

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.

Service

Manage Beneficiary

Mobile

TUTORIALOCTOBIZ2025

KEJAR MIMPI

Service

Manage Beneficiary

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

Transaction - Manage Beneficiary this function is used to manage (create, edit, delete) the **favorite Beneficiary**

03

Create
Transaction

23

Approve
Transaction

Manage Beneficiary

Create Transaction

Add

Modify

Delete

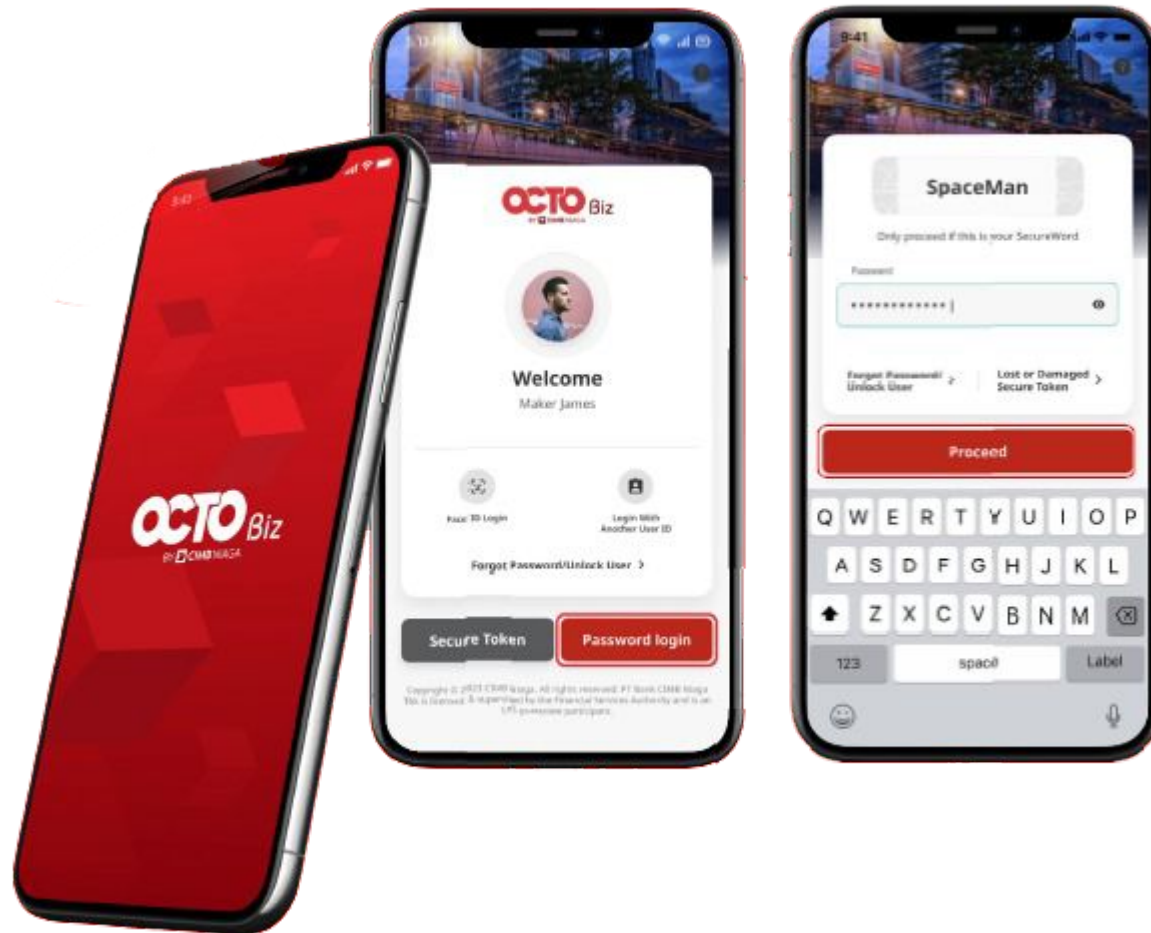
Manage Beneficiary

Create Transaction

Add

Modify

Delete



Login sebagai ***Maker***

*Login as **Maker***

1 Isi ***Password***

*Input **Password***

2 Klik ***Proceed***

*Click **Proceed***

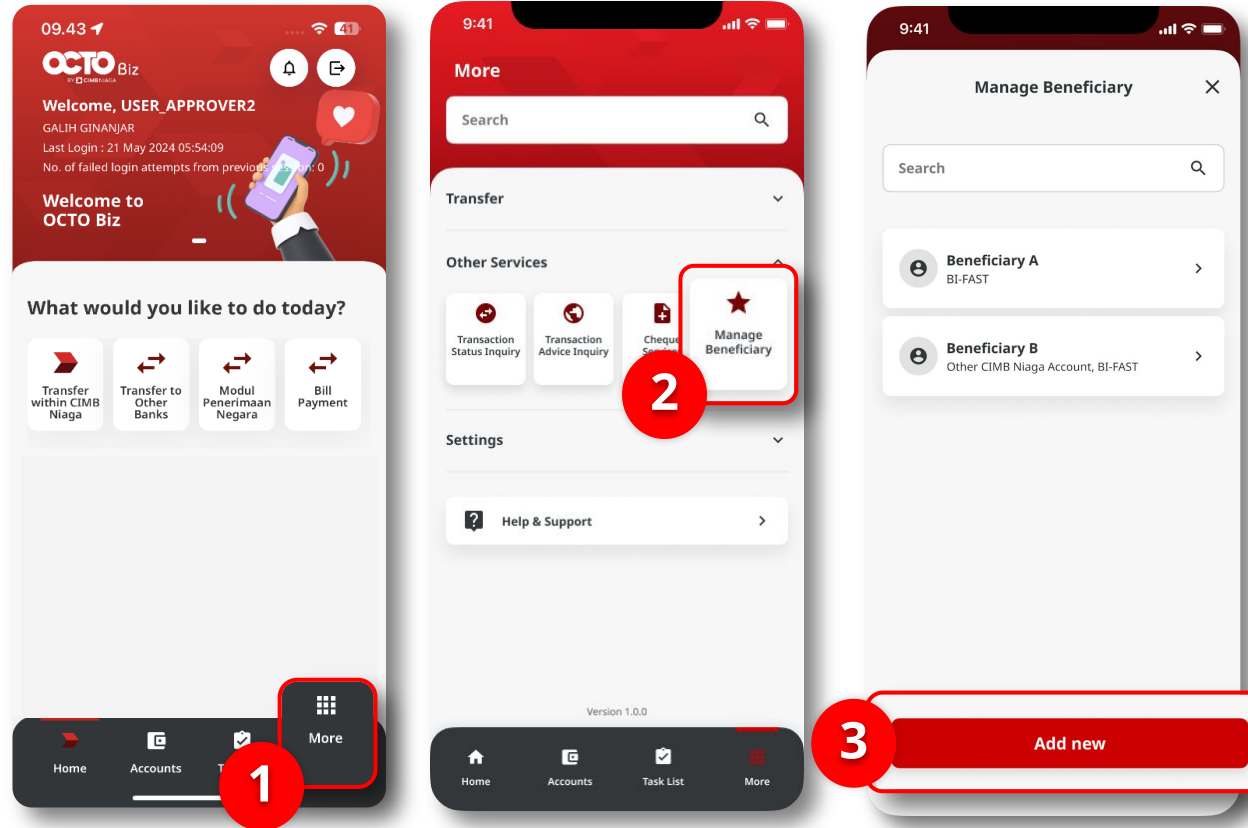
LANGKAH

02

MAKER

Add | Manage Beneficiary

Menu: Service > Manage Beneficiary



1 Klik Menu **More**

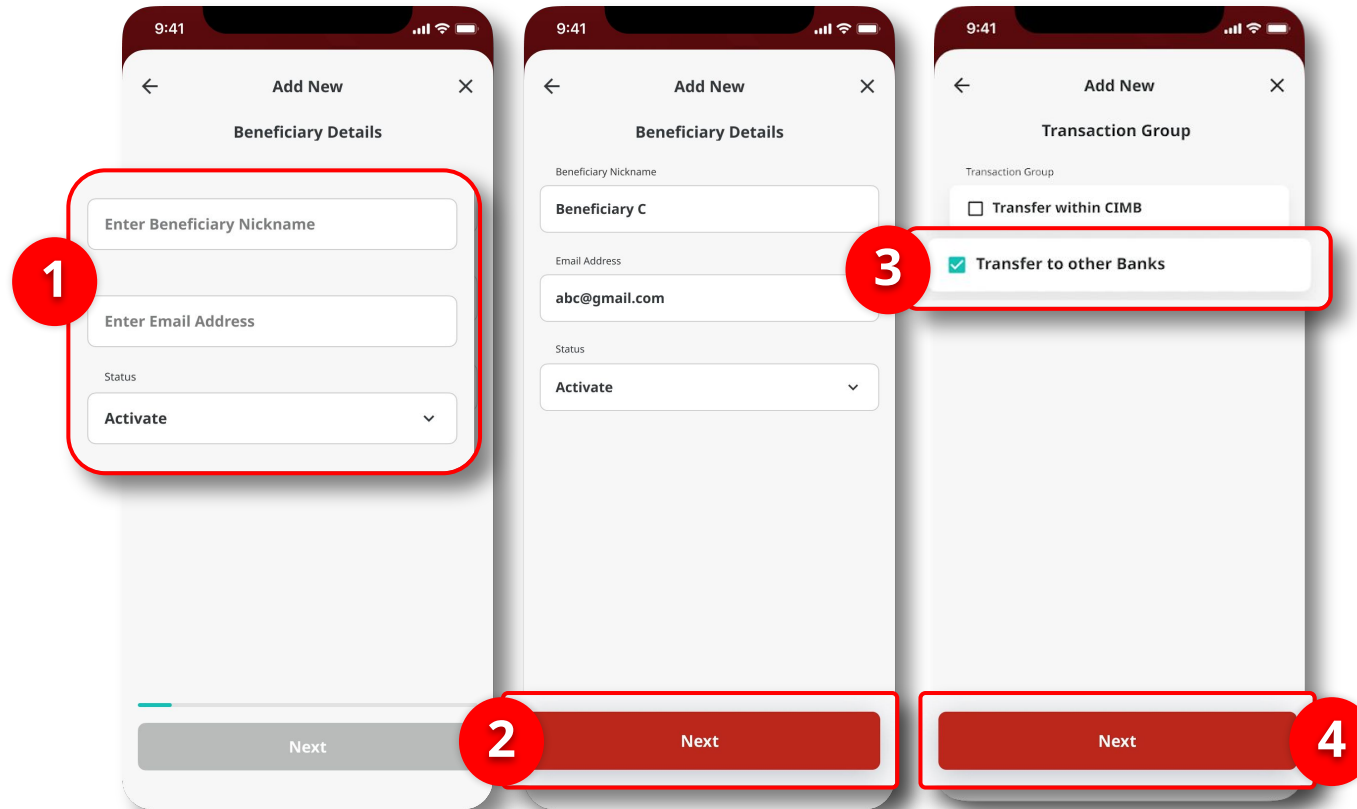
*Click **More** Menu*

