

The OCTOBIZ logo is prominently displayed in the center-right of the image. It features the word 'OCTOBIZ' in a large, bold, white, sans-serif font. The background of the entire slide is a vibrant red. On the left side, there is a photograph of a tall, modern skyscraper at night, with its windows illuminated. The building is partially obscured by a diagonal white line that runs from the top left towards the center. In the top left corner, there are abstract, flowing shapes in shades of orange, red, and purple, along with a grid of small white dots. A bright white starburst effect is positioned at the intersection of the diagonal line and the main text area.

Portfolio Summary

Account Statement – Transaction History

Website

TUTORIALOCTOBIZ2026

KEJAR MIMPI

Portfolio Summary

Account Statement – Transaction History

Account & Dashboard - Account Statement-Transaction History berfungsi untuk memeriksa mutasi rekening nasabah dari rekening tertentu

Account & Dashboard - Account Statement-Transaction History a function to check customer transaction history from specific accounts



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

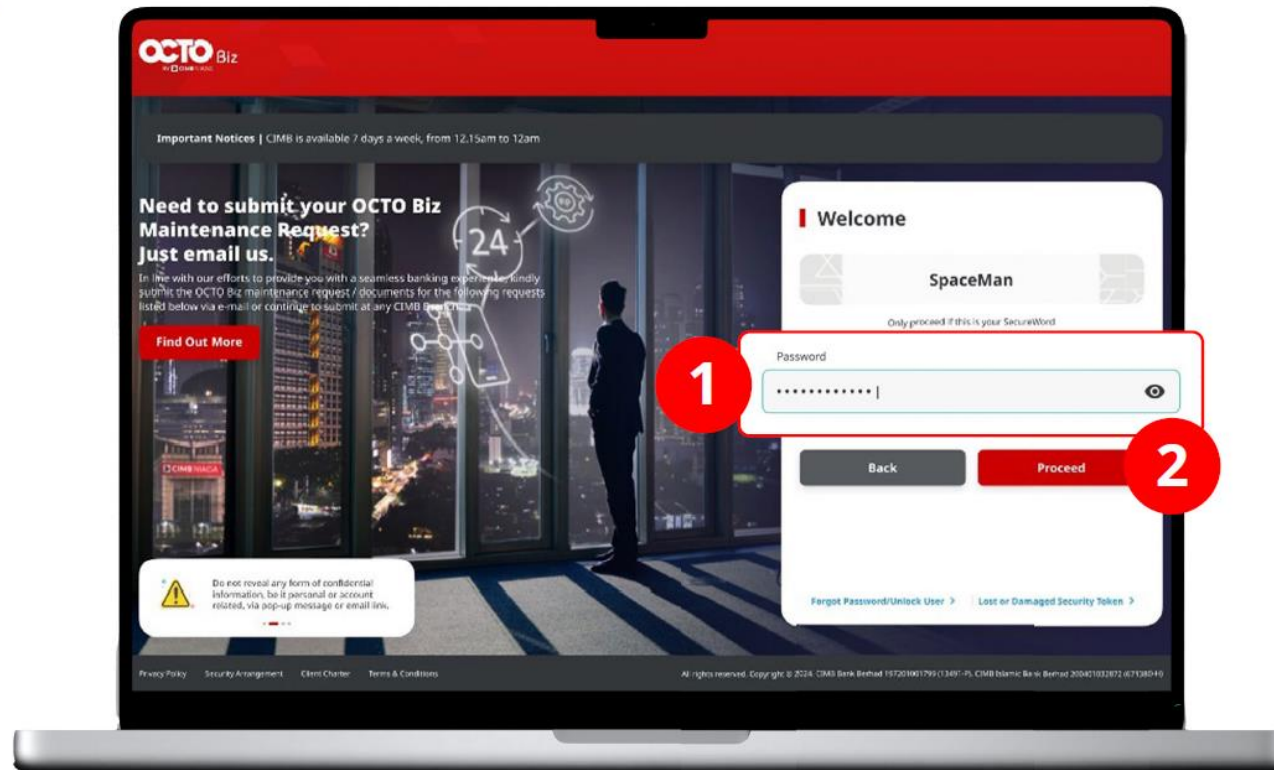
*Visit OCTO Biz website on:
www.octobiz.co.id*

