



OCTOBIZ

Account & Dashboard

Dashboard

Website

TUTORIALOCTOBIZ2025

KEJAR MIMPI

Account & Dashboard

Dashboard

Account & Dashboard - Dashboard berfungsi untuk **memeriksa akun *Edit Template*** pada Portfolio

Account & Dashboard - Dashboard is used to check account and the template can be edited on portfolio

03

Dashboard

12

Personalized
Dashboard

Dashboard

Dashboard



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

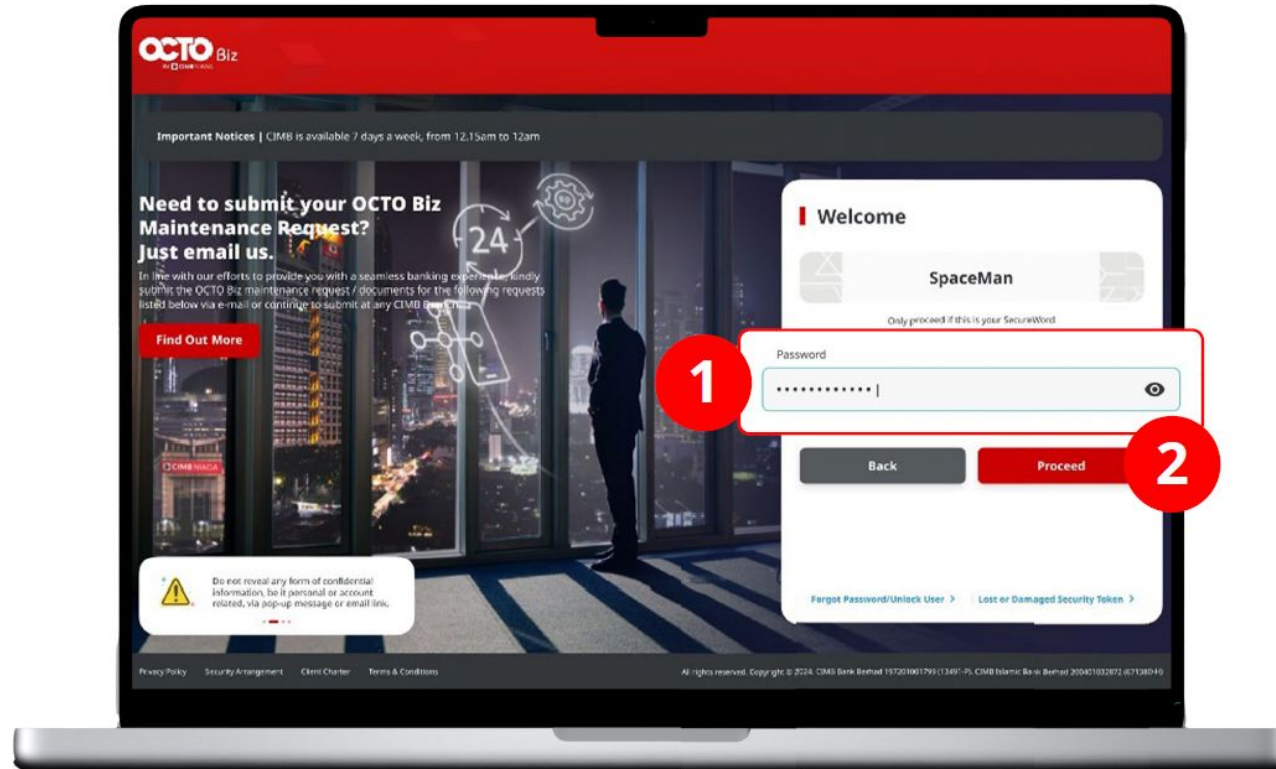
Visit OCTO Biz website:
www.octobiz.co.id

- 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

The screenshot displays the OCTOBIZ dashboard interface. A red box highlights the 'Portfolio Overview' widget, which is also marked with a red circle containing the number '1'. The widget shows a donut chart with 98.55% completion, indicating that assets are the dominant part of the portfolio. The total assets are IDR 97,984,739,595.57, and total liabilities are IDR 1,438,546,019.89. The current account balance is IDR 97,984,739,595.57. The dashboard also includes a sidebar with navigation options, a top navigation bar with user information and utility icons, and other widgets like 'Top Favourite Beneficiary' and 'Daily Cut-Off Time'.

Assets	Liabilities
Total Assets IDR 97,984,739,595.57	Total Liabilities IDR 1,438,546,019.89
Current Account (31) 97,984,739,595.57	

Sistem akan menampilkan halaman **Dashboard**

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

- 1 Sistem akan secara otomatis menampilkan **Portfolio Overview** bagian **Assets**

*System will automatically show the **Portfolio Overview Assets** part*

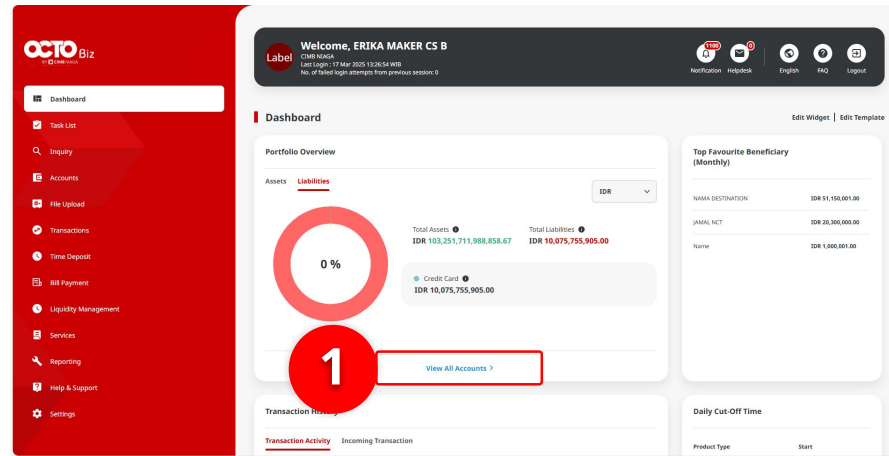
The screenshot displays the OCTOBIZ dashboard interface. A red sidebar on the left contains navigation options: Dashboard, Task List, Inquiry, Accounts, File Upload, Transactions, Time Deposit, Bill Payment, Liquidity Management, Services, Reporting, Help & Support, and Settings. The main content area shows a welcome message for ERIKA MAKER CS B, followed by a 'Dashboard' section. A widget titled 'Assets Liabilities' is highlighted with a red box and a red circle containing the number '1'. This widget shows a donut chart with '0%' and two data points: 'Total Assets IDR 103,251,711,988,858.67' and 'Total Liabilities IDR 10,075,755,905.00'. Below the chart, a 'Credit Card' section shows 'IDR 10,075,755,905.00'. To the right, there is a 'Top Favourite Beneficiary (Monthly)' table with columns for 'NAMA DESTINATION' and 'JAMAL NCT'. Below this, there is a 'Transaction History' section with a 'Transaction Activity' tab and an 'Incoming Transaction' section. At the bottom right, there is a 'Daily Cut-Off Time' section with a 'Product Type' and 'Start' field.

