

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

Transaction

Manage Beneficiary Foreign Transfer

Website

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

14

Approve
Transaction

Manage Beneficiary Foreign Transfer

Create Transaction

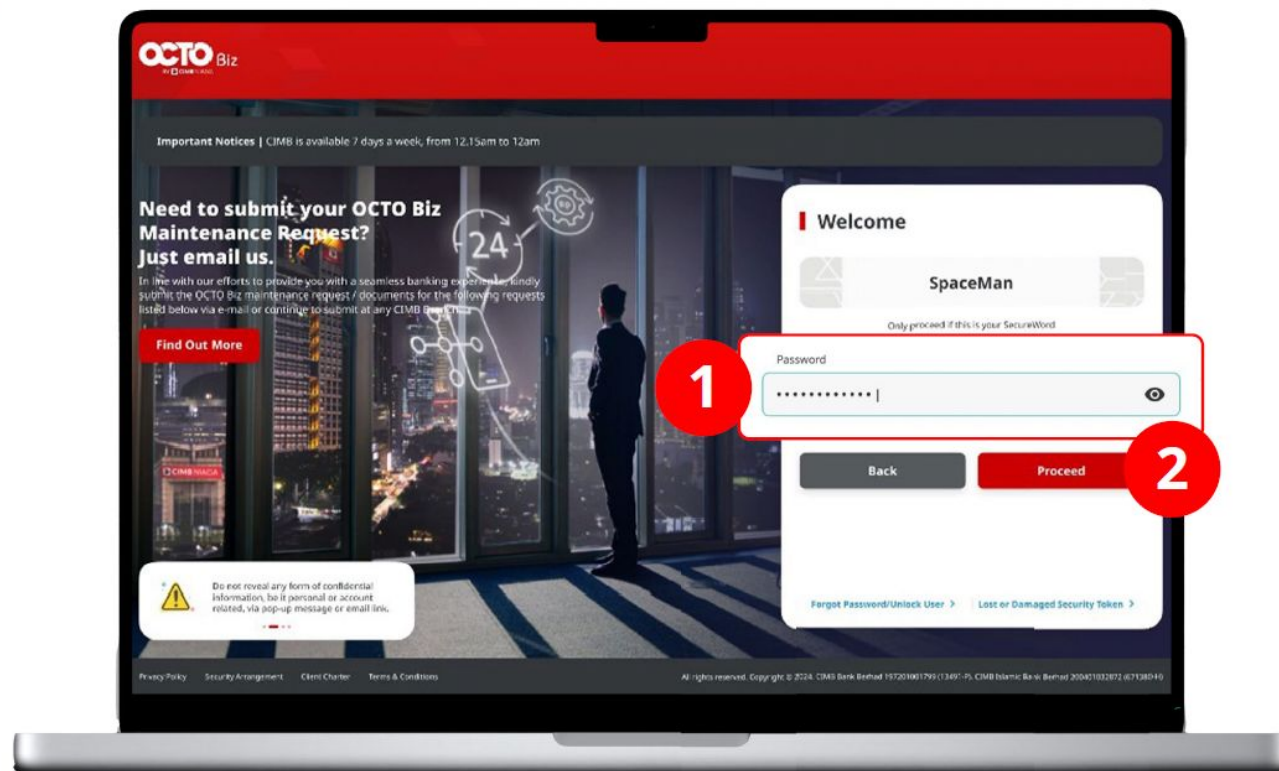


- 1 **Maker** Masuk dengan menggunakan **User & Company ID**

*Maker login using **User & Company ID***

- 2 Klik **Next**

*Click **Next***

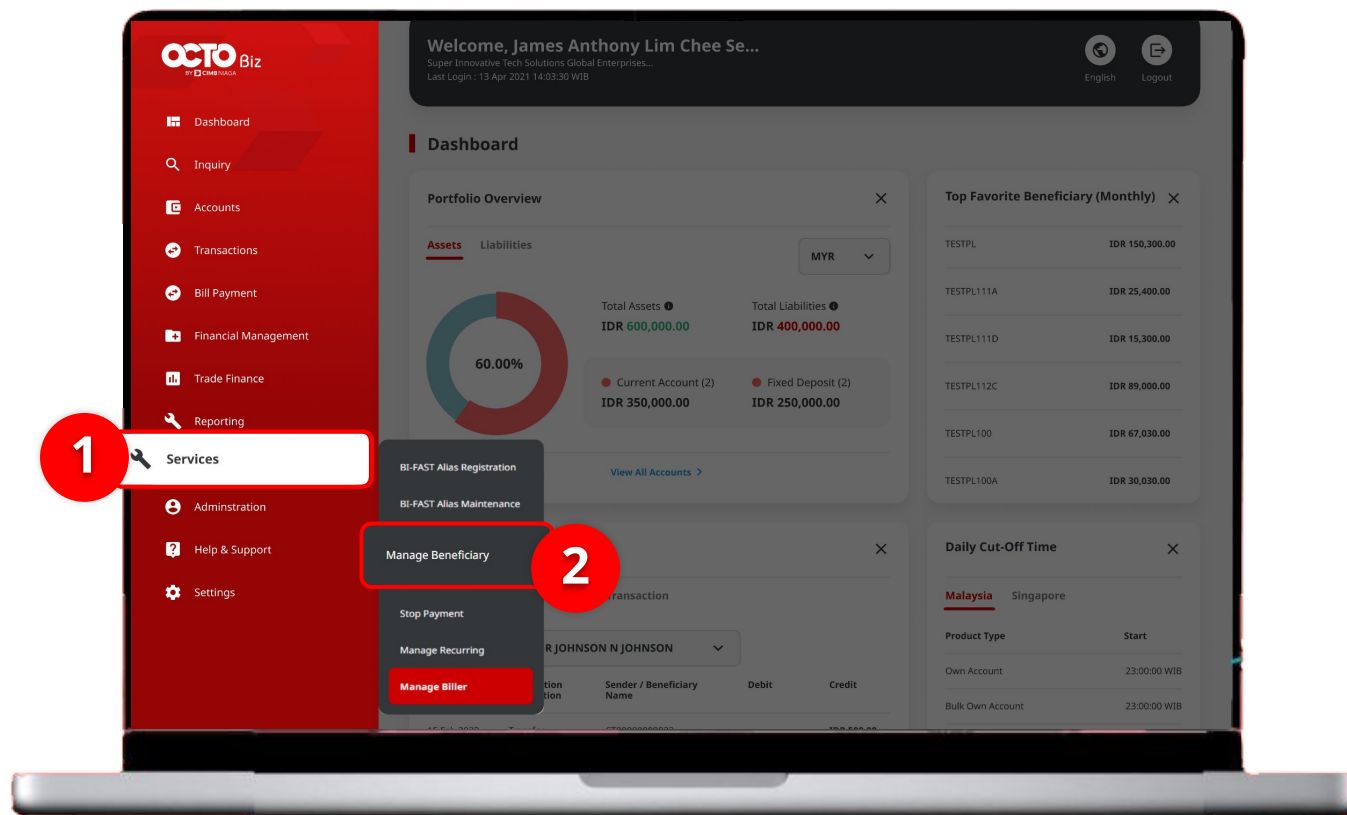


1 Isi **Password**

Input **Password**

2 Klik **Proceed**

Click **Proceed**



Sistem akan menampilkan halaman ***Dashboard***

*System will show the **Dashboard** page*

1 Arahkan **Kursor ke Services**

*Navigate to **Services***

2 Klik **Manage Beneficiary**

*Click **Manage Beneficiary***

Manage Beneficiary > Inquiry and Listing

Search

Beneficiary Nickname

Enter

Beneficiary Name

Enter

Transaction Group

Select

Search

Listing

	Beneficiary Nickname	Beneficiary Name	Transaction Group	Transaction Type
	No record			