- 2 Masuk dengan menggunakan
User & Company ID

Login using User & Company ID

- 3 Klik **Next**

Click Next

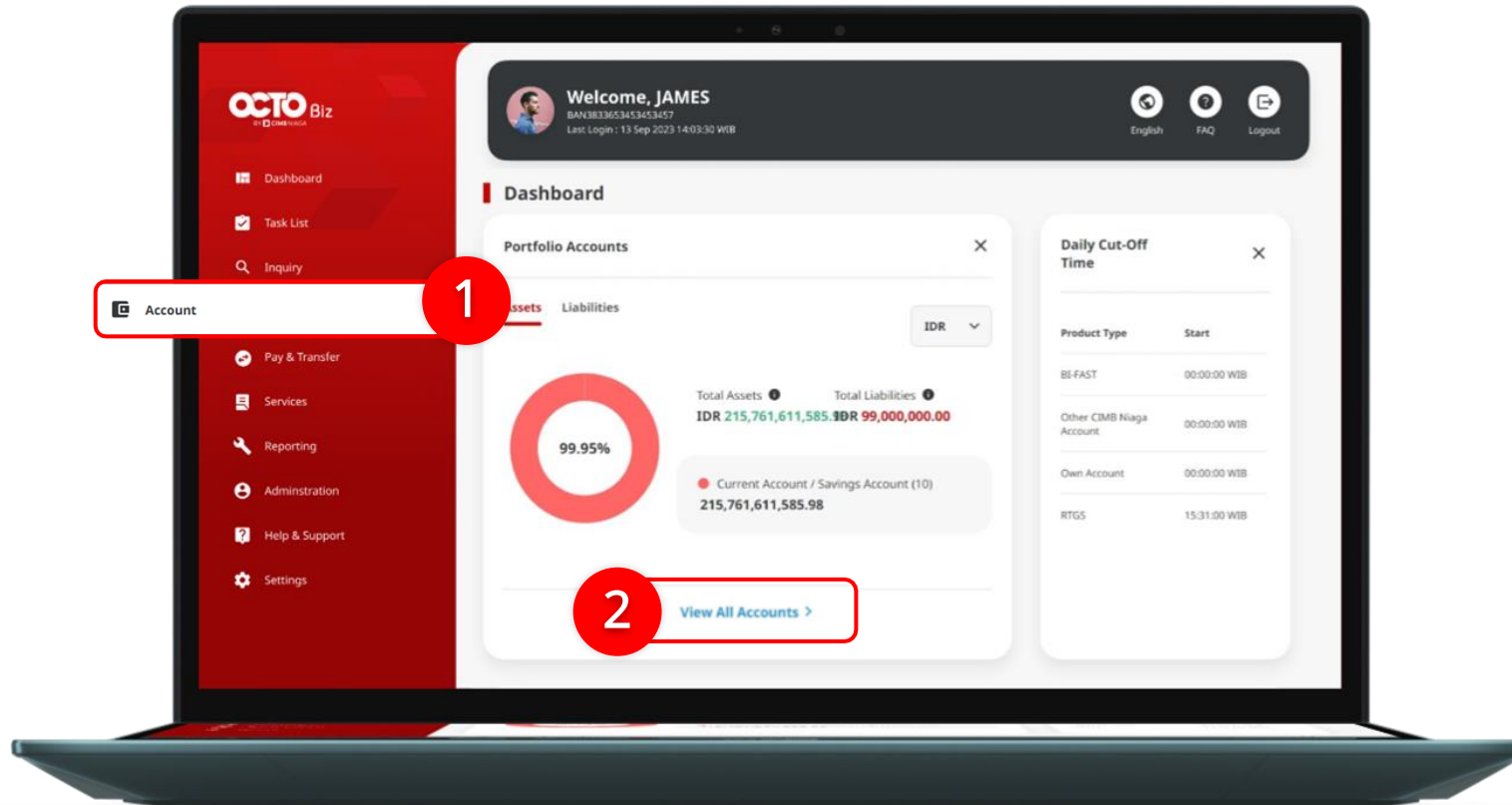


1 Isi *Password*

Input Password

2 Klik *Proceed*

Click Proceed



Sistem akan menampilkan halaman **Dashboard**

System will show Dashboard page

1 Klik **Account** pada *side menu*

Click Account on side menu

2 Atau Klik **View All Account** pada *Portfolio Summary*

Or click the View All Account button on Portfolio Summary

The screenshot displays the OCTOBIZ web application interface. On the left is a red sidebar with navigation links: Dashboard, Task List, Inquiry, Account, File Upload, Transactions, Bill Payment, Time Deposit, FX Rate Booking, Services, Reporting, Administration, Help & Support, and Settings. The main content area shows the 'Current Account / Saving Account' tab selected. It displays account details for '860002706240-USD-CIMB NIAGA' with a balance of IDR -8,271,167.96. Below this is the 'Transaction History' section with filters for Date Range (Month) and July 2026. A red box highlights the 'Download' button in the transaction history table.