Sistem akan menampilkan halaman **Dashboard**

System will show the **Dashboard** page

- 1 Klik **Liabilities**, untuk melihat **overview**

Click **Liabilities** to see the **overview**

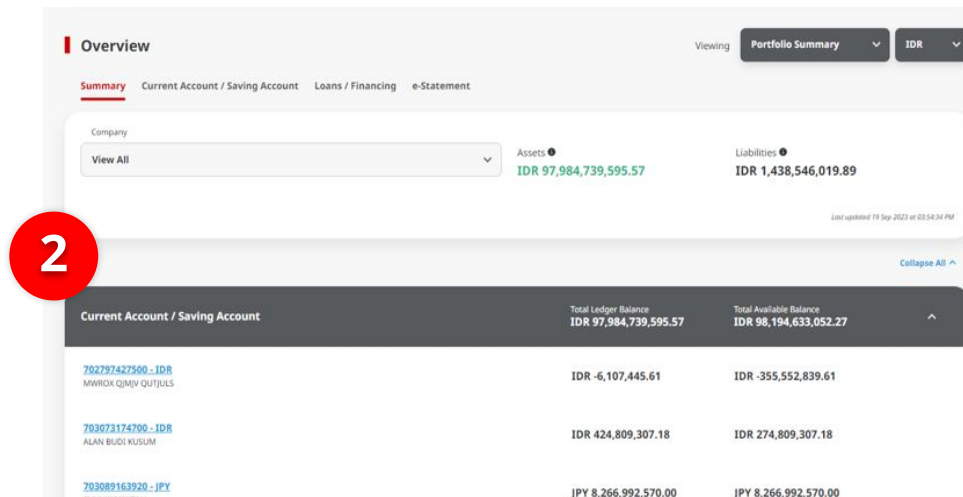


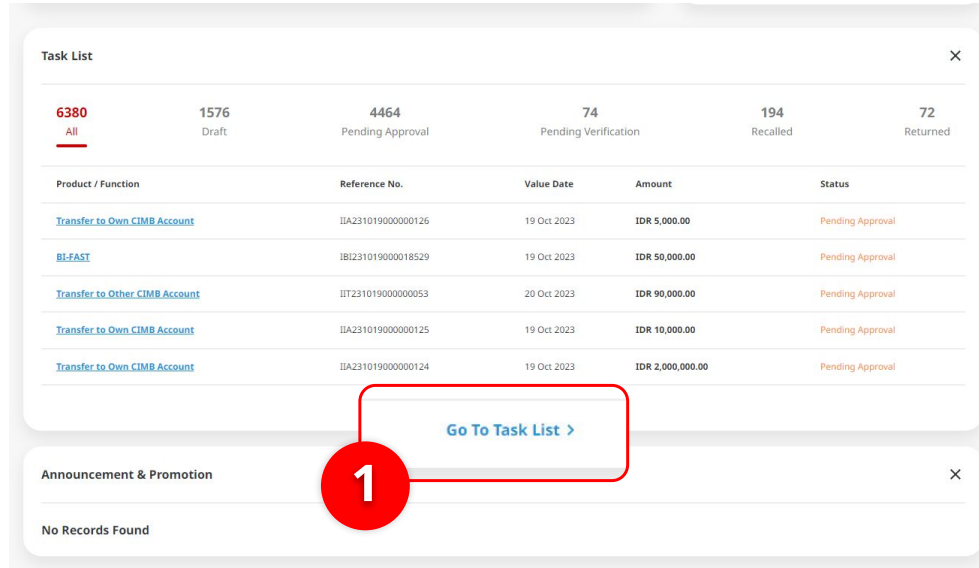
1 Klik **View All Accounts**

*Click **View All Accounts***

2 Sistem akan menampilkan **overview account** dalam bentuk **listing**

*System will show **listing of Account overview***





Task List

6380 All 1576 Draft 4464 Pending Approval 74 Pending Verification 194 Recalled 72 Returned

Product / Function	Reference No.	Value Date	Amount	Status
Transfer to Own CIMB Account	IIA23101900000126	19 Oct 2023	IDR 5,000.00	Pending Approval
BI-FAST	IBI231019000018529	19 Oct 2023	IDR 50,000.00	Pending Approval
Transfer to Other CIMB Account	IIT23101900000053	20 Oct 2023	IDR 90,000.00	Pending Approval
Transfer to Own CIMB Account	IIA23101900000125	19 Oct 2023	IDR 10,000.00	Pending Approval
Transfer to Own CIMB Account	IIA23101900000124	19 Oct 2023	IDR 2,000,000.00	Pending Approval

[Go To Task List >](#)

