

The OCTO Biz logo is prominently displayed in the center-right. 'OCTO' is in a large, bold, white, rounded sans-serif font, and 'Biz' is in a smaller, white, sans-serif font to its right.

Transaction

Manage Beneficiary Foreign Transfer

Mobile

TUTORIALOCTOBIZ2025

KEJAR MIMPI

Transaction

Manage Beneficiary Foreign Transfer

Transaction - Manage Beneficiary Foreign Transfer Fungsi ini digunakan untuk mengelola (membuat, mengedit, menghapus) **Favorite Beneficiary**

*Transaction - Manage Beneficiary Foreign Transfer is used to manage (create, edit, and delete) the **favorite beneficiary***

03

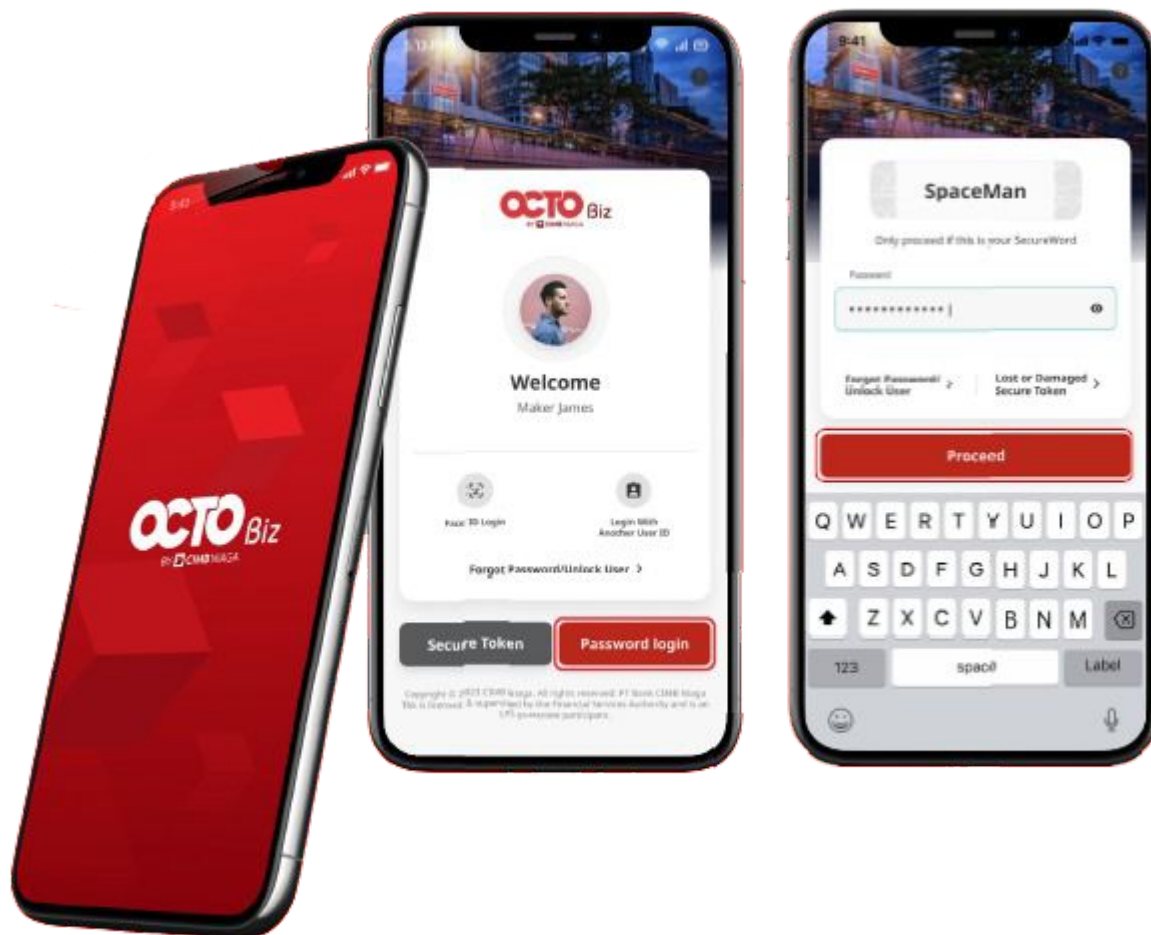
Create
Transaction

09

Approve
Transaction

