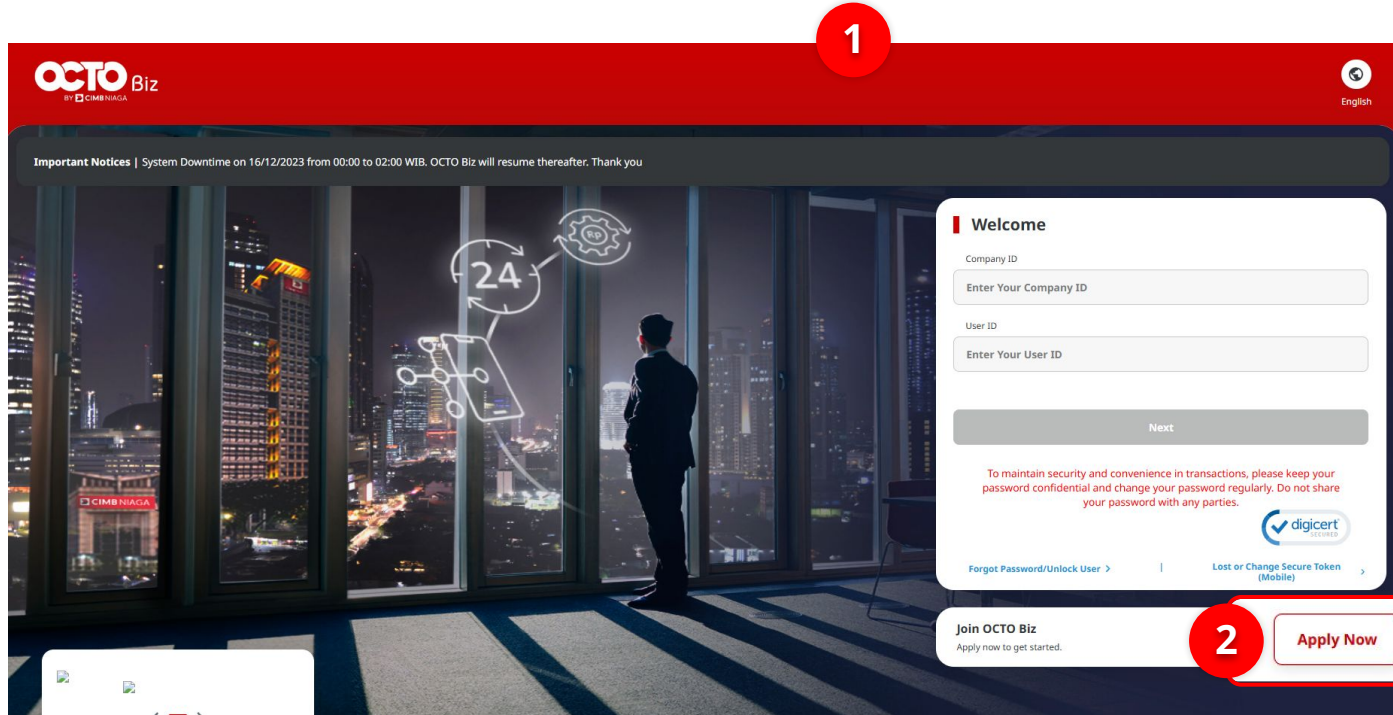
Check Application
Status

16

Retrieve Draft
Application

Hybrid Onboarding

Application Process



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

Visit OCTO Biz on:
www.octobiz.co.id

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

Click **Apply Now**

OCTO Biz
BY CIMB NIAGA

English

Important Notices | TEST1

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

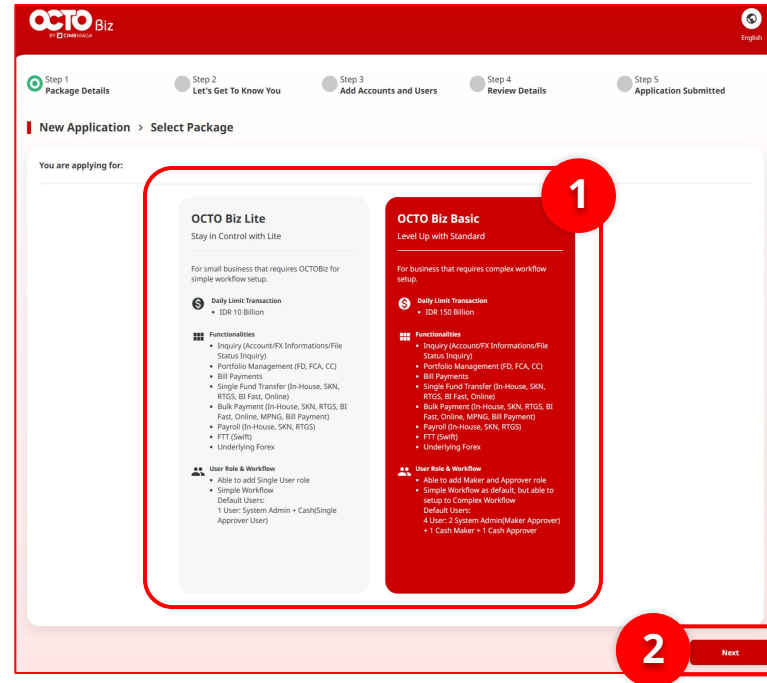
Sistem akan memunculkan **Pop Up Box Sign Up for OCTO Biz**

System will show the **Sign Up for OCTO Biz** pop up

- 1 Pilih **Apply for New Application**
*Choose **Apply for New Application***
- 2 Masukkan **Account No** yang **belum pernah** didaftarkan
Input the Account Number** that has **never been registered
- 3 Jika sudah sesuai, Klik **Next**
*Once ok, click **Next***

Sistem akan menampilkan halaman
Package Details

System will show the **Package Details** page



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

Choose **Package**

CATATAN:
NOTE:

- Jika nasabah merupakan **Nasabah Individual**, nasabah hanya dapat memilih **"OCTO Biz Lite"**
If the customer is an Individual Customer, the customer can only select "OCTO Biz Lite"
- Jika nasabah **bukan nasabah Individual**, dapat memilih **"OCTO Biz Lite"** maupun **"OCTO Biz Basic"**
If the customer is not an individual customer, they can choose "OCTO Biz Lite" or "OCTO Biz Basic".

2 Jika sudah, klik **Next**

Once OK, click **Next**

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 > Company & Contact Information

1 **Company Details**