Announcement & Promotion

No Records Found

Untuk melihat **Task list** melalui **dashboard**

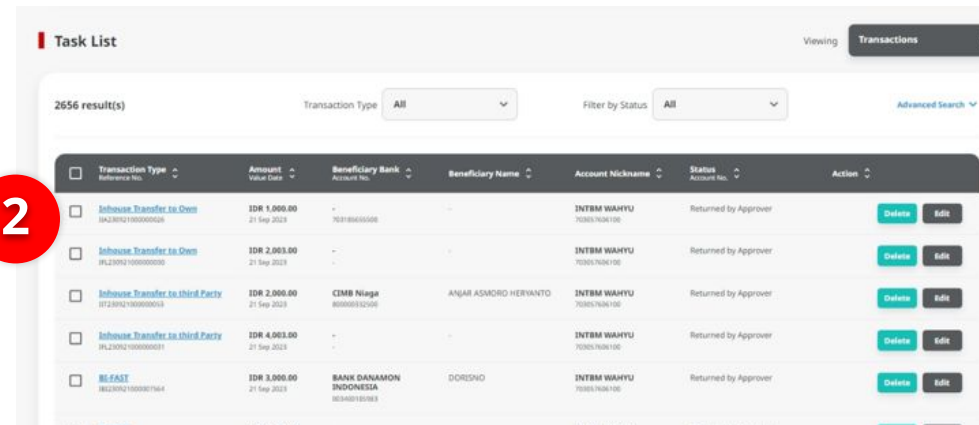
To see the **Task List** through **Dashboard**

- 1 Scroll kebawah, sistem akan menampilkan **task list widget**. Klik **Go to Task list** untuk menuju **halaman Task List**

Scroll down, system will show the **Task List widget**. Click **Go to Task List** to go to **Task List page**

- 2 Sistem akan menampilkan halaman **Task List**

System will show the **Task List Page**



Task List Viewing: Transactions

2656 result(s) Transaction Type: All Filter by Status: All Advanced Search

Transaction Type	Amount	Beneficiary Bank	Beneficiary Name	Account Nickname	Status	Action
<input type="checkbox"/> Inhouse Transfer to Own	IDR 1,000.00	-	-	INTBM WAHYU	Returned by Approver	Delete Edit
<input type="checkbox"/> Inhouse Transfer to Own	IDR 2,000.00	-	-	INTBM WAHYU	Returned by Approver	Delete Edit
<input type="checkbox"/> Inhouse Transfer to third Party	IDR 2,000.00	CIMB Niaga	ANJAR ASMORID HERVANTO	INTBM WAHYU	Returned by Approver	Delete Edit
<input type="checkbox"/> Inhouse Transfer to third Party	IDR 4,000.00	-	-	INTBM WAHYU	Returned by Approver	Delete Edit
<input type="checkbox"/> BI-FAST	IDR 3,000.00	BANK DANAMON INDONESIA	DORISNO	INTBM WAHYU	Returned by Approver	Delete Edit

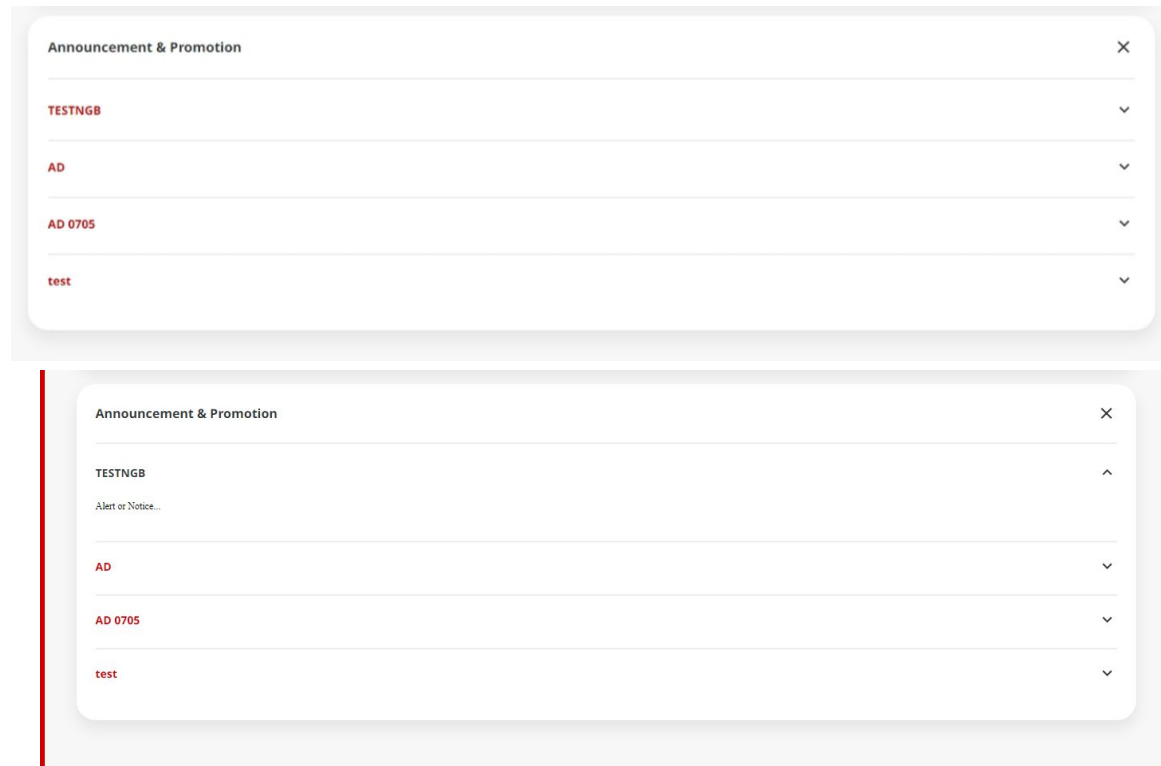
Daily Cut-Off Time ×

Product Type	Start
In house Transfer to Own	17:08:04 WIB
Bulk In house Transfer to Own	17:08:04 WIB
In house Transfer to Third Party	17:08:04 WIB
Bulk In house Transfer to Third Party	17:08:04 WIB

* The cut-off time for Outward Telegraphic Transfer and Foreign Currency Transfer may also be subject to the respective currency cut-off times.