Manage Beneficiary Foreign Transfer

Create Transaction



Login sebagai **Maker**

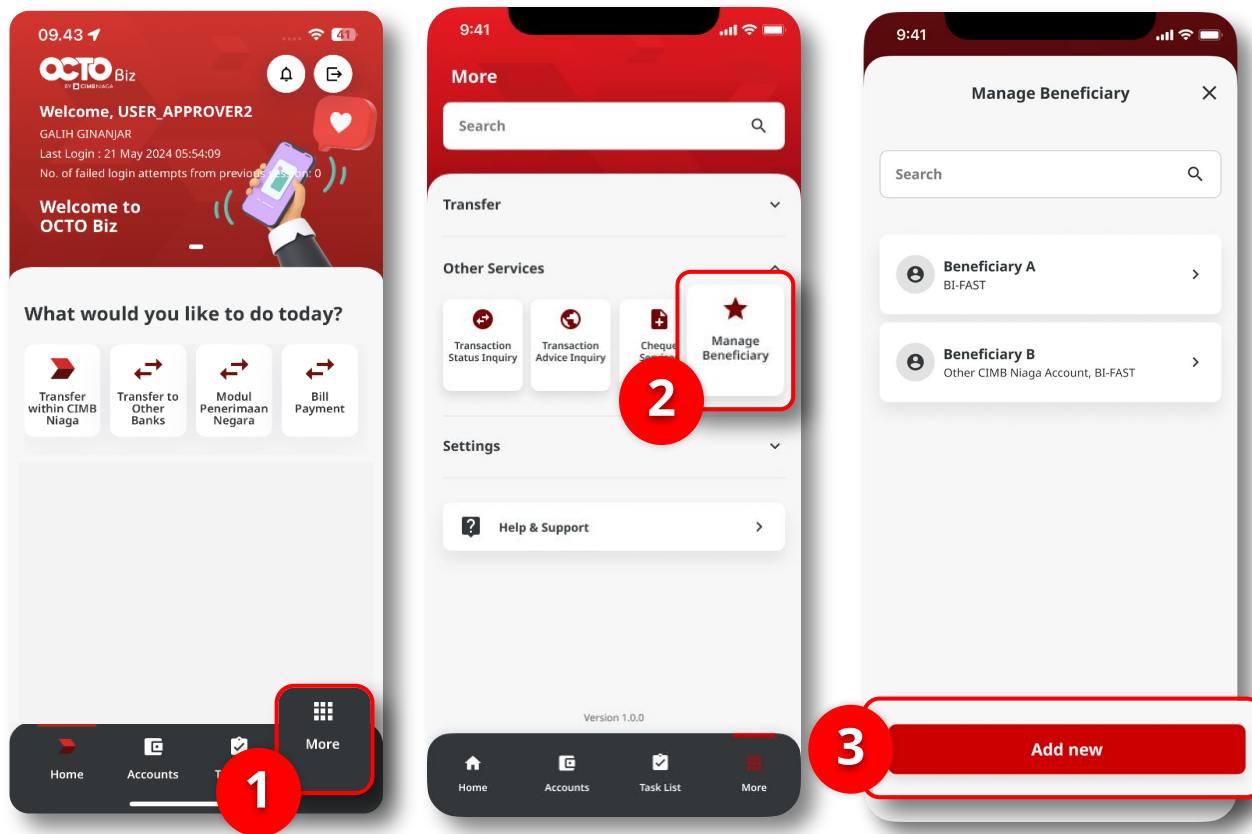
Login as **Maker**

1 Isi **Password**

Input **Password**

2 Klik **Proceed**

Click **Proceed**



1 Klik Menu **More**

*Click **More** Menu*

2 Klik **Manage Beneficiary**

*Click **Manage Beneficiary***

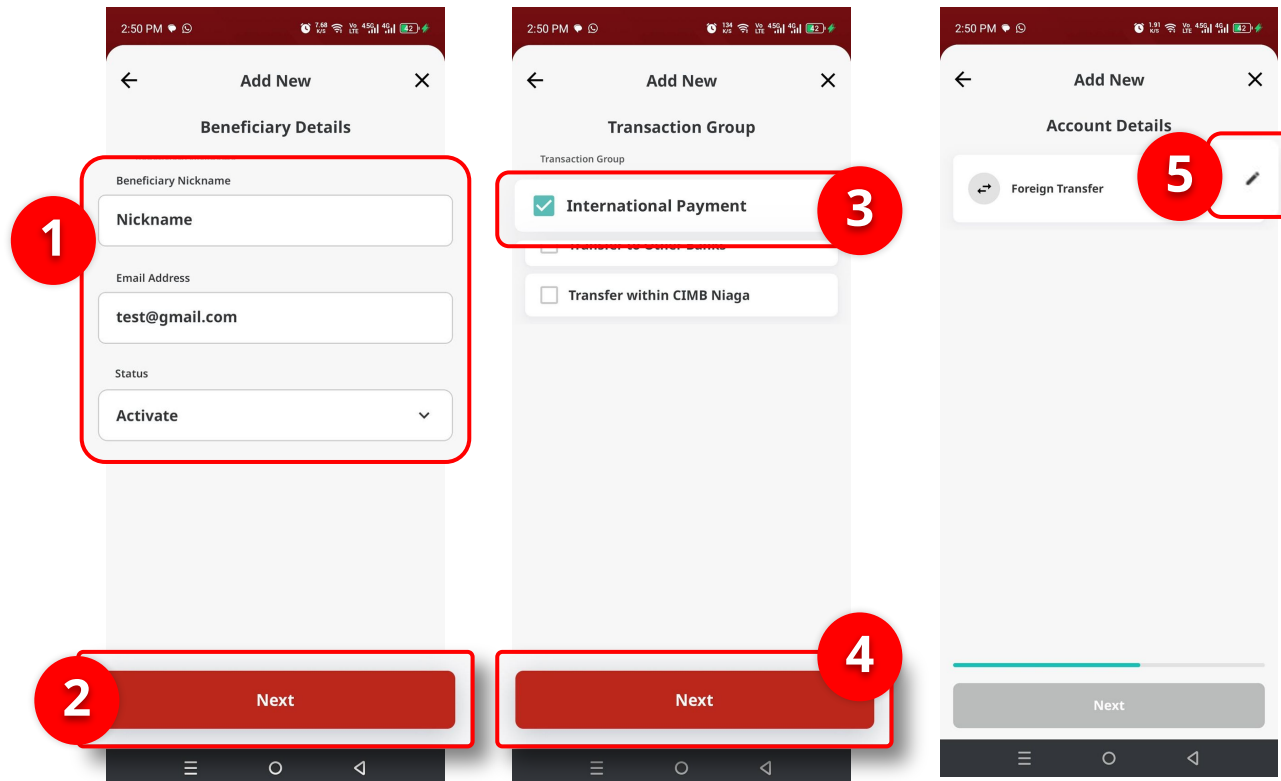
3 Sistem akan menampilkan halaman **Manage Beneficiary**, Klik **Add New**

*System will show the **Manage Beneficiary** page, Click **Add New***

LANGKAH

03

MAKER



1 Lengkapi **Beneficiary Details**

*Complete the **Beneficiary Details***

2 Klik **Next**

*Click **Next***

3 Pilih **International Payment** sebagai **Transaction Group**

*Choose **International Payment** as **Transaction Group***

4 Klik **Next**

*Click **Next***

5 Klik ikon **Edit**

*Click **Edit***

LANGKAH

04

MAKER

The screenshots illustrate the process of creating a foreign transfer transaction in the OCTO Biz app. The first screen shows the 'Foreign Transfer' form with fields for Beneficiary Account No., Beneficiary Address Line 1, Beneficiary Name, and Beneficiary Phone No. (Optional). The second screen shows the 'Foreign Transfer' form with fields for Beneficiary Bank Information, SWIFT Code, Beneficiary Bank Name, and Beneficiary Bank Address Line 1, 2, and 3. The third screen shows the 'Add New' screen with the 'Foreign Transfer' details and a 'Next' button.