Account Number: 800813429100 Account Name: AG** JA** TE***** BU***** TE***** 7* KA*****

Company Information

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

Opening Branch * Address:
 Select PO***** BU***** TU***** WU***** QR***** BP***** BW***** SK** 60***

2 **Primary Contact Information**

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

Name * Email Address *
 Enter Enter

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

Correspondence Address
 Same as the company address registered with the Bank

3 **Administrator Contact Information**

Name * Email Address *
 Enter Enter

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

Delete Add More

4 **Next**

Sistem akan menampilkan **Langkah 2: “Let’s Get To Know You”**

System will show the **Langkah 2: “Let’s Get to Know You”** page

- 1 Bagian **Company Details** dan **Company Address** akan **terisi otomatis** oleh sistem
On Company Details & Company Address will automatically filled by system
- 2 Lengkapi bagian **Primary Contact Information**. Isi data dengan **valid** karena **email registration** akan dikirim melalui **email** ini
Complete the Primary Contact Information part. Input valid data because email registration will sent to email
- 3 Lengkapi bagian **Administrator Contact Information** sebagai data informasi untuk registrasi
Complete the Administrator Contact Information as information data to register
- 4 Jika sudah sesuai, Klik **Next**
Once OK, click Next

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LANGKAH

Step 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.