Sistem akan menampilkan halaman *Account*

1 Pilih *Current Account/ Saving Account Tab*

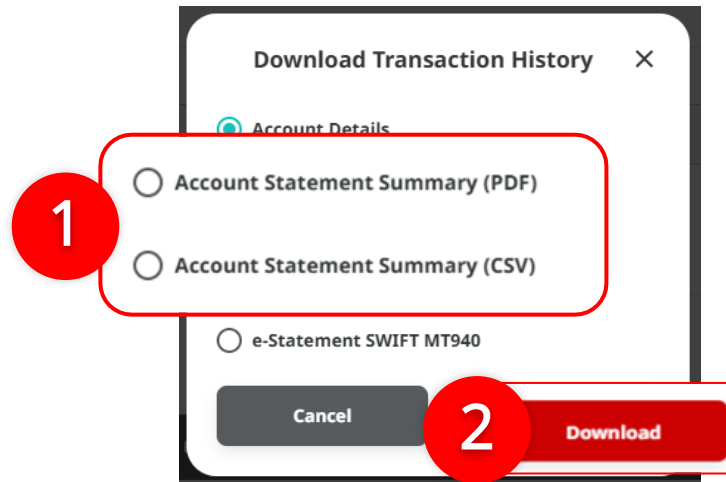
Choose Current Account/ Saving Account tab

2 Pilih Periode Transaksi, klik *Search*

Choose Transaction Period, click Search

3 Klik *Download* untuk *download* riwayat

Click Download to download account history



1 Pilih Jenis *Summary*

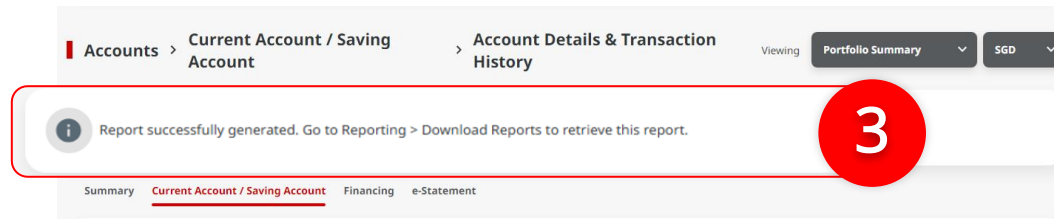
Choose summary type

2 Klik tombol *Download*

Click Download

3 Sistem akan menampilkan Notifikasi *Acknowledgement*

System will show the Acknowledgement notification pop up





- 1 Arahkan kursor ke **Reporting**

Navigate to Reporting

- 2 Klik **Download Reports**

Click Download Reports

Download Reports > Inquiry & Listing

Search

Company ID
BIZ030370RIZ

Report Type *
Portfolio

Report Name
Select

File Type
Select

Account Number
Select

Report Date *
27 Nov 2025

To
28 Nov 2025

Created By
Select

2 Search

Sistem akan menampilkan halaman *Inquiry & Listing*

System will show the Inquiry & Listing page

1 Pilih *portfolio* sebagai *Report Type*

Choose Transaction as Report Type

2 Klik *Search*

Click Search

Listing

☐	Report Type ▾	Report Name ▾	File Type ▾	Account No. ▾	Report Date / Timestamp ▾	File Size ▾	Created By ▾
☐	Portfolio	Account Detail	PDF	-	28 Nov 2025 17:40:46 WIB	16.42 KB	rizkavntg
☒	Portfolio	Account Statement Summary	PDF	-	28 Nov 2025 17:39:49 WIB	24.50 KB	rizkavntg

Download

Sistem akan menampilkan
Listing

System will show Listing

1 Pilih *Report*

Choose Report

2 Klik *Download*

Click Download



OCTOBIZ

BY  CIMB NIAGA