1 Klik **Add**

Click **Add**

2 Klik **Next**

Click **Next**

3 Pilih **Beneficiary Banks Information**, dan Masukan **SWIFT Code**

Choose **Beneficiary Banks Information**, and input the **SWIFT Code**

4 Klik **Next**

Click **Next**

5 Sistem akan menampilkan **Update Account Details**

System will show the **Update Account Details**

6 Klik **Next**

Click **Next**

Confirmation

Beneficiary Nickname Nickname

Email Address test@gmail.com

Transaction Group International Payment

Foreign Transfer

Beneficiary Details

Beneficiary Account No. 1234567890

Beneficiary Address Line 1 Jakarta

Beneficiary Address Line 2 (Optional) -

Beneficiary Address Line 3 (Optional) -

Beneficiary Name Nama

Beneficiary Phone No. (Optional) -

Beneficiary Bank Details

Beneficiary Bank Information Bank List

SWIFT Code AAABBBCCCXX

Beneficiary Bank Name BANK TEST 001

Beneficiary Bank Address Line 1 ALAMAT001

Save as Draft **1** Submit

Submitted for approval

Reference No. I03250723000001810

Beneficiary Nickname Nickname

Email Address test@gmail.com

Transaction Group International Payment

Foreign Transfer

Beneficiary Details

Beneficiary Account No. 1234567890

Beneficiary Address Line 1 Jakarta

Beneficiary Address Line 2 (Optional) -

Beneficiary Address Line 3 (Optional) -

Beneficiary Name Nama

Beneficiary Phone No. (Optional) -

Done **2**

- 1 Sistem akan menampilkan **halaman Confirmation**, Klik **Submit**

*System will show the **Confirmation** page, click **Submit***

- 2 Jika berhasil, sistem akan mengarahkan ke halaman **Submitted for Approval**, Klik **Done**

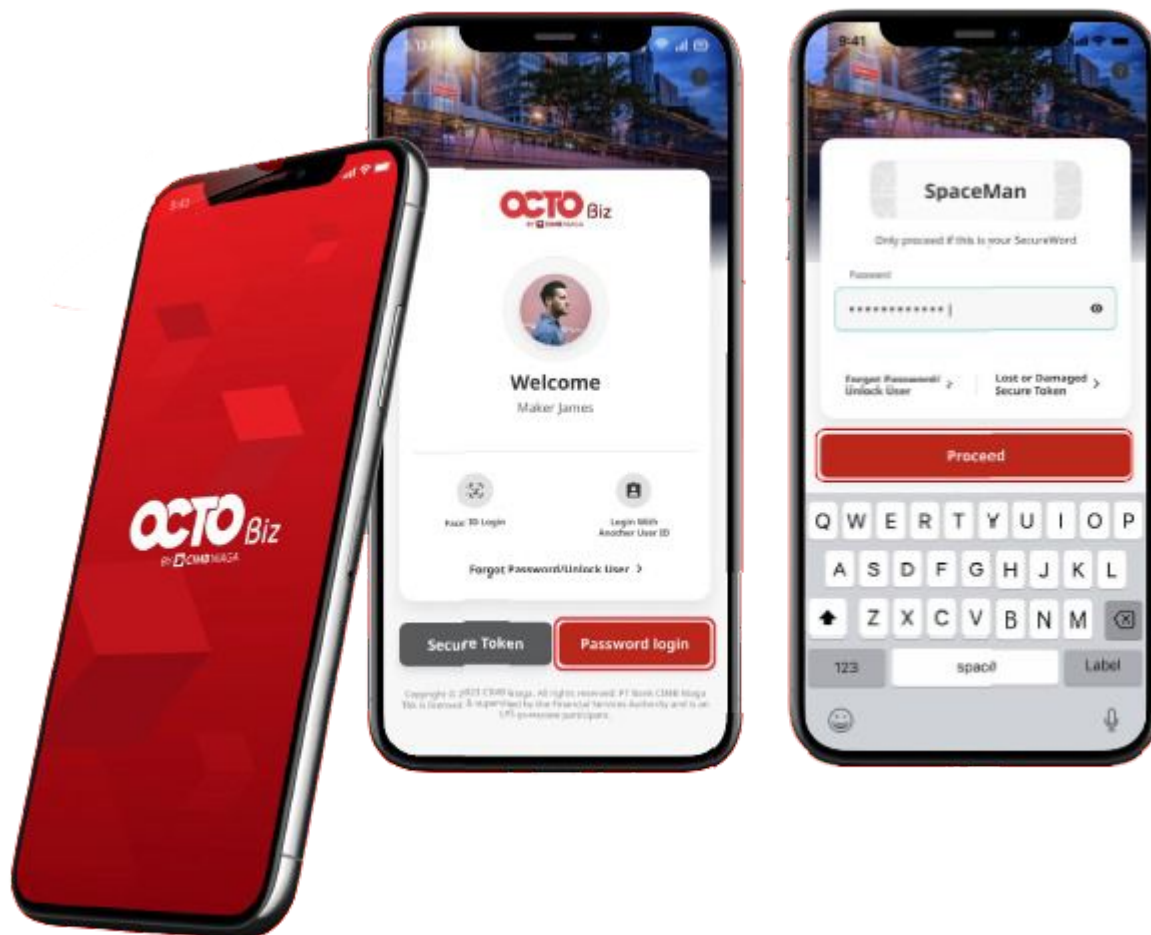
*Once succeed, system will show the **Submitted for Approval** page, click **Done***