Add

Sistem akan menampilkan halaman **Manage Beneficiary > Inquiry & Listing**

System will show the **Manage Beneficiary > Inquiry & Listing** page

1 Klik **Add**

Click **Add**

LANGKAH

05

MAKER

The screenshot shows a web form titled "Manage Beneficiary > Add". A red box labeled "1" encompasses the top section of the form, which includes input fields for "Beneficiary Nickname *" and "Email Address", both with placeholder text "Enter". Below these is a "Status" dropdown menu currently set to "Activate". A second red box labeled "2" points to a "Transaction Group *" section, which contains a red "Select" button. At the bottom of the form is a "Back" button.

- 1** Lengkapi Bagian **Manage Beneficiary**

*Complete the **Manage Beneficiary** part*

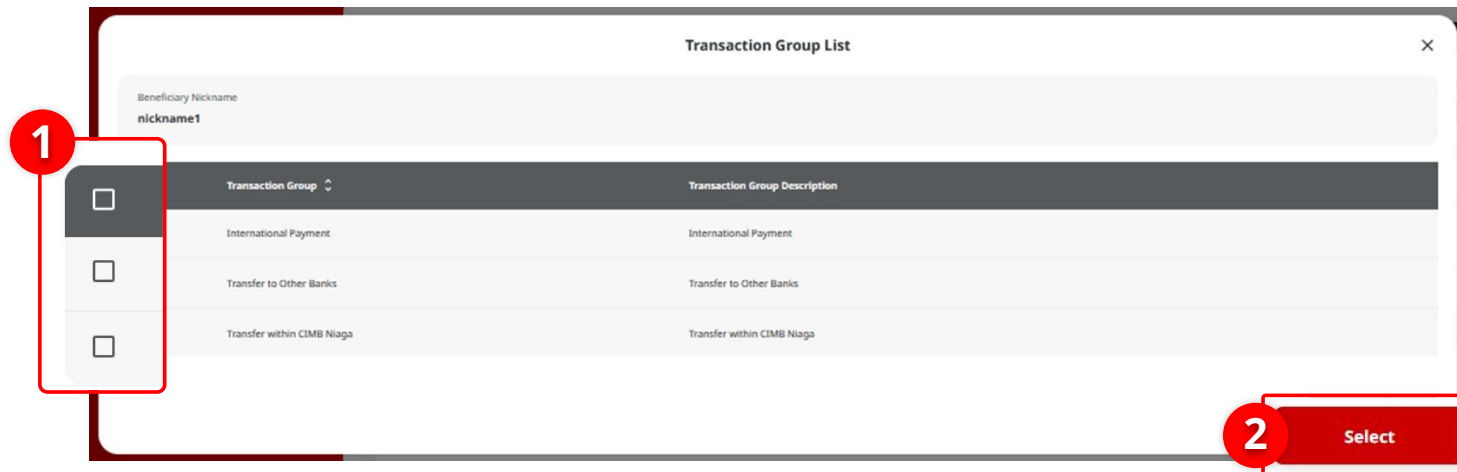
- 2** Klik **Select**

*Click **Select***

LANGKAH

06

MAKER



Sistem akan menampilkan
Pop-Up Transaction Group List

System will show the **transaction Group List Pop-up**

1 Pilih **Transaction Group**
yang berlaku

Choose **Transaction Group**

2 Klik **Select**

Click **Select**

LANGKAH

07

MAKER

Create Transaction | Manage Beneficiary Foreign Transfer

Menu: Service > Manage Beneficiary Foreign Transfer

The screenshot shows the 'Manage Beneficiary > Add' form. It is divided into several sections: 'Manage Beneficiary' (with fields for Nickname, Email Address, Status, and Transaction Group), 'Beneficiary Information' (with fields for Account No., Address, Name, and Phone No.), 'Beneficiary Bank Information' (with a 'Bank List' button and a 'SWIFT Code' field), and 'Beneficiary Bank Address' (with fields for Bank Name, Address, Town/City, Country, and Branch Name). A 'Next' button is at the bottom right. Five red circles with numbers 1 to 5 are overlaid on the form to indicate the steps: 1 points to the 'Foreign Transfer' checkbox, 2 points to the 'Beneficiary Information' section, 3 points to the 'Bank List' button, 4 points to the 'Beneficiary Bank Address' section, and 5 points to the 'Next' button.