2 Klik **Manage Beneficiary**

*Click **Manage Beneficiary***

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

*System will show the **Manage Beneficiary** page, click **Add Now***



1 Lengkapi **Beneficiary Details**

*Complete the **Beneficiary Details***

2 Klik **Next**

*Click **Next***

3 Pilih **Transfer to Other Banks** sebagai **Transaction Group**

*Choose **Transfer to Other Banks** as **Transaction Group***

4 Klik **Next**

*Click **Next***

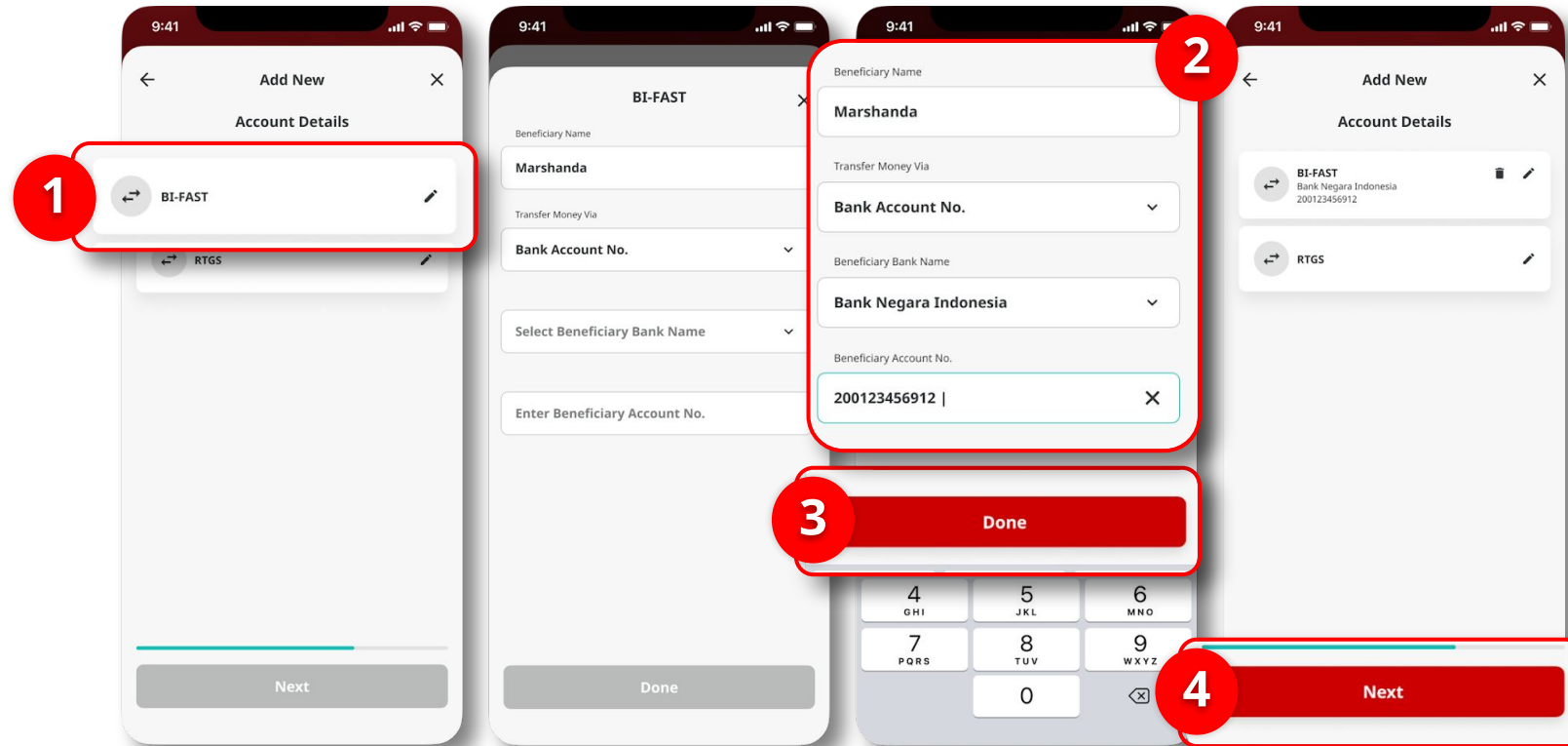
LANGKAH

04

MAKER

Add | Manage Beneficiary

Menu: Service > Manage Beneficiary

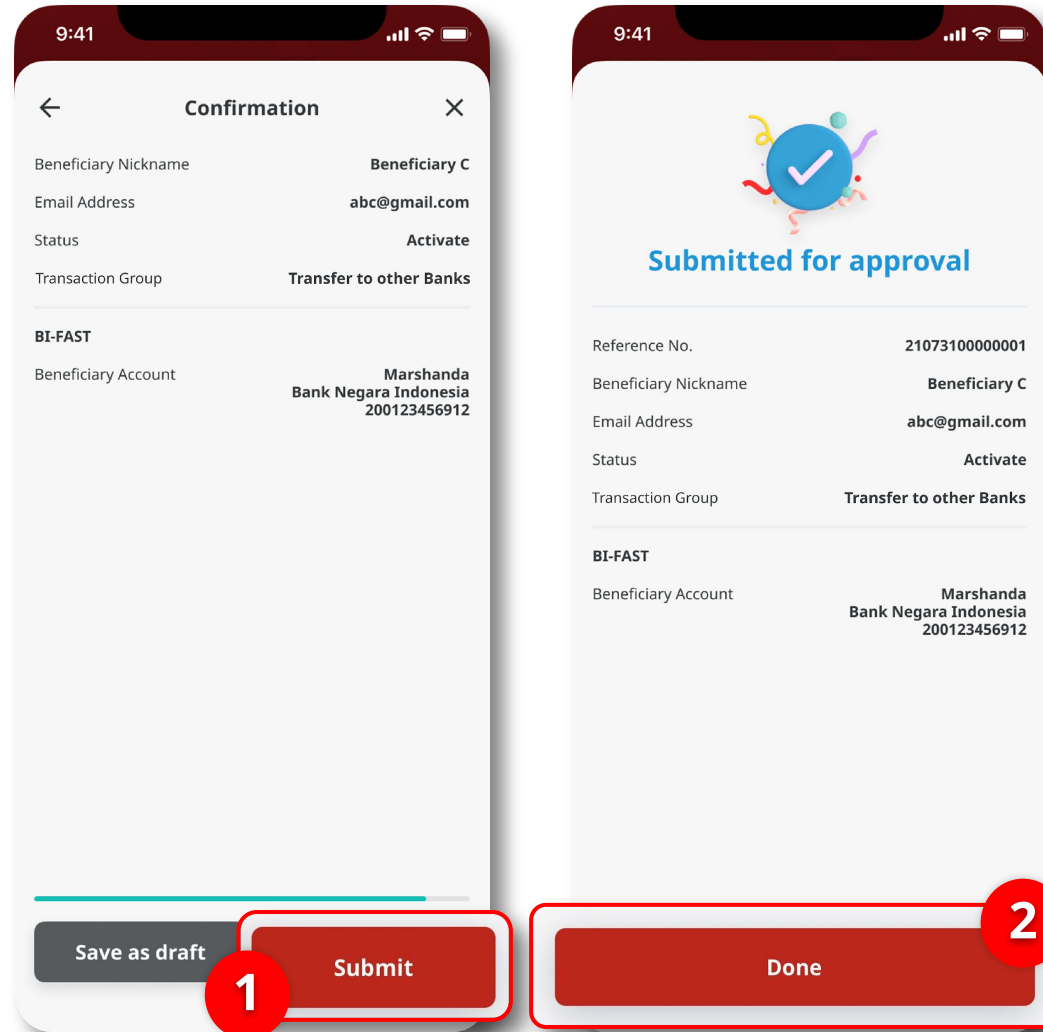


1 Pilih **Account Details**
Choose Account Details

2 Lengkapi **Detail Transaksi**
Complete the Transaction Details

3 Klik **Done**
Click Done

4 Klik **Next**
Click Next



- 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 navigate to Submitted for Approval page. Click Done