Step 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	In Authorised Person
System Administrator 1 (Maker)					☐
System Administrator 2 (Approver)					☐
Maker					☐
Approver					☐
Select					☐

Step 3: Authorised Person Details

Use Primary Contact Information	Name (as per KTP or Passport)	KTP or Passport Number	Designation	Mobile Number	Email Address
☐	OCTO	3174567721122222	authorised person	+6213543211456	octo@mail.com

Step 4: Terms and Conditions

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

Step 5: Next

Untuk *User* yang memilih **OCTO Biz Basic**, sistem akan menampilkan halaman **Langkah 3: Add Account & Users**. For *User* that choose **OCTO Biz Basic**, system will show the **Langkah 3: Add Account & Users** page.

1. Pilih **All Account** (untuk memilih **seluruh akun**) atau **Select Individual Account** (untuk memilih **beberapa akun**).
Choose **All Account** (to select all Account) or **Select Individual Account** (to choose several account).
2. Lengkapi seluruh **informasi user** (Maker & Approver) dan pilih **Authorised Person**.
Complete **all User Information** (Maker & Approver) and choose **Authorised Person**.
3. Sistem akan secara **otomatis** menambahkan **list Authorised person**.
System will automatically add the **Authorised Person List**.
4. Baca **syarat dan ketentuan** yang berlaku, lalu **cek box**.
Read **Terms & Condition**, and tick box.
5. Jika sudah sesuai, klik **Next**.
Once OK, click **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.

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)	Enter	Enter	+62	Enter	☐

Only alphabetical, numeric, underscore dash are allowed

3 Authorised Person Details *

Use Primary Contact Information	Name (as per KTP or Passport)	KTP or Passport Number	Designation	Mobile Number	Email Address
☐	OCTA	3174567721122222	authorised person	+6281254211455	octa@mail.com

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

5 Next

Untuk *User* yang memilih **OCTO Biz Lite**, sistem akan menampilkan halaman **Langkah 3: Add Account & Users**
 For *User* that choose **OCTO Biz Basic**, system will show the **Langkah 3: Add Account & Users** page

- 1** Pilih **All Account** (untuk memilih **seluruh akun**) atau **Select Individual Account** (untuk memilih **beberapa akun**)
 Choose **All Account** (to select all Account) or **Select Individual Account** (to choose several account)
- 2** Lengkapi seluruh **informasi user** (*Single Access User*) dan pilih **Authorised Person**
 Complete **all User Information** (*Single Access User*) and choose **Authorised Person**
- 3** Sistem akan secara **otomatis** menambahkan **list Authorised person**
 System will automatically add the **Authorised Person List**
- 4** Baca **syarat dan ketentuan** yang berlaku, lalu **cek box Read Terms & Condition**, and tick box
- 5** Jika sudah sesuai, klik **Next**
 Once OK, click **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***** NW***** TV***** WU***** QR***** MP***** SW***** 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
AGEN JASA TEKNOLOGI HUKUM TERKINI 71 KUNAWA*****

Account Number
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	+6281865431112	sysadmin1@mail.com	No
System Administrator 2 (Approver)	SYSDADMIN2	admin2	+6281987653122	sysadmin2@mail.com	No
Maker	MAKER01	OCTA	+62813543211455	octa@mail.com	Yes
Approver	APPROB1	OCTI	+6281778909876	octa@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