Untuk melihat **Daily Cut off time** per produk melalui **dashboard**

To see **Daily Cut Off Time** for each **product** through **Dashboard**



Untuk melihat **Informasi dan pengumuman** melalui *dashboard*

To see the **Information and announcement** through *Dashboard*

Expired Transactions (30)

Product / Function	Reference No.	Payment Date	Amount
Transfer to Other Banks (Pilot)	ISK250324000000065	24 Mar 2025	IDR 2,000.00
Transfer to Other Banks	IDQ250324000014361	24 Mar 2025	IDR 3,000.00
International Payment	IFT250324000004806	24 Mar 2025	IDR 100.00
Bill Payment	IFL250324000000024	24 Mar 2025	IDR 23,426,756.00
Bill Payment	IFL250324000000022	24 Mar 2025	IDR 2,623,423.00
Transfer to Other Banks	ISK250324000000063	24 Mar 2025	IDR 21,312,321.00

[Go to Transaction Status Inquiry >](#)

Untuk melihat *Expired Transaction* melalui *dashboard*

To see the *Expired* through *Dashboard*

Transaction Status Inquiry

1

Search

Agreement Book Name * 24 Mar 2025 Your Reference Number

Transaction Group * All Payment Mode

Order Account No. Identifier Account No.

Identifying Name Identifier Mark 1 (string) 10

Accounting Account Status No All Name

No Reference No. Filter By Status * All

Returning Order Status

Search

17 Items(2)

Transaction Order / Transaction	Amount	Identifying Name / Identifier	Identifying Name / Identifier	Payment Date	Ordered Date	Status
Transfer to Other Banks	IDR 2,000.00	BANK CAPITAL	BANK BERTANJARA	24 Mar 2025	24 Mar 2025	Expired
International Payment	IDR 100.00	PT. BANK PEMBANGUNAN DAERAH KAL	123	24 Mar 2025	24 Mar 2025	Expired
Transfer to Other Banks	IDR 2,000.00	CMB Naga	BANK BERTANJARA	24 Mar 2025	24 Mar 2025	Expired
Transfer to Other Banks (Pilot)	IDR 2,000.00	BANK BERTANJARA INDONESIA	123	24 Mar 2025	24 Mar 2025	Expired
Bill Payment	IDR 23,426,756.00	-	PL250324000000024	24 Mar 2025	24 Mar 2025	Expired
Bill Payment	IDR 2,623,423.00	-	PL250324000000022	24 Mar 2025	24 Mar 2025	Expired
Bill Payment	IDR 2,623,423.00	-	PL250324000000022	24 Mar 2025	24 Mar 2025	Expired
Transfer to Other Banks	IDR 21,312,321.00	BANK BERTANJARA	PT250324000000063	24 Mar 2025	24 Mar 2025	Expired
International Payment	IDR 100.00	PT. BANK PEMBANGUNAN DAERAH KAL	123	24 Mar 2025	24 Mar 2025	Expired
Transfer to Other Banks	IDR 2,000.00	BANK BERTANJARA INDONESIA	123	24 Mar 2025	24 Mar 2025	Expired

Print Download

- 1 Scroll kebawah, sistem akan menampilkan *task list widget* dengan Status **Expired**. Klik **Go to Task list** untuk menuju **halaman Task List**

Scroll down, system will show the **Task List widget** with **Expired** status. Click **Go to Task List** to go to **Task List page**

- 2 Sistem akan menampilkan halaman **Task List**

System will show the **Task List Page**

Account

Personalized Dashboard

Edit Widget

Edit Template

Account

Personalized Dashboard

Edit Widget



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

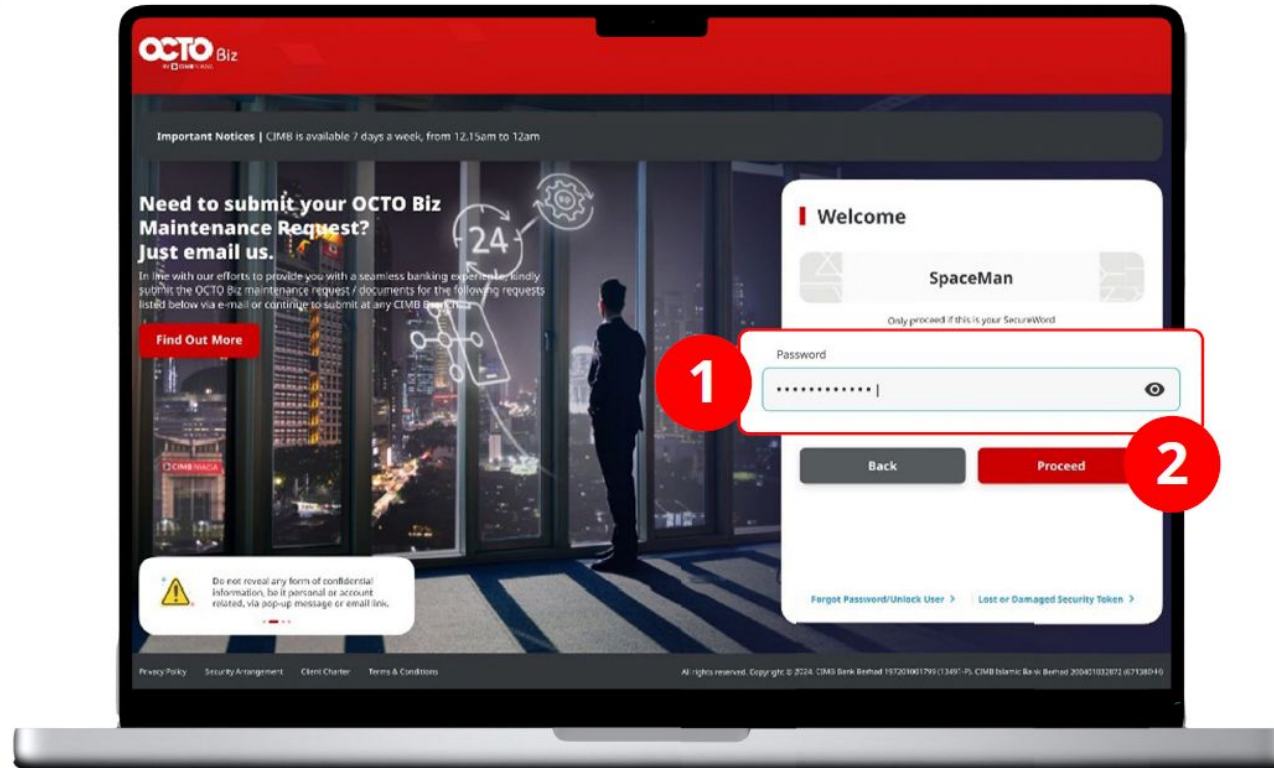
Visit OCTO Biz website:
www.octobiz.co.id