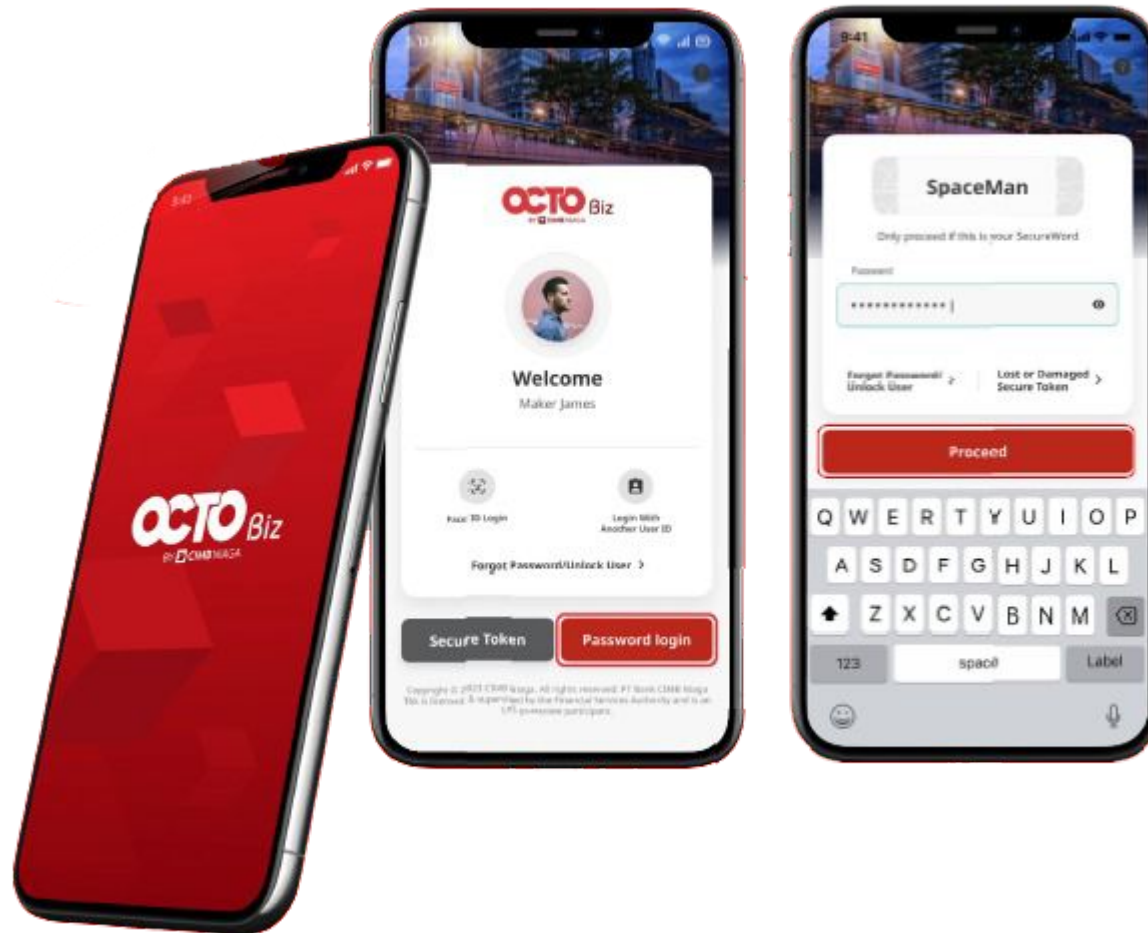
Manage Beneficiary

Create Transaction

Add

Modify

Delete



Login sebagai **Maker**

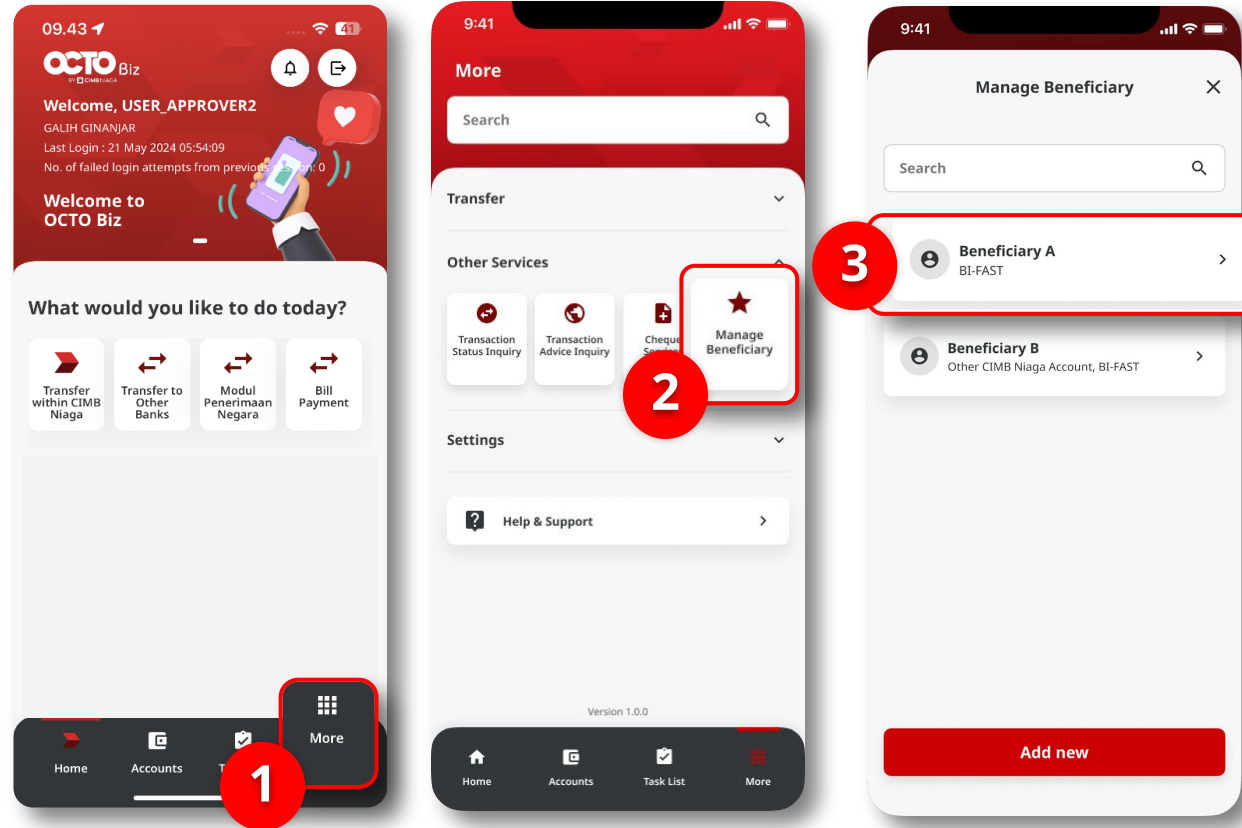
Login as **Maker**

1 Isi **Password**

Input **Password**

2 Klik **Proceed**

Click **Proceed**



1 Klik Menu **More**

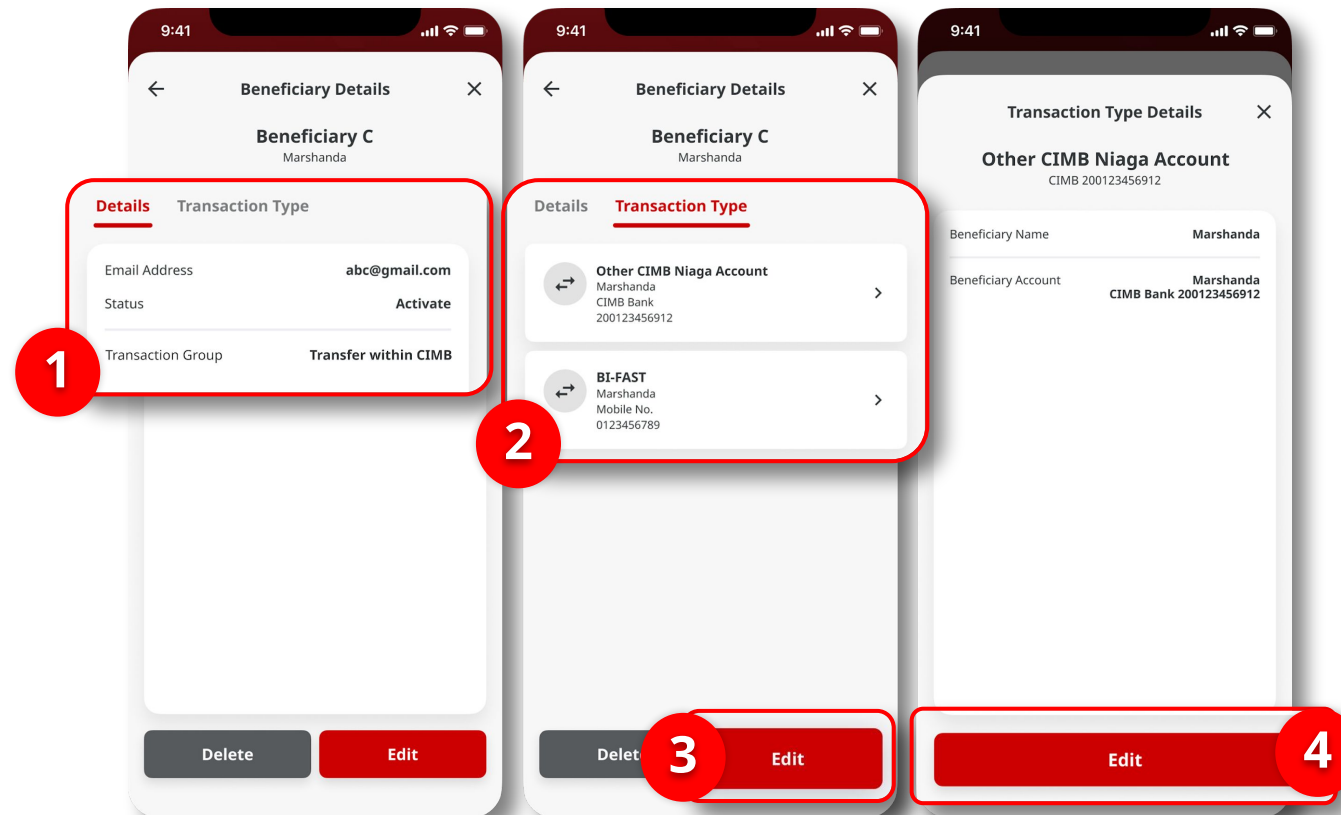
*Click **More** Menu*

2 Klik **Manage Beneficiary**

*Click **Manage Beneficiary***