1 Manage Beneficiary > Add

Manage Beneficiary

Beneficiary Nickname *
nickname1

Email Address
Enter

Status
Activate

Transaction Group *
Select

Transaction Group
Transaction Group Description
International Payment
International Payment

1 Select Transaction Type *
☒ Foreign Transfer

Beneficiary Information

Beneficiary Information

Beneficiary Account No. *
987654324567

Beneficiary Address *
Jln taman taman
Enter
Enter

2

Beneficiary Name *
name1

Beneficiary Phone No. *
083254463723

3

Beneficiary Bank Information *
Bank List Other

SWIFT Code *
Select

4

Beneficiary Bank Name *
Enter

Beneficiary Bank Address *
Enter
Enter
Enter

Beneficiary Bank Town/City *
Enter

Beneficiary Bank Country *
Enter

Branch Name *
Enter

5 Next

Sistem akan menampilkan kembali halaman **Manage Beneficiary > Add**

System will show the *Manage beneficiary > add* page

- 1 Klik bagian **Foreign Transfer**
Click **Foreign Transfer**
- 2 Lengkapi bagian **Beneficiary Banks**
Complete the **Beneficiary Banks** details
- 3 Pilih **Beneficiary Banks Information** dan masukkan **SWIFT Code**
Choose **Beneficiary banks Information** and input the **SWIFT Code**
- 4 Lengkapi seluruh **Bagian Mandatory**
Complete the **Mandatory Fields**
- 5 Jika sudah sesuai, klik **Next**
Click **Next**

Manage Beneficiary > Add

Manage Beneficiary

Beneficiary Nickname *
nickname1

Email Address
Enter

Status
Activate

Transaction Group *
Select

Transaction Group	Transaction Group Description
International Payment	International Payment

Select Transaction Type *
☒ Foreign Transfer

Beneficiary Information

Beneficiary Information

Foreign Transfer

Beneficiary Details

Beneficiary Account No. *
Enter

Beneficiary Address *
Enter
Enter
Enter

Beneficiary Name *
Enter

Beneficiary Phone No. *
Enter

Beneficiary Bank Details

Beneficiary Bank Information *

Bank List Other

SWIFT Code *
Enter

Back Save as Draft Next

Jika saat proses *input beneficiary* tidak terdapat **bank information**, dapat melakukan **input manual**

*If there's **no Bank Information** part on input process, user can **manually add** bank information*

1 Pilih **Other**

*Choose **Other***

2 Masukan **SWIFT Code** dengan 11 digit angka

*Input **SWIFT Code** with 11-digit numbers*

3 Klik **Next**

*Click **Next***

LANGKAH

09

MAKER

Manage Beneficiary > Review Details

Manage Beneficiary

Beneficiary Nickname

nickname1

Email Address

-

Status

Activate

Transaction Group

Transaction Group Description

International Payment

International Payment

Selected Transaction Type

Foreign Transfer

Yes

Beneficiary Information

Beneficiary Information

Foreign Transfer

Beneficiary Details

Beneficiary Account No.

1234567890

Beneficiary Address

jl jakarta 1

Beneficiary Name

nama1

Beneficiary Phone No.