- 2 Masuk dengan menggunakan
User & Company ID

Login using *User & Company ID*

- 3 Klik **Next**

Click *Next*

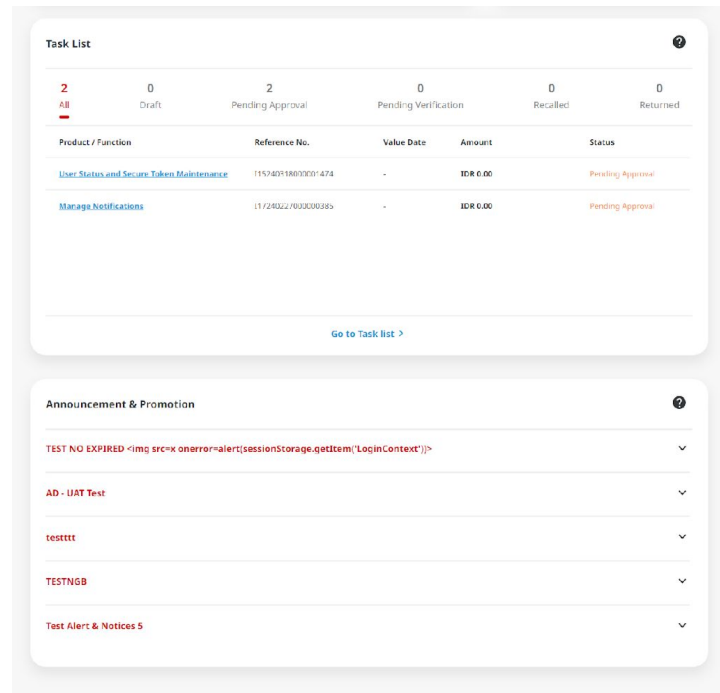
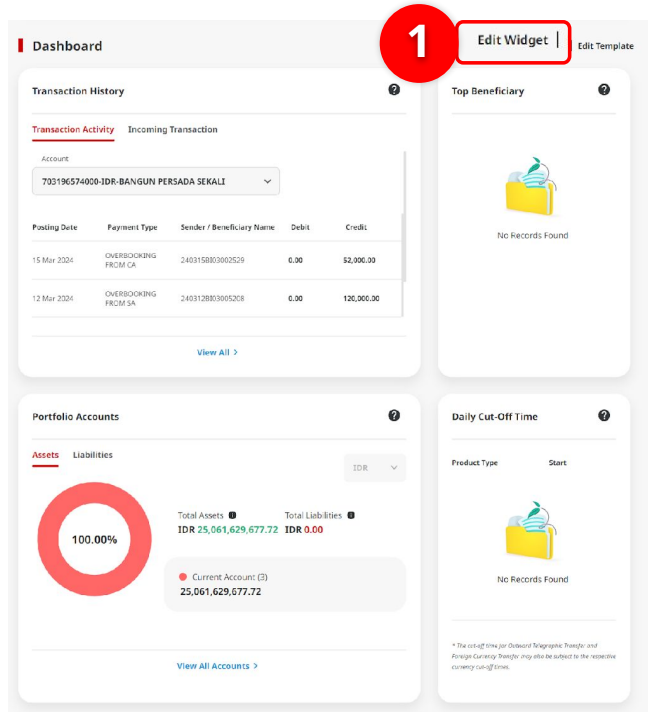


1 Isi **Password**

Input Password

2 Klik **Proceed**

Click Proceed



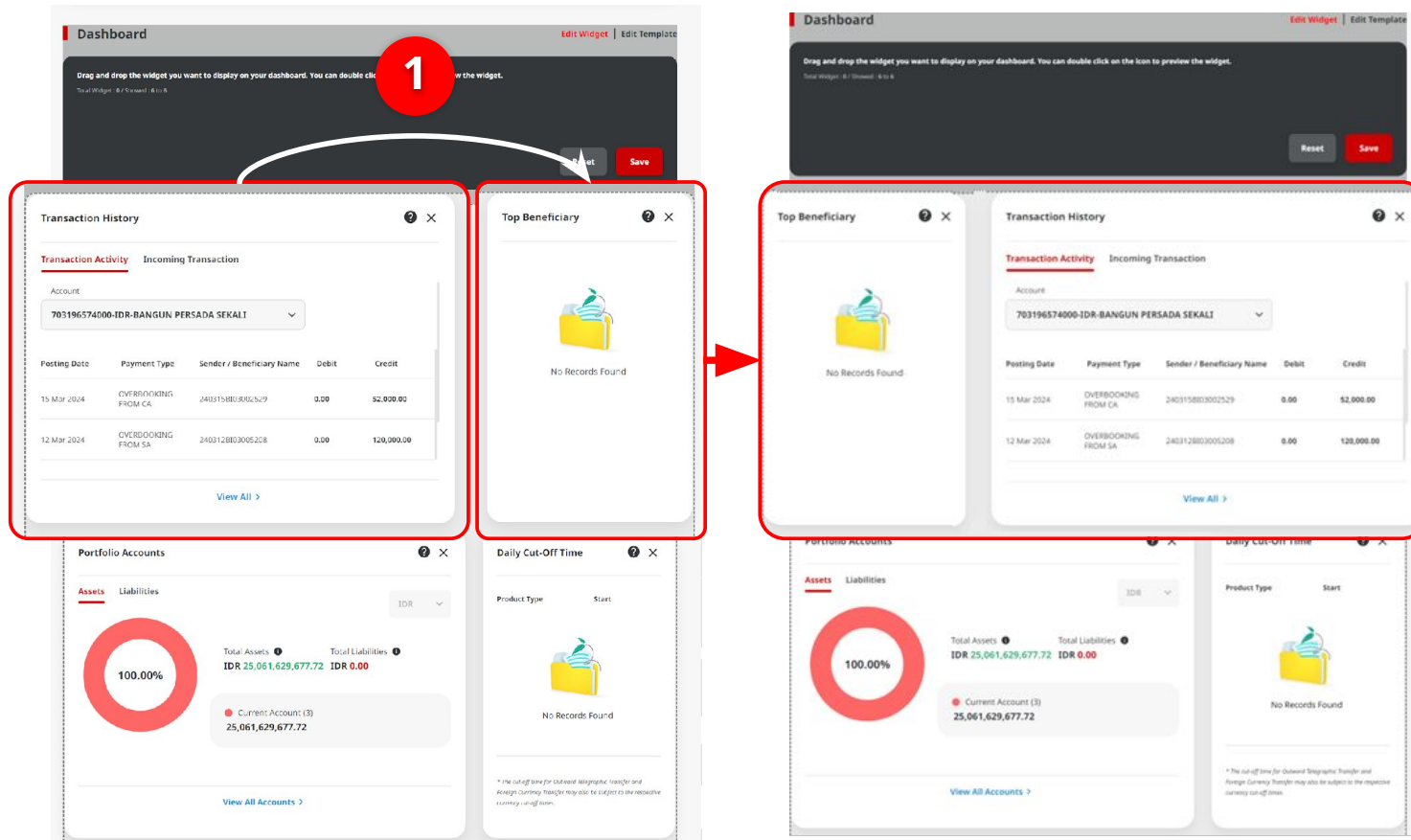
Sistem akan menampilkan halaman **Dashboard**