3 Sistem akan menampilkan halaman **Manage Beneficiary**, Pilih **Beneficiary** yang akan di **Edit**

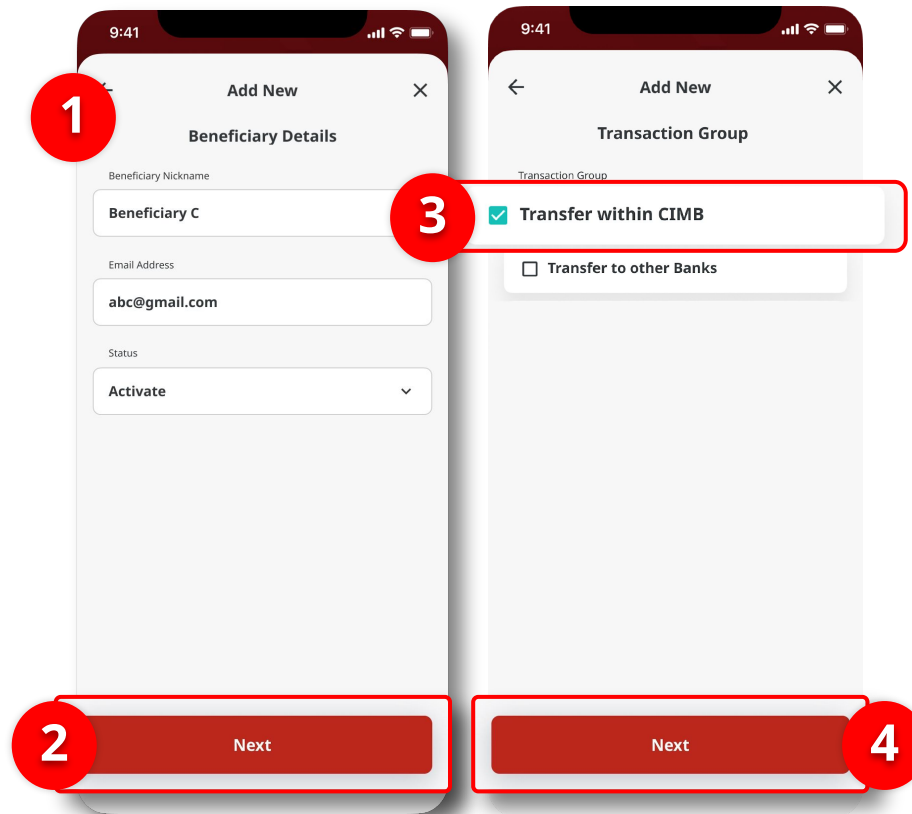
*System will show the **Manage Beneficiary** page, Choose **Beneficiary** to **Edit***



Sistem akan menampilkan halaman **Manage Beneficiary**

System will show the **Manage Beneficiary** page

- 1 Klik **Transaksi** yang ingin di **Edit**
Click Transaction to Edit
- 2 Klik **Edit**
Click Edit
- 3 **Edit Details** yang dibutuhkan
Edit Details
- 4 Klik **Next**
Click Next