Manage Beneficiary Foreign Transfer

Approval Process

Approval Process pada kegiatan **Non-Transaksional** seperti **Add, Edit, dan Delete**

*Approval Process for **Non-Transactional process** such as **Add, Edit, and Delete***



Login sebagai **Approver**

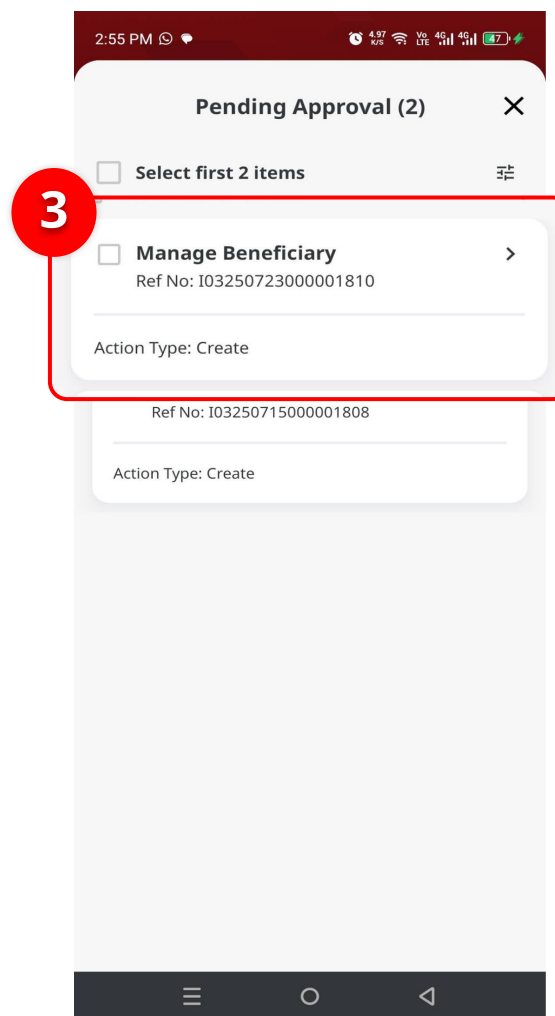
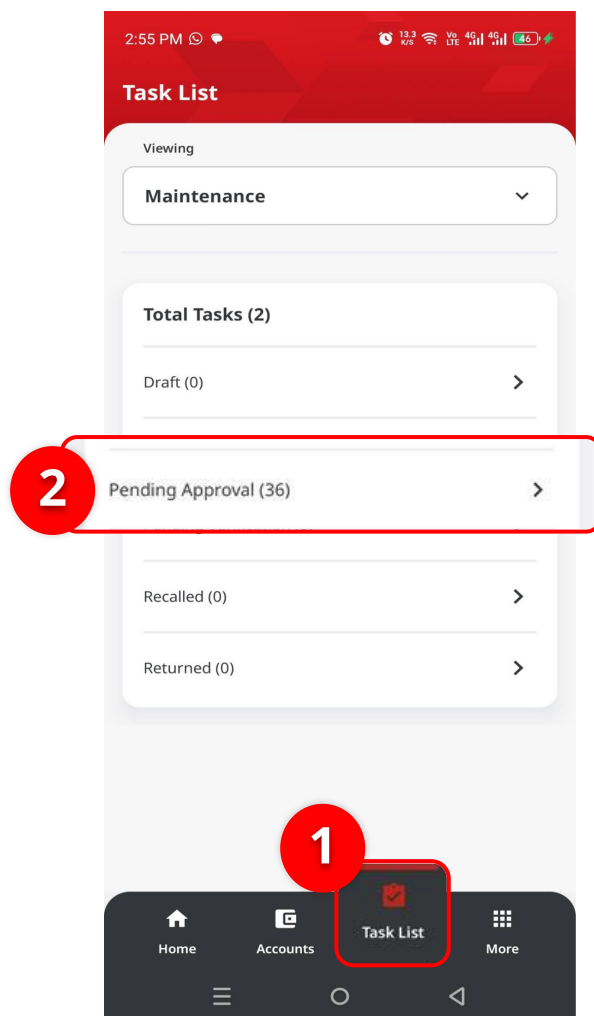
Login as Approver