System will show the *Dashboard page*

- 1 Scroll kebawah, Klik **Edit Widget**
Scroll down, click **Edit Widget**

LANGKAH

04



System akan menampilkan halaman **Edit Dashboard**

System will show the *Edit Dashboard* page

1 User dapat memindahkan **widget** di **Dashboard**

User can move the **widget** to **Dashboard**

Dashboard

Drag and drop the widget you want to display on your dashboard. You can double click on the icon to preview the widget.
Total Widget: 0 / Named: 4 in 5

Transaction History

Transaction Activity Incoming Transaction

Account
703196574000-IDR-BANGUN PERSADA SEKALI

Posting Date	Payment Type	Sender / Beneficiary Name	Debit	Credit
15 Mar 2024	OVERBOOKING FROM CA	240315880300529	0.00	52,000.00
12 Mar 2024	OVERBOOKING FROM SA	240312803005208	0.00	120,000.00

View All >

Top Beneficiary

No Records Found

Portfolio Accounts

Assets Liabilities

IDR

100.00%

Total Assets
IDR 25,061,629,677.72

Total Liabilities
IDR 0.00

Current Account: (3)
25,061,629,677.72

View All Accounts >

Daily Cut-Off Time

Product Type Start

No Records Found

* The cut-off time for Outward Telegraphic Transfer and Foreign Currency Transfer may also be subject to the respective currency cut-off time.

- 1 Klik untuk **menghapus *Widget*** dari ***Dashboard***

*Click to **Delete the widget** from Dashboard*

- 2 User dapat mengembalikan **pengaturan *default*** dengan klik pada tombol ***Reset***

*User can **Reset the default settings** using **Reset button***

LANGKAH

06

Dashboard

Edit Widget | Edit Template

Drag and drop the widget you want to display on your dashboard. You can double click on the icon to preview the widget.

Total Widget : 6 / Showed : 0 to 6

1

2

Reset Save

Transaction History

Transaction History

Transaction Activity Incoming Transaction

Account

703196574000-IDR-BANGUN PERSADA SEKALI

Posting Date	Payment Type	Sender / Beneficiary Name	Debit	Credit
15 Mar 2024	OVERBOOKING FROM CA	240315803002529	0.00	52,000.00
12 Mar 2024	OVERBOOKING FROM SA	240312803005208	0.00	120,000.00
12 Mar 2024	OVERBOOKING FROM SA	240312803005207	0.00	130,000.00

View All >

3 OK

Drag your widget here...

- 1 Widget yang telah **dihapus**, akan **otomatis tersimpan** di atas **tab Dashboard**

*Widget that **already deleted**, will **automatically saved** above the Dashboard page*