- 1** Sistem akan mengarahkan ke Halaman **Beneficiary Details**

System will show the Beneficiary Details page

- 2** Klik **Next**

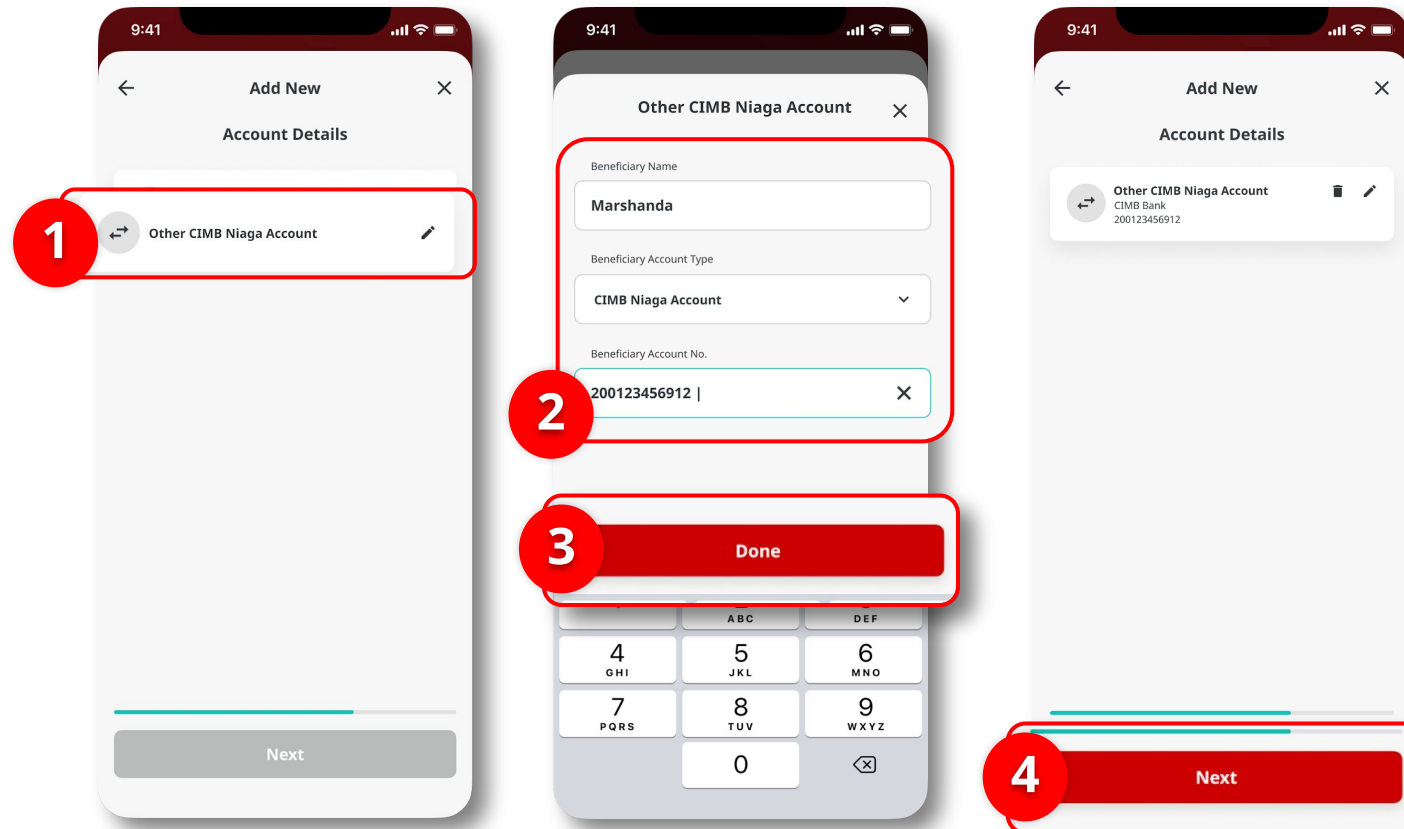
Click Next

- 3** Pilih **Transaction Group**

Choose Transaction Group

- 4** Klik **Next**

Click Next



1 Pilih **Account Details**

Choose **Account Details**

2 **Edit Detail** Transaksi

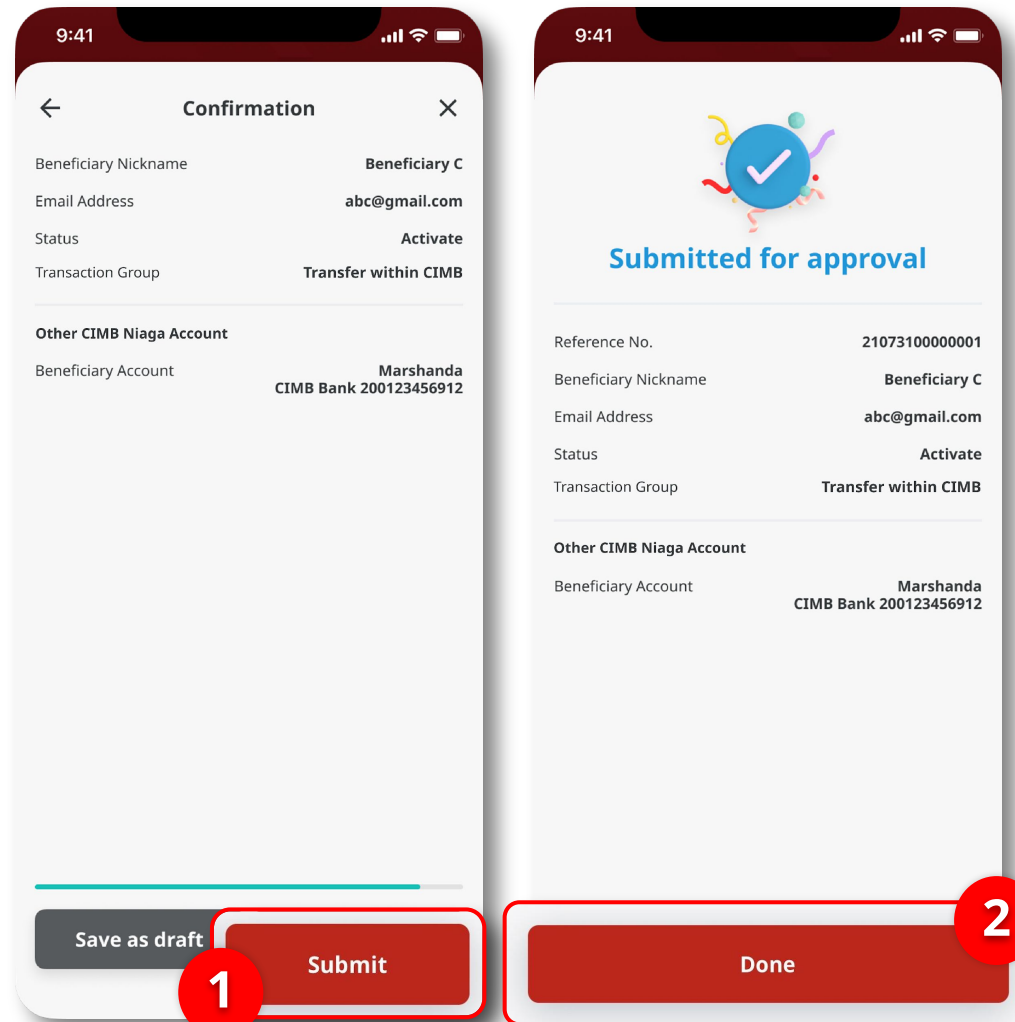
Edit Transaction Details

3 Klik **Done**

Click **Done**

4 Klik **Next**

Click **Next**



- 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 navigate to **Submitted for Approval page**. Click **Done***