0218888888

Beneficiary Bank Details

Beneficiary Bank Information

BANK

SWIFT Code

BMRIIDJAXXX

Beneficiary Bank Name

BANK MANDIRI (PERSERO), PT

Beneficiary Bank Address

JL. GATOT SUBROTO KAV 36-38, 12190 JAKARTA

Beneficiary Bank Town/City

JAKARTA

Beneficiary Bank Country

INDONESIA

Branch Name

XXX

Back

1 Submit

Sistem akan menampilkan halaman **Review Details** Tinjau Ulang Transaksi

System will show the Review Details page, review transaction

1 Klik **Submit**

Click Submit

Catatan: Jika saat proses *input beneficiary* tidak terdapat bank information, dapat melakukan input manual dengan:

Pilih Other > Input SWIFT Code dengan 11 digit angka

NOTE: User can manually input the beneficiary bank information using:

Choose Other > Input the SWIFT Code

Manage Beneficiary > Acknowledgement

Submitted for approval

Reference No.: 813250711000004508 Submitted On: 13 Jul 2025 06:07:48 WIB

Manage Beneficiary

Beneficiary Nickname: nickname1 Email Address: -

Status: Active

Transaction Group	Transaction Group Description
International Payment	International Payment

Selected Transaction Type

Foreign Transfer: Yes

Beneficiary Information

Foreign Transfer

Beneficiary Details

Beneficiary Account No.: 1234567890 Beneficiary Address: J Jakarta 1

Beneficiary Name: Nama1 Beneficiary Phone No.: 0218888888

Beneficiary Bank Details

Beneficiary Bank Information: BANK

Beneficiary Bank Name: BANK MANDIRI (PERSERO), PT

Beneficiary Bank Branch: S. GATOT SUBROTO KAW 36-38, 12190 JAKARTA

Beneficiary Bank Town/City: JAKARTA Beneficiary Bank Country: INDONESIA

Branch Name: XXX

User Activities