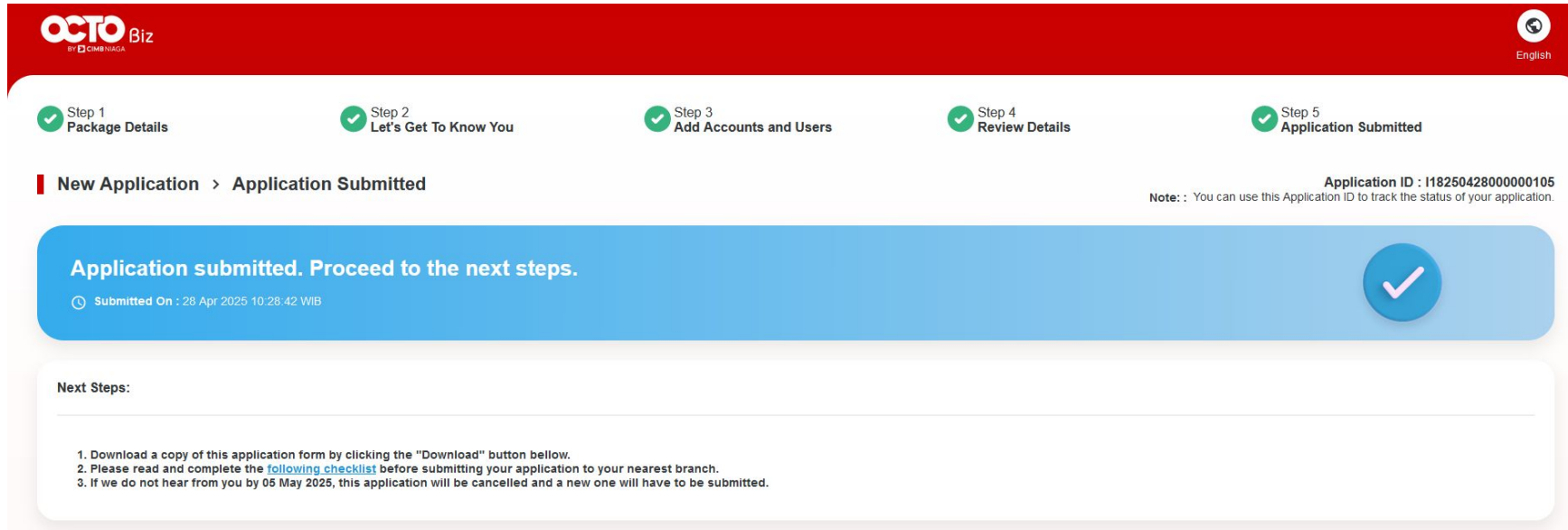
Back

1

Submit

Sistem akan menampilkan
Langkah 4: “Review Details”
System will show the **Langkah 4:**
“Review Details” page

- 1 Periksa seluruh detail akun. Jika sudah sesuai, klik **Submit**
Check all details. Once ok, click 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:

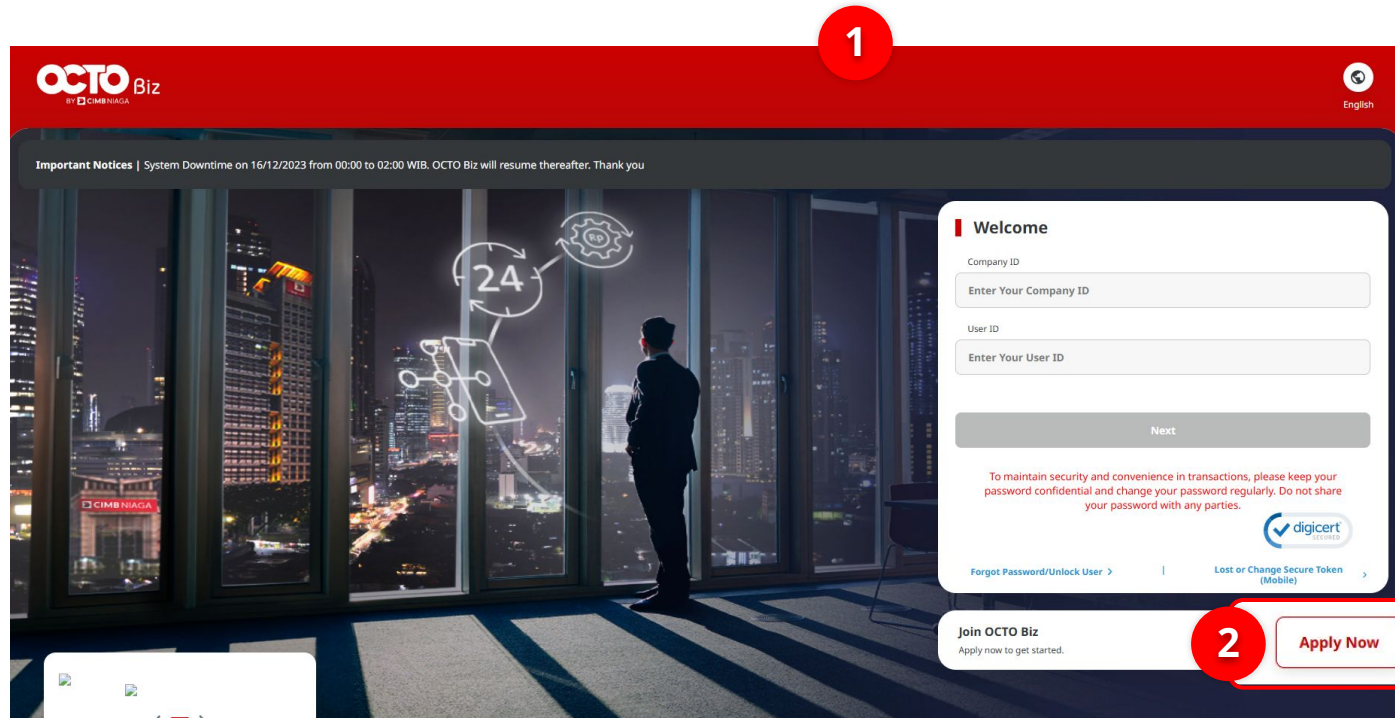
1. Download a copy of this application form by clicking the "Download" button bellow.
2. Please read and complete the [following checklist](#) before submitting your application to your nearest branch.
3. If we do not hear from you by 05 May 2025, this application will be cancelled and a new one will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