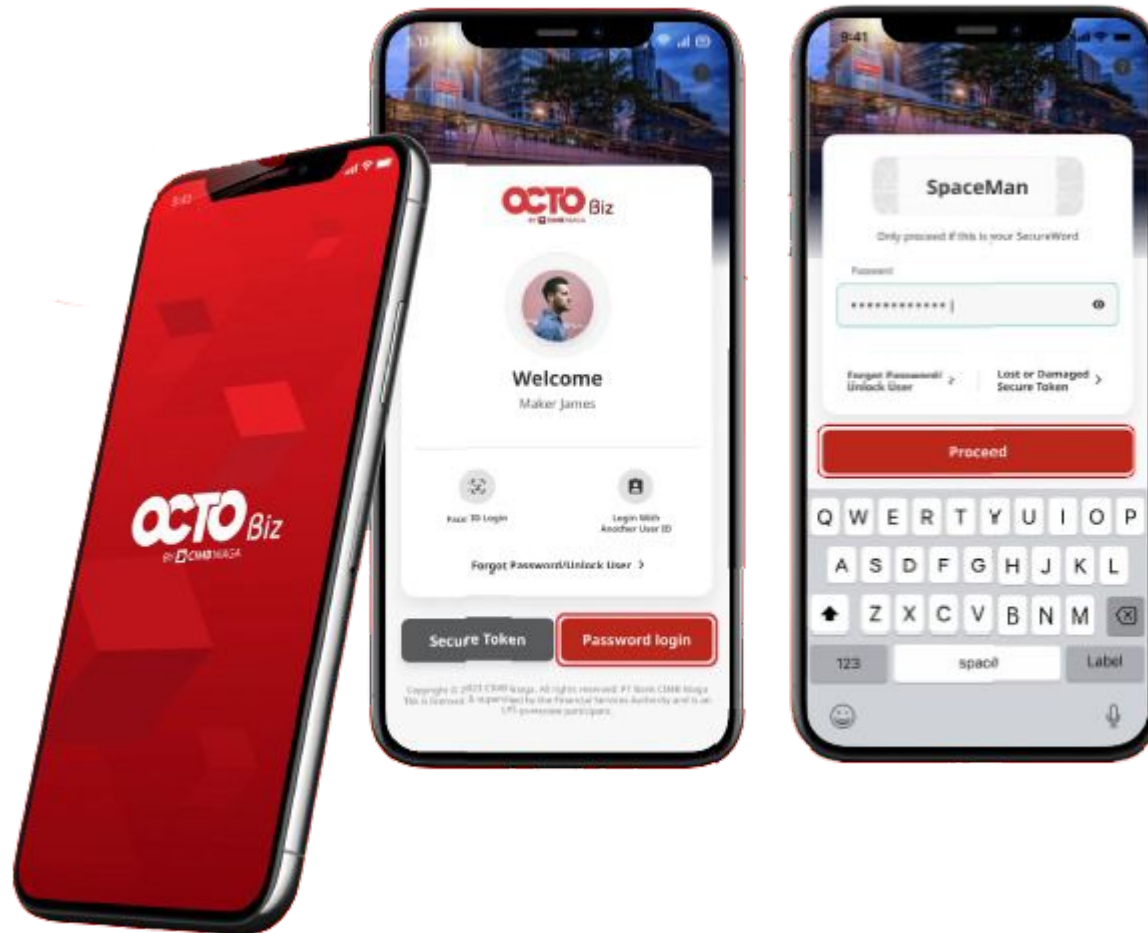
Manage Beneficiary

Create Transaction

Add

Modify

Delete



Login sebagai **Maker**

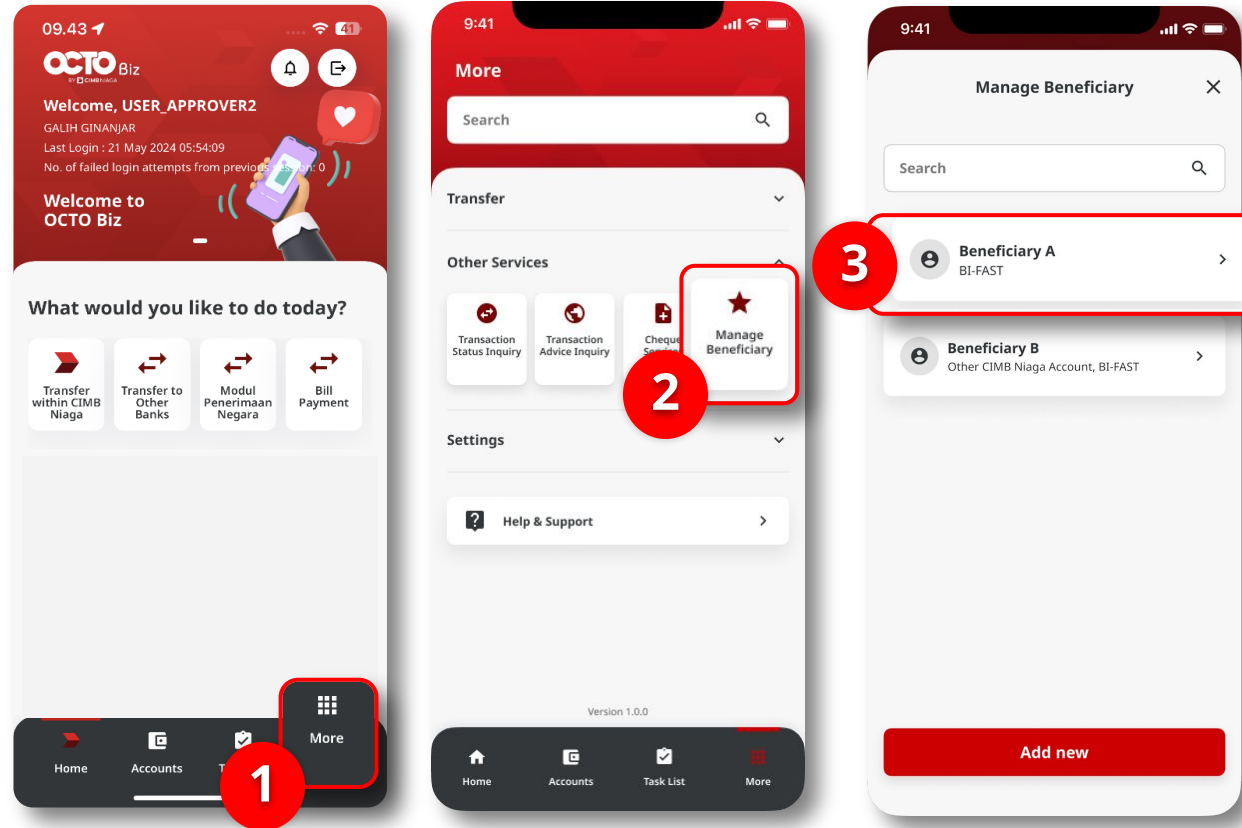
Login as **Maker**

1 Isi **Password**

Input **Password**

2 Klik **Proceed**

Click **Proceed**



1 Klik Menu **More**

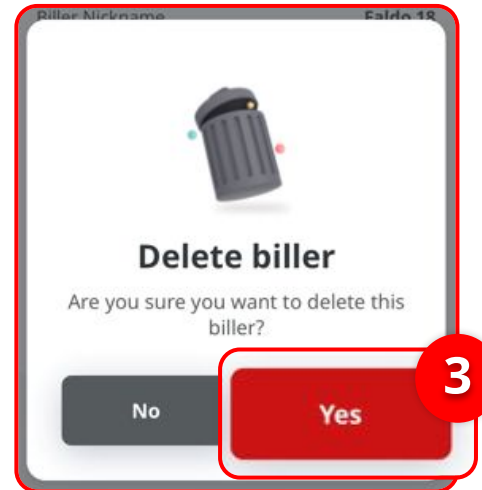
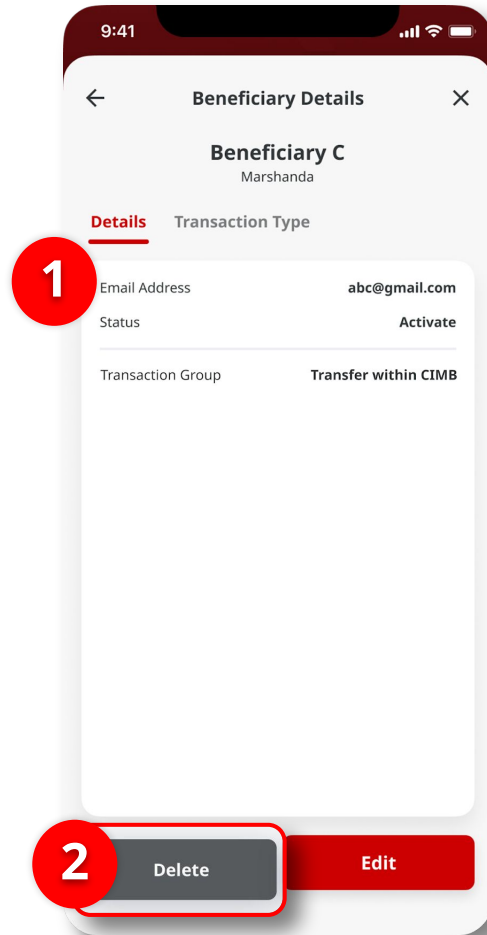
*Click **More** Menu*