User	Action	Date / Time	Remark
MANDELA MANDELA	Submit	13 Jul 2025 06:07:47 WIB	-

Print Done

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

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

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***

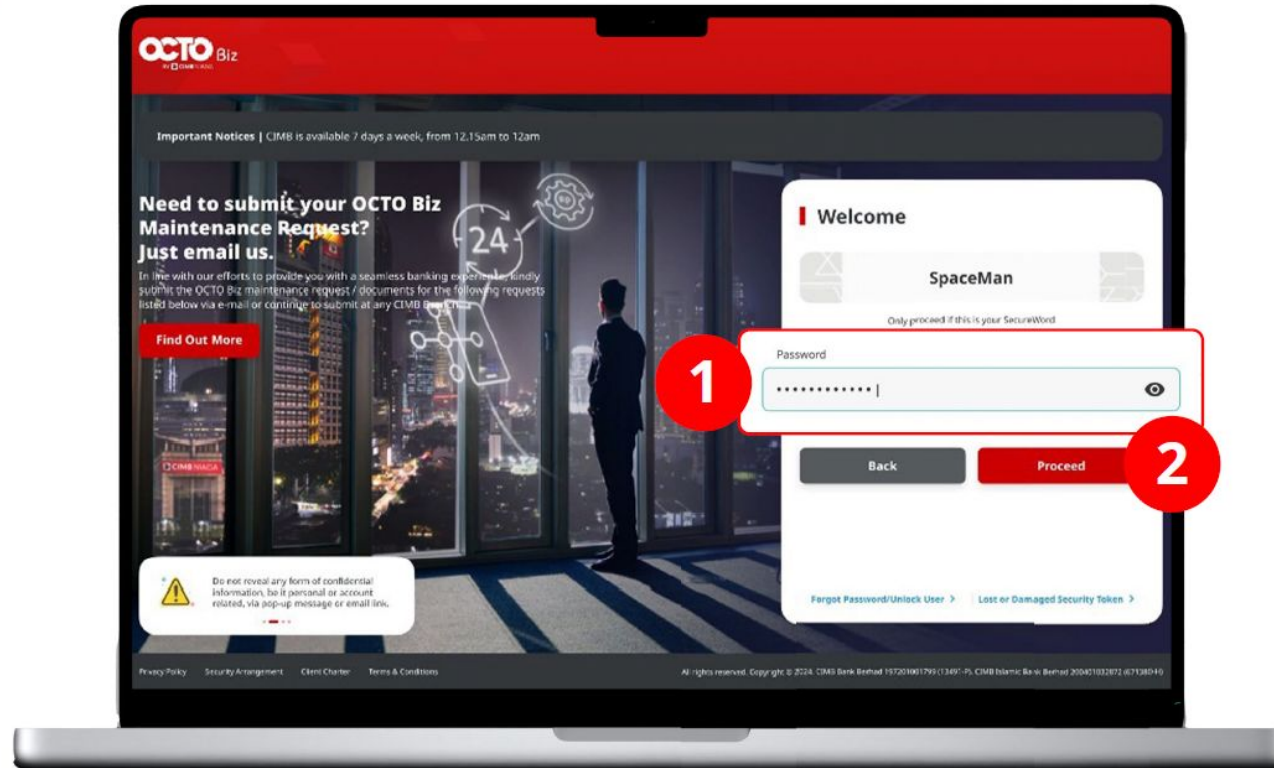


- 1 **Approver** Masuk dengan menggunakan **User & Company ID**

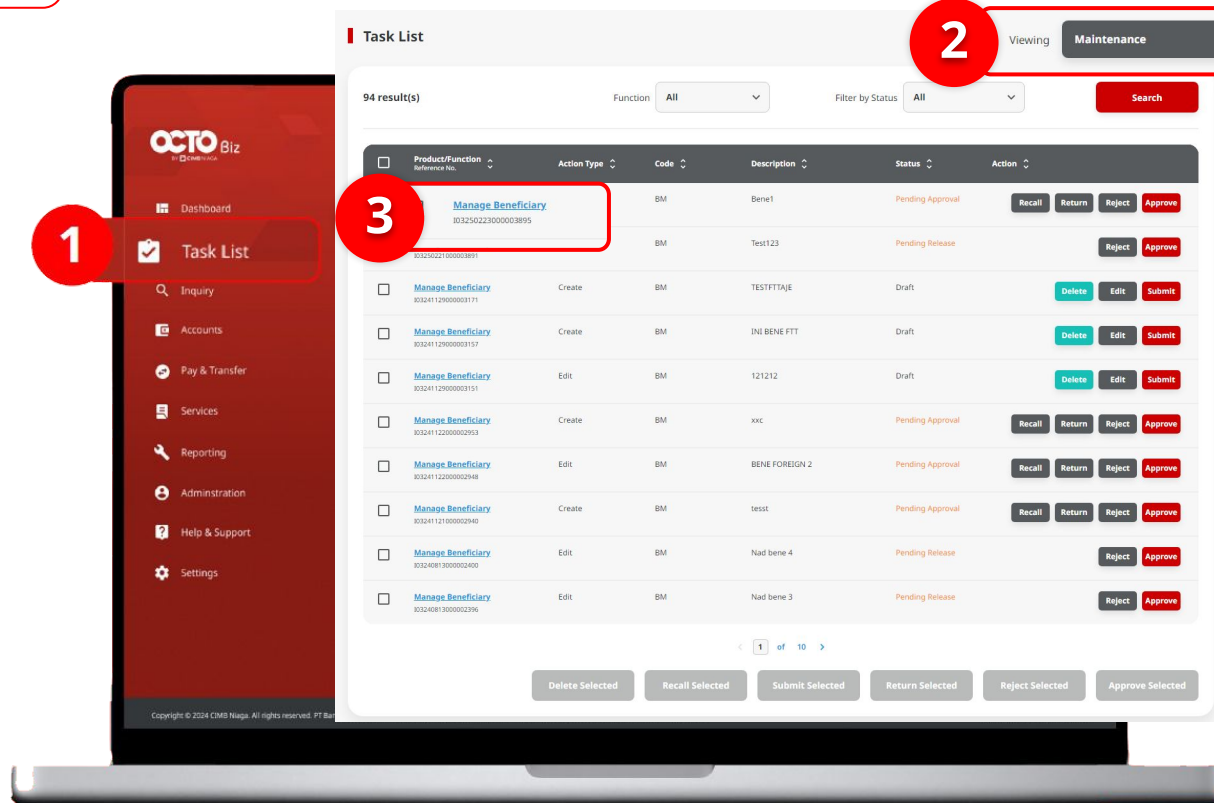
Approver Login using User & Company ID

- 2 Klik **Next**

Click Next



- 1 Isi **Password**
Input Password
- 2 Klik **Proceed**
Click Proceed



Sistem akan menampilkan halaman **Dashboard**

System will show the **Dashboard** page

1 Arahkan **Kursor** ke **Task List**

Navigate to **Task List** menu

2 Pilih **Maintenance** sebagai **Viewing**

Choose **Maintenance** as **Viewing**

3 Klik **Hyperlink** transaksi yang diinginkan

Click **Transaction Hyperlink**

Task List > Details

Transaction Status : Pending Approval

Created Date
15 Jul 2025 06:07:47 WIB

Activity Log

Manage Beneficiary

Beneficiary Nickname
nickname1

Email Address
-

Name
-

Activate

Transaction Group	Transaction Group Description
International Payment	International Payment

Selected Transaction Type

Foreign Transfer
Yes

Beneficiary Information

Beneficiary Information

Foreign Transfer

Beneficiary Details	
Beneficiary Account No. 1234567890	Beneficiary Address Jl Jakarta 1
Beneficiary Name nama1	Beneficiary Phone No. 0218888888

Beneficiary Bank Details	
Beneficiary Bank Information BANK	SWIFT Code BMR220JAXXX
Beneficiary Bank Name BANK MANDIRI (PERSERO), PT	Beneficiary Bank Address Jl. GATOT SUBROTO KAV 36-38, 12190 JAKARTA