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

*Once SUccceed, system will show the **Langkah 5: "Application Submitted"** page*

Hybrid Onboarding

Check Application Status

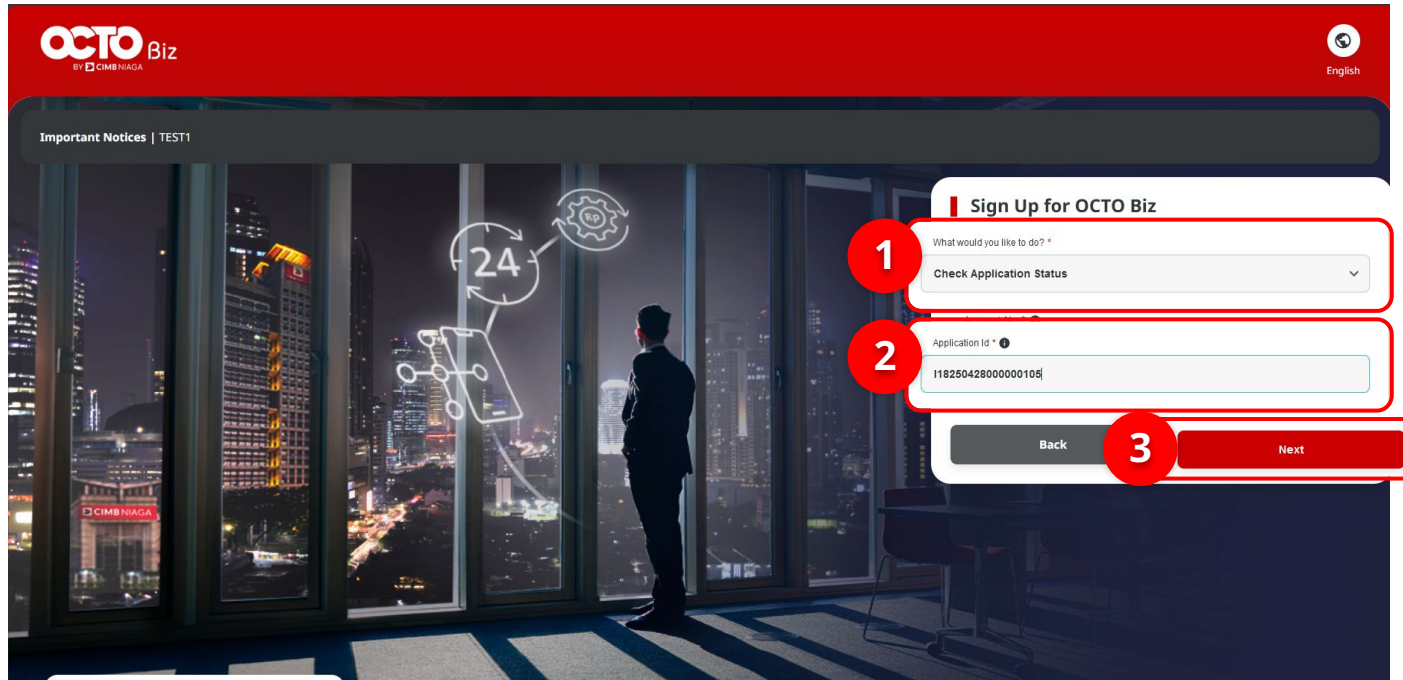


- 1 Kunjungi Website OCTO Biz di: www.octobiz.co.id

Visit OCTO Biz on:
www.octobiz.co.id

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

Click ***Apply Now***

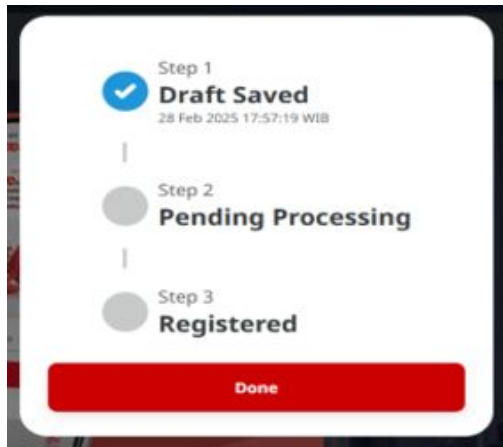


Sistem akan memunculkan **Pop Up Box Sign Up for OCTO Biz**

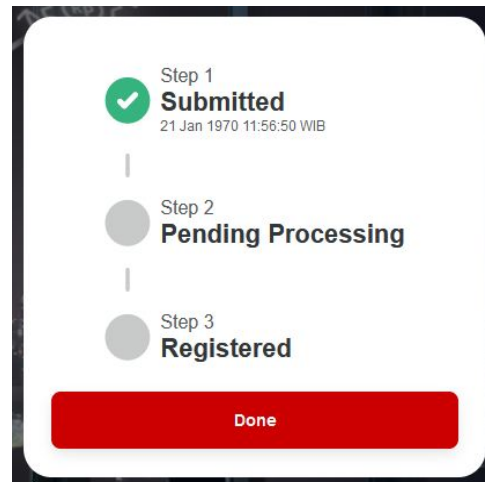
System will show the **Sign Up for OCTO Biz Pop up Box**

- 1** Pilih **Check Application Status**
*Choose **Check Application Status***
- 2** Masukkan **Application ID** yang terdaftar
*Input the **Application ID***
- 3** Jika sudah sesuai, Klik **Next**
*Once OK, click **Next***

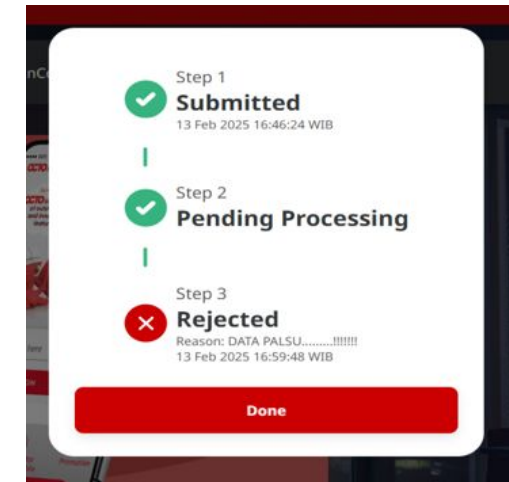
Status Dalam Proses Pengisian
Draft Status