1 Isi **Password**

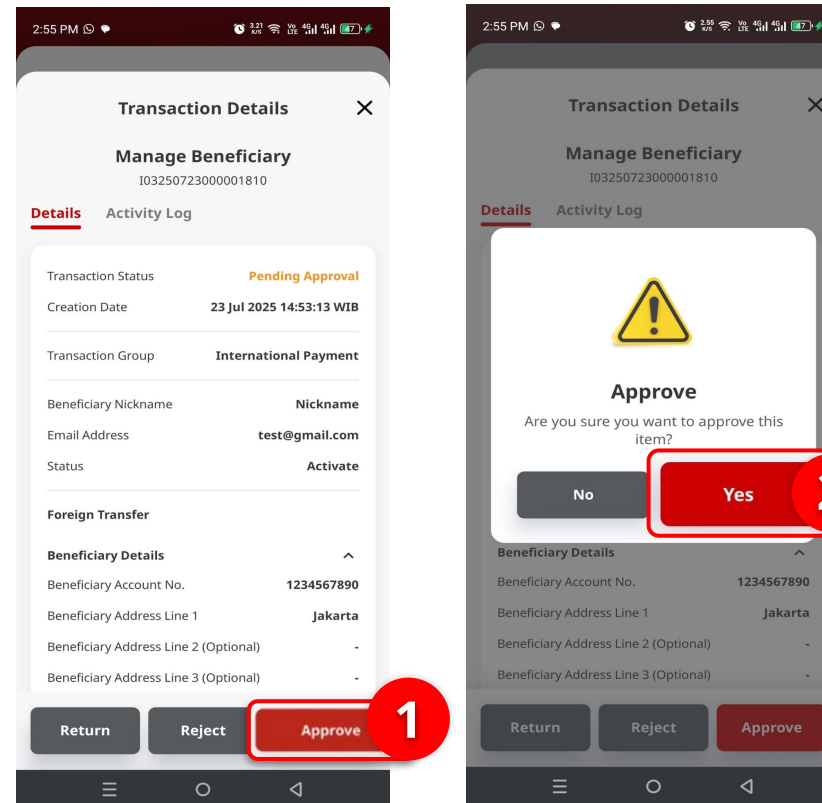
Input Password

2 Klik **Proceed**

Click Proceed



- 1 Arahkan pada menu dibawah, **klik Task List**
*Navigate to **Task List** menu*
- 2 Pilih **Pending Approval**
*Choose **Pending Approval***
- 3 Pilih item yang akan di **Approve**
Choose item

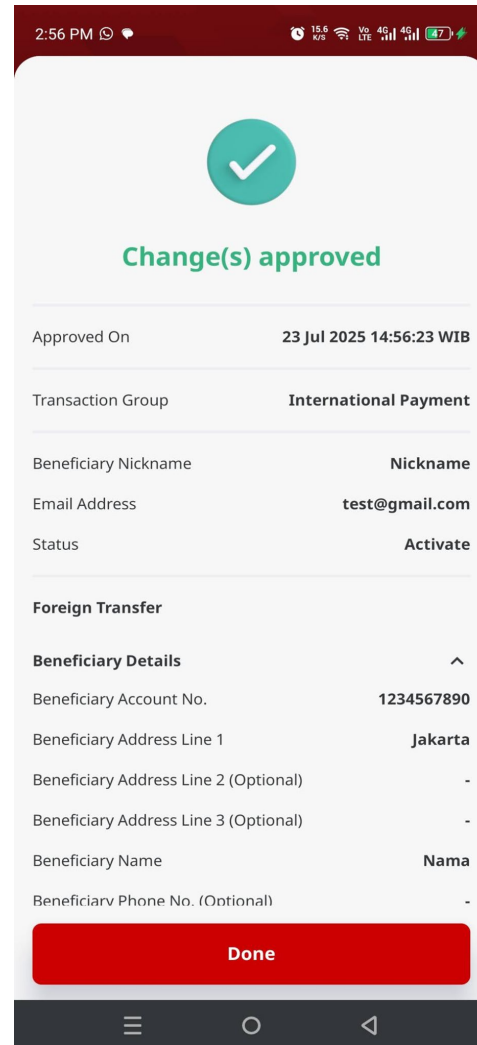


- 1 Tinjau Ulang transaksi, lalu Klik **Approve**

Review transaction, click Approve

- 2 Sistem akan menampilkan **Pop-Up Approve**, Klik **Yes**

System will show the Approve pop-up, click Yes



Jika transaksi Berhasil, sistem akan menampilkan **halaman Acknowledgement**

*Once succeed, system will show the **acknowledgement page***



OCTO Biz
BY  **CIMB NIAGA**