- 2 Klik **2 kali** untuk melihat **Preview Widget**

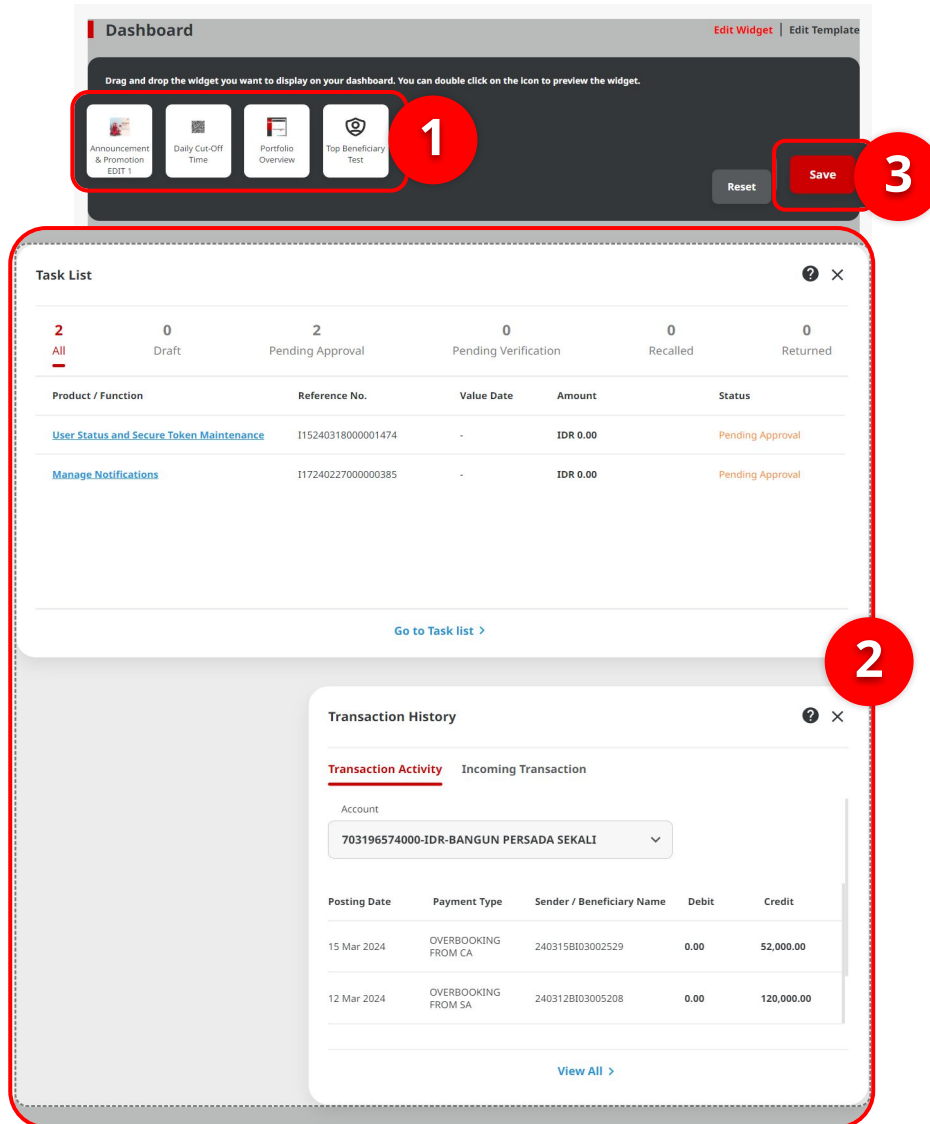
Double click to see the Preview widget

- 3 Klik **OK** untuk menutup **Lightbox Preview**

*Click **OK** to close the preview lightbox*

LANGKAH

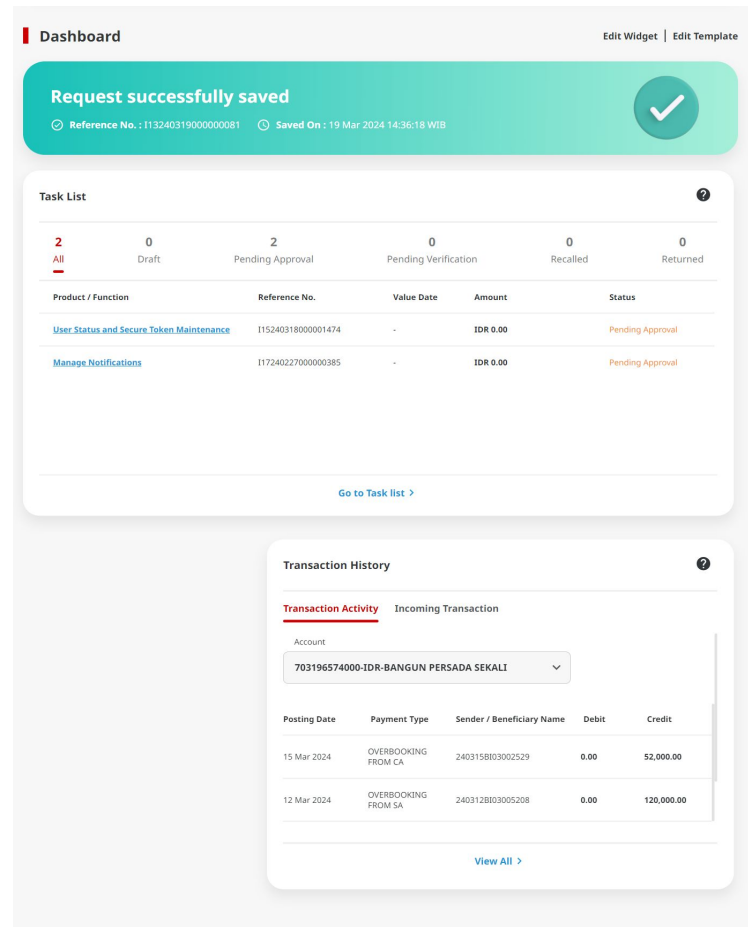
07



Edit Widget | Dashboard

Menu: Dashboard > Portfolio

- 1 Widget dapat dipindahkan ke **Dashboard** dibawah
Widget can be move to bottom side of Dashboard
- 2 Sebagai contoh **Task list** & **Transaction History**
For example the Task List & Transaction History
- 3 Klik **Save**
Click Save
- 4 Klik **Yes**
Click Yes