Data berhasil di Submit
Data Is successfully submitted



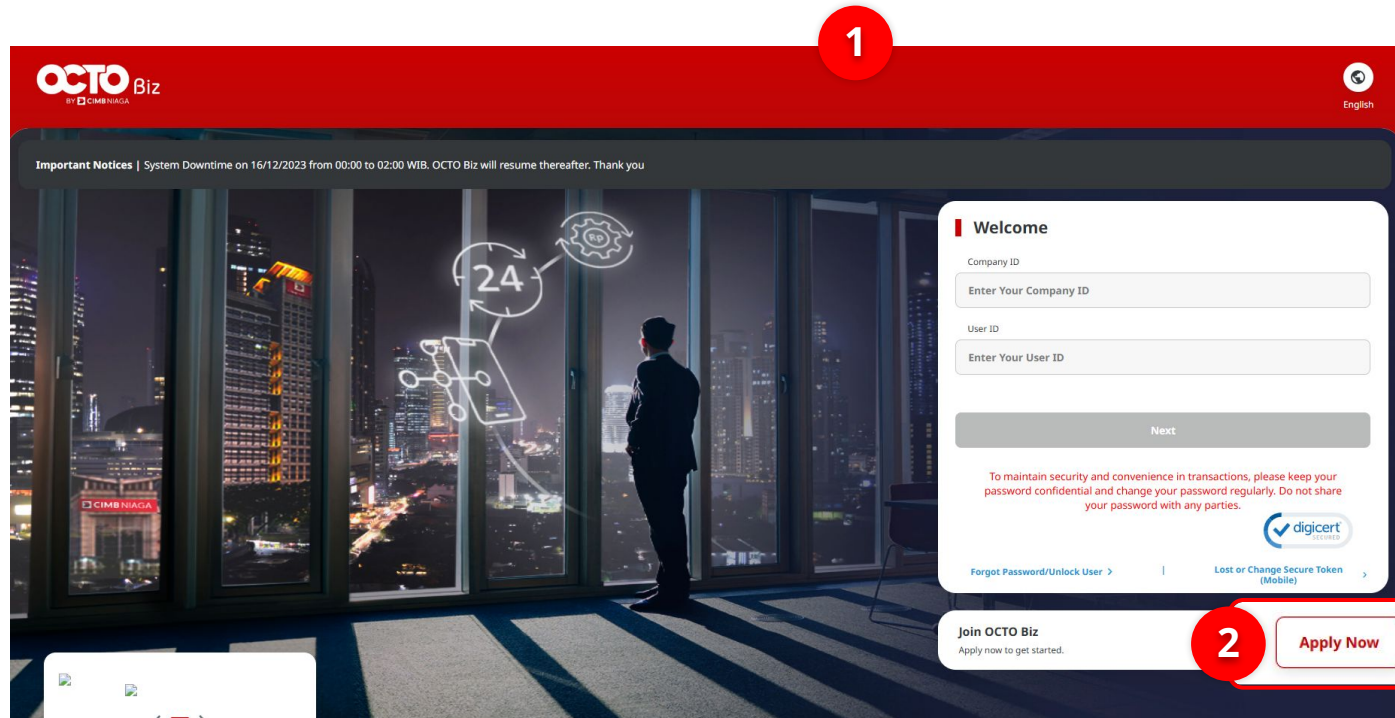
Status saat Sudah di Verifikasi Bank
Data is Verified by Bank