Beneficiary Bank Town/City JAKARTA	Beneficiary Bank Country INDONESIA
Branch Name XXX	

User Activities

User	Activities	Date / Time	Remark
MANDIRI, MANDIRI	Submit	15 Jul 2025 06:07:47 WIB	

Remarks

Remarks

Enter

Maximum 100 characters

Back

Return

Approve



Tinjau ulang transaksi yang telah di kirim **Maker,**

Review Transaction

1 Jika sudah sesuai, klik **Approve**

Click Approve

2 Klik **Yes**

Click yes

Task List > Acknowledgement

Change(s) approved

Reference No. : 833250715000004308

Approved On : 18 Jul 2025 17:36:57 WIB

Manage Beneficiary

Beneficiary Nickname

nickname1

Email Address

-

Status

Activate

Transaction Group	Transaction Group Description
International Payment	International Payment

Selected Transaction Type

Foreign Transfer

Yes

Beneficiary Information

Beneficiary Information

Foreign Transfer

Beneficiary Details

Beneficiary Account No.

1234567890

Beneficiary Address

Jl Jakarta 1

Beneficiary Name

nama1

Beneficiary Phone No.

0219888888

Beneficiary Bank Details

Beneficiary Bank Information

BANK

SWIFT Code

BMRJIDJAXXX

Beneficiary Bank Name

BANK MANDIRI (PERSERO), PT

Beneficiary Bank Address

Jl. GATOT SUBROTO KAV 36-38,
12190 JAKARTA

Beneficiary Bank Town/City

JAKARTA

Beneficiary Bank Country

INDONESIA

Branch Name

XXX

User Activities

User	Activities	Date / Time	Remark
MARISA - MARISA	Submit	15 Jul 2025 06:07:47 WIB	-
APPA1 - APPA1	Approve	18 Jul 2025 17:36:56 WIB	-

Print

Done

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

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



OCTO Biz
BY  **CIMB NIAGA**