2 Klik **Manage Beneficiary**

*Click **Manage Beneficiary***

3 Sistem akan menampilkan halaman **Manage Beneficiary**, Pilih **Beneficiary** yang akan di **Delete**

*System will show the **Manage Beneficiary** page, Choose **Beneficiary** to **Delete***



Sistem akan menampilkan halaman **Beneficiary Details**

System will show the **Beneficiary Details** page

1 Klik **Transaksi** yang ingin di **Delete**

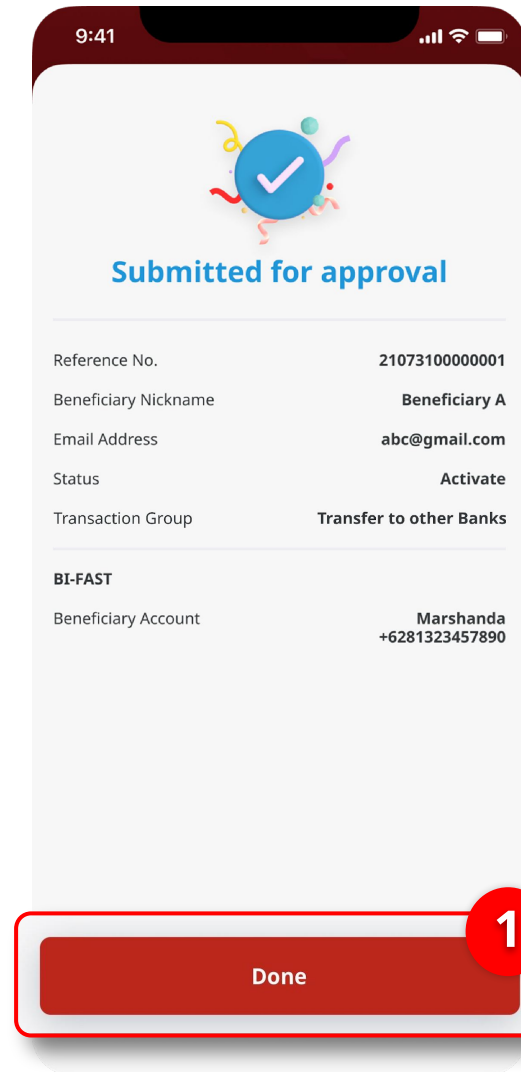
Click **Transaction** that needed to **Delete**

2 Klik **Delete**

Click **Delete**

3 Sistem akan menampilkan **Popup Delete Biller**, Klik **Yes**

System will show the **Delete Biller pop up**, click **Yes**

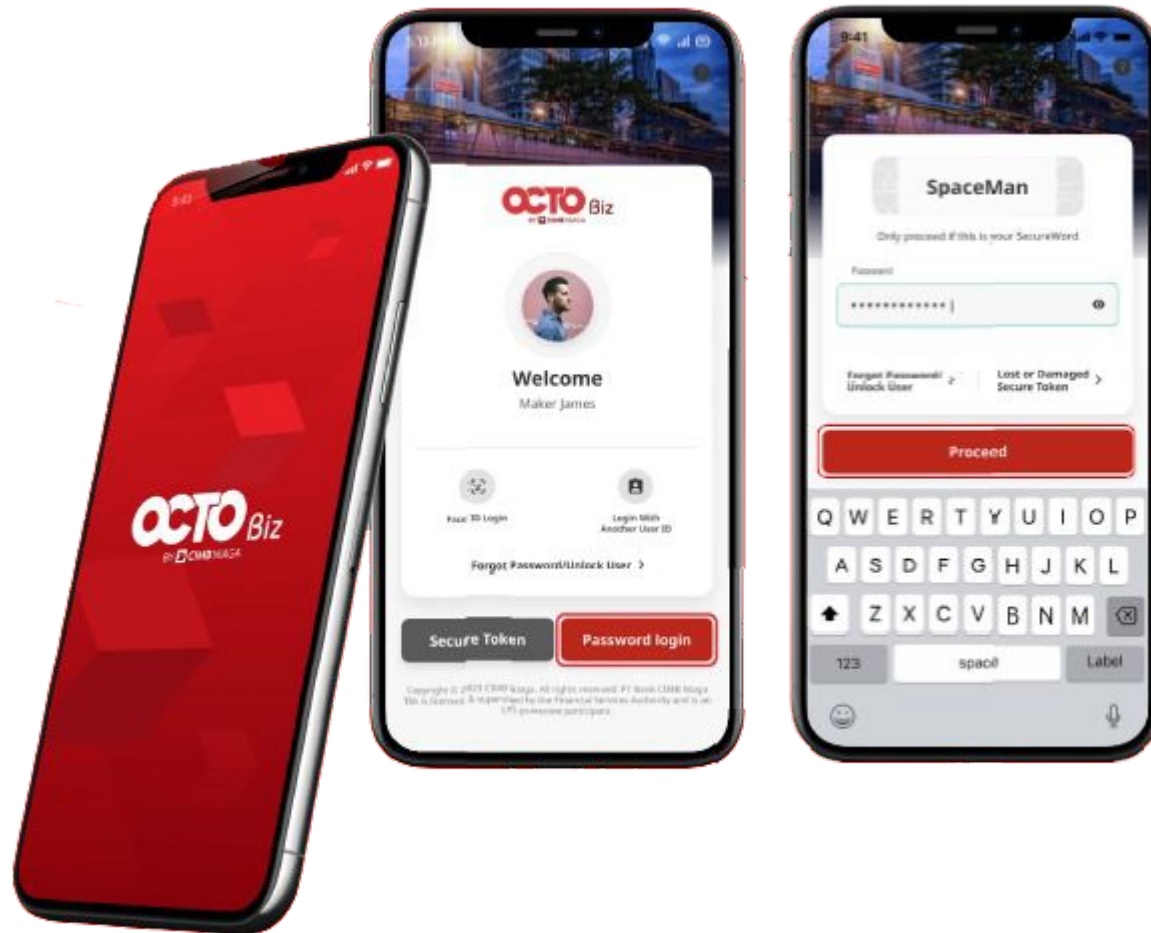


- 1 Jika berhasil, sistem akan mengarahkan ke halaman **Submitted for Approval**, Klik **Done**

Once *succeed*, system will navigate to **Submitted for Approval** page. Click **Done**