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

Hybrid Onboarding

Retrieve Draft Application

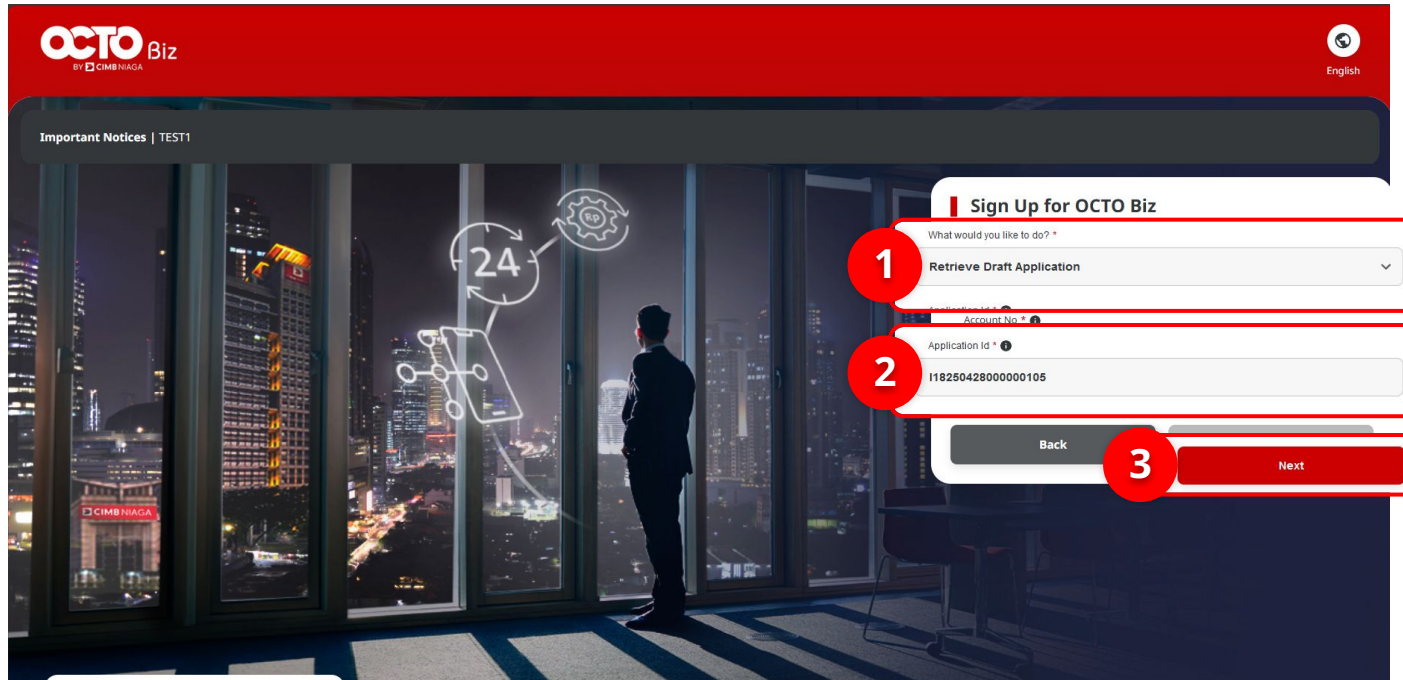


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Visit OCTO Biz on:
www.octobiz.co.id

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

Click **Apply Now**



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

System will show the **Sign Up for OCTO Biz Pop up Box**

- 1** Pilih **Retrieve Draft Application**
Choose Retrieve Draft Application
- 2** Masukkan **Application ID** yang terdaftar
Input the Application ID
- 3** Jika sudah sesuai, Klik **Next**
Once OK, click Next

Notifikasi Onboarding pada Email

1. Notifikasi saat sudah berhasil melakukan submit pada Website
Notification when you have successfully submitted to Website
Subject Email : **OCTO Biz – Hybrid Registration Form**
2. Notifikasi saat proses *save as draft* atau *system time out*
Notification when the save as draft process or 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
Notification when the customer has not brought the mandatory documents to the nearest branch, and the system will send a 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
Notification when the customer has not continued the application which is still in Draft status and the application will expire according to the Bank User parameters that have been determined and the system will send a 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
Notification when the customer has not brought the mandatory documents to the nearest branch and the application will expire according to the specified Bank User parameters and the system will send a reminder.
Subject Email : **OCTO Biz – Please come to branch before its expired**



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