Manage Beneficiary

Approve Transaction



Login sebagai **Approver**

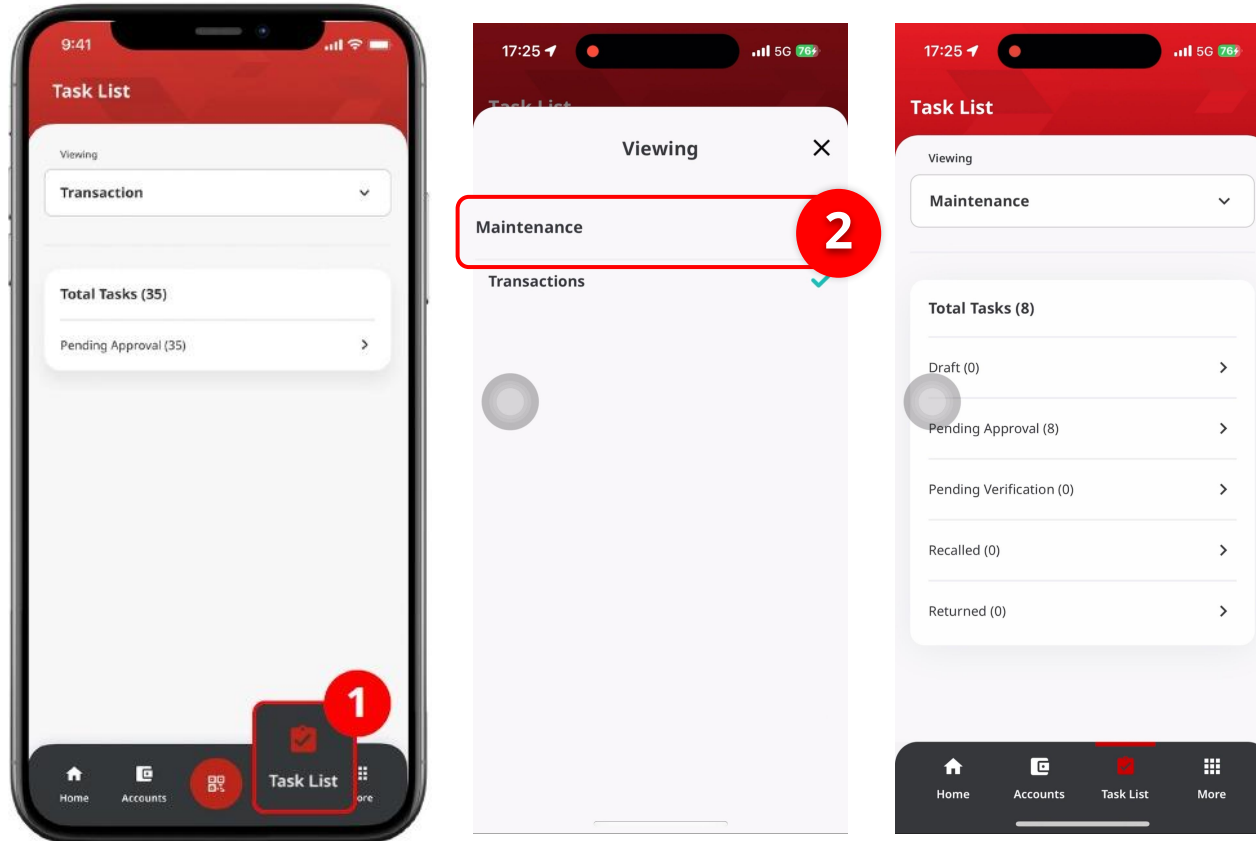
Login as Approver

1 Isi **Password**

Input Password

2 Klik **Proceed**

Click Proceed

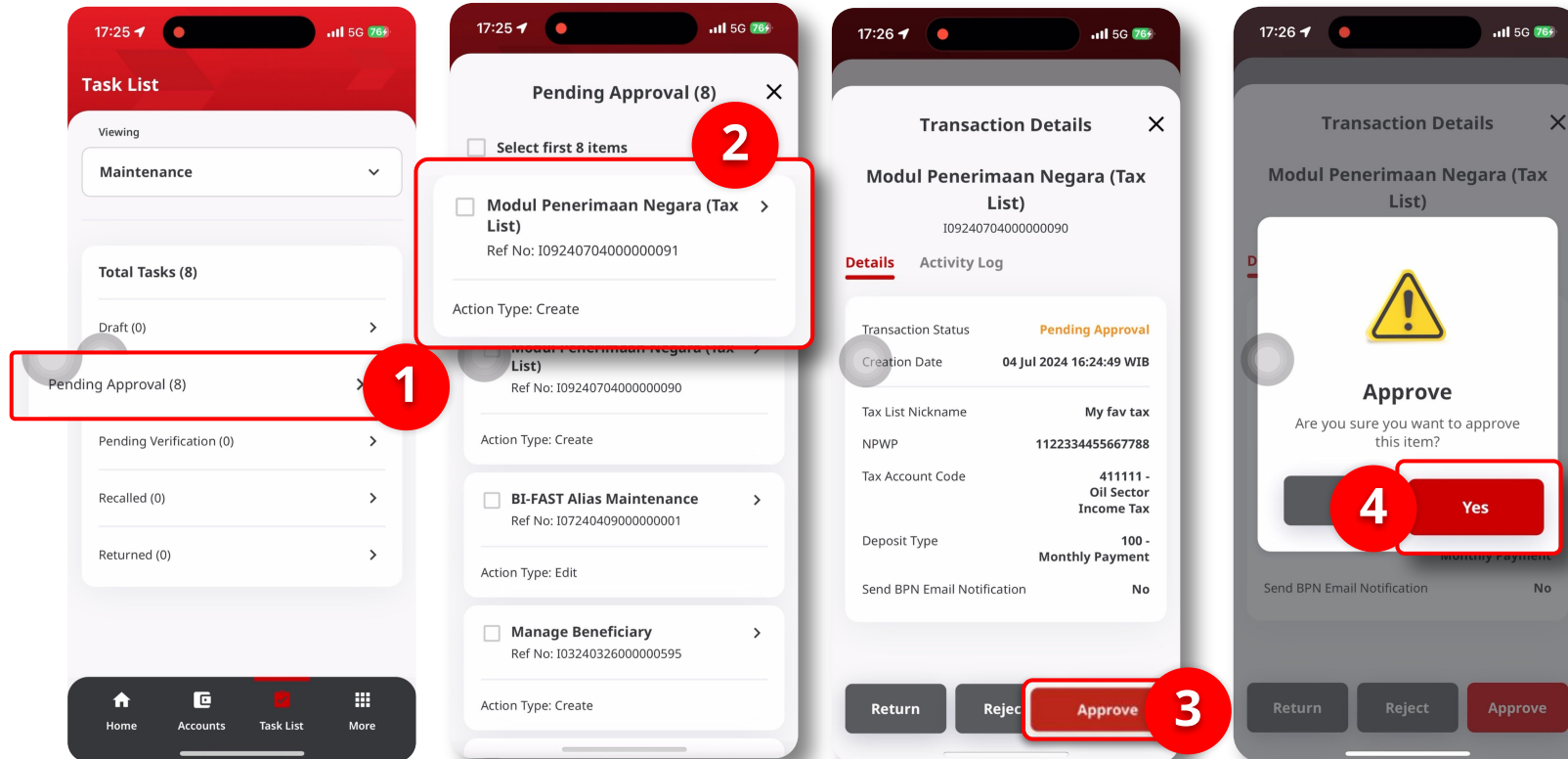


- 1 Arahkan pada menu dibawah, **klik Task List**

Navigate to menu, click Task List

- 2 Pilih **Maintenance** sebagai Viewing

Choose Maintenance as viewing



1 Pilih **Pending Approval**

Choose Pending Approval

2 Pilih Transaksi yang ingin di **Approve**

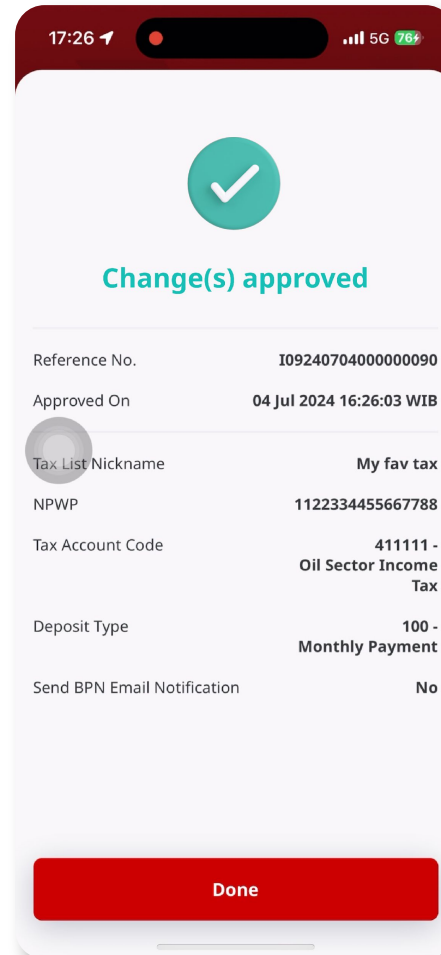
Choose Transaction to Approve

3 Klik **Approve**

Click Approve

4 Klik **Yes**

Click Yes



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

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



OCTO Biz
BY  **CIMB NIAGA**