Sistem akan menampilkan halaman **Dashboard** dengan pesan **Acknowledgement**

*System will show the **Dashboard** with the **Acknowledgement pop up***

Account

Personalized Dashboard

Edit Template

LANGKAH

01



- 1 Kunjungi Website OCTO Biz di:
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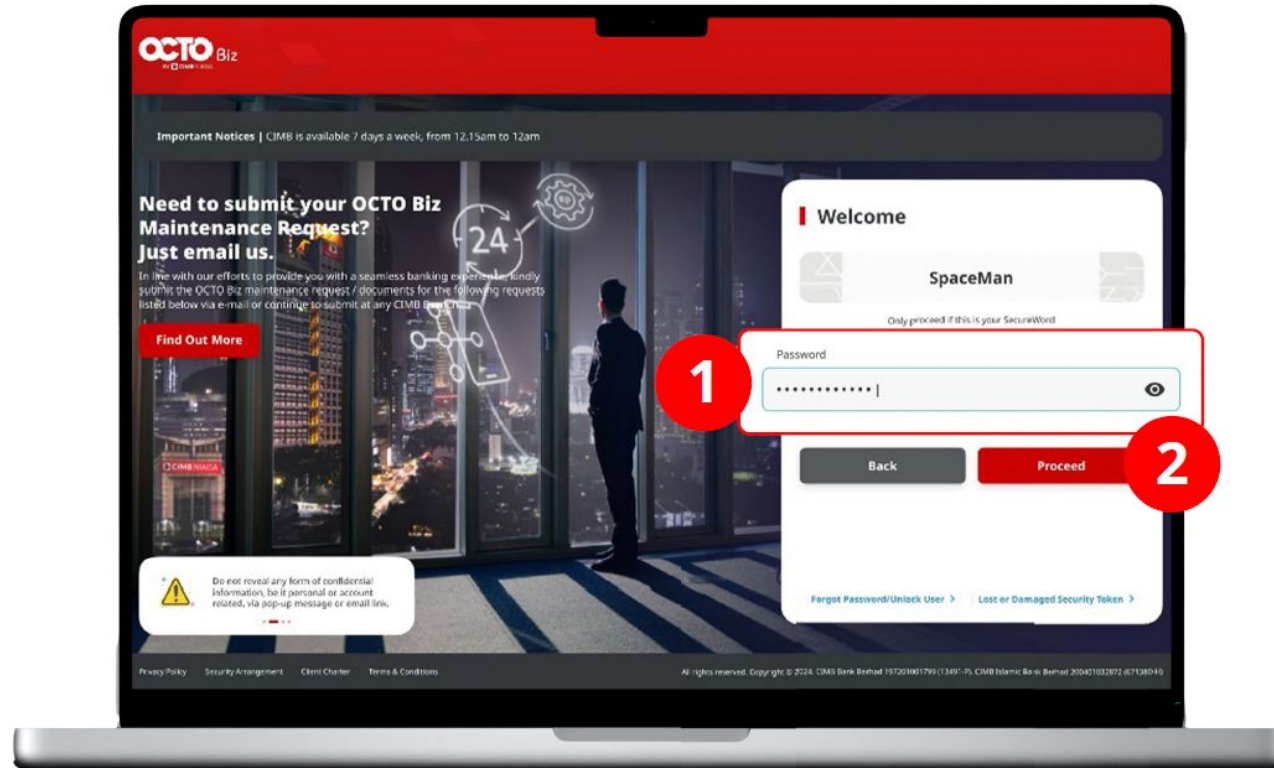
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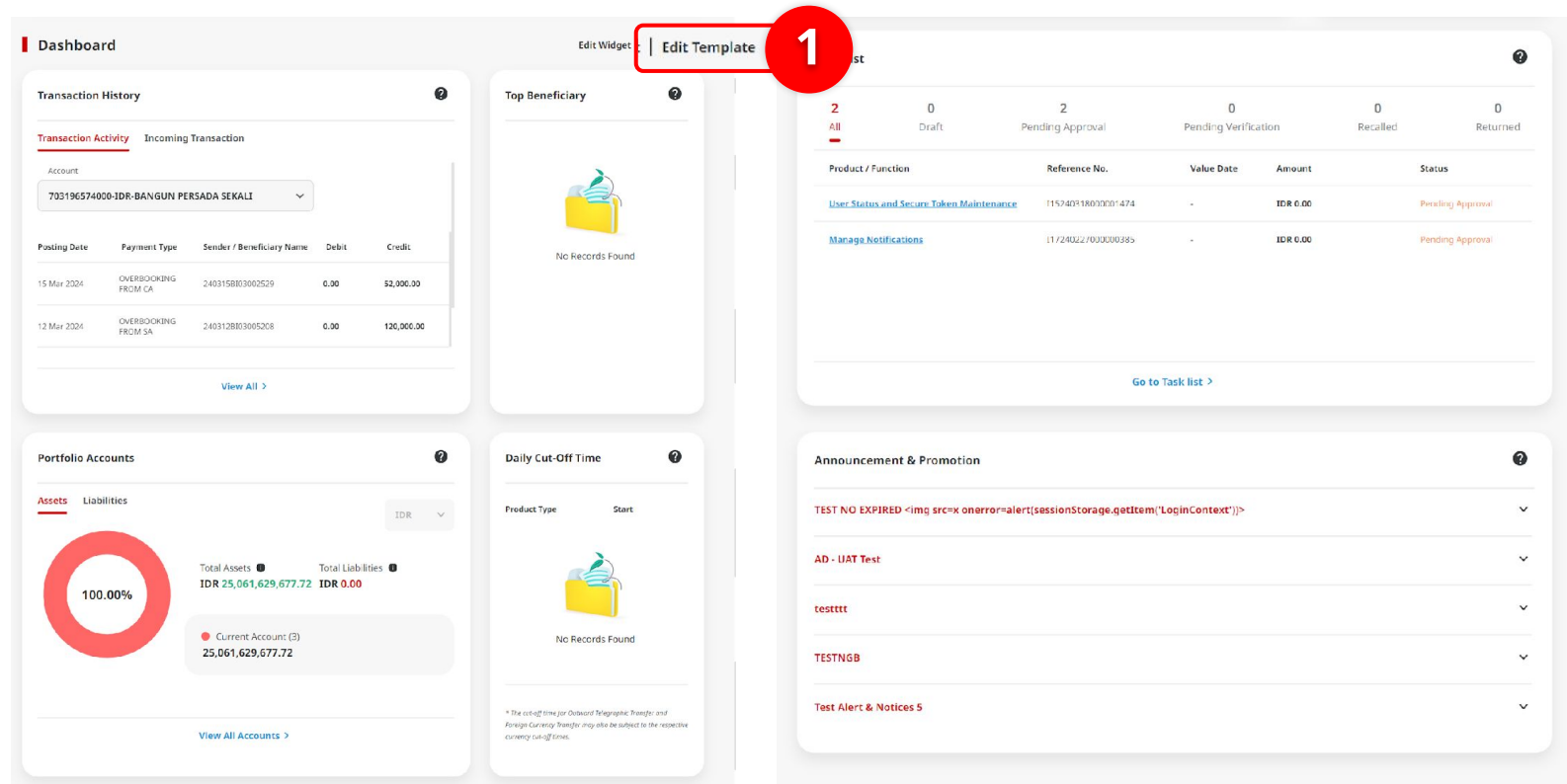
- 3 Klik **Next**

Click *Next*



1 Isi **Password**
Input Password

2 Klik **Proceed**
Click Proceed



Sistem akan menampilkan halaman **Dashboard**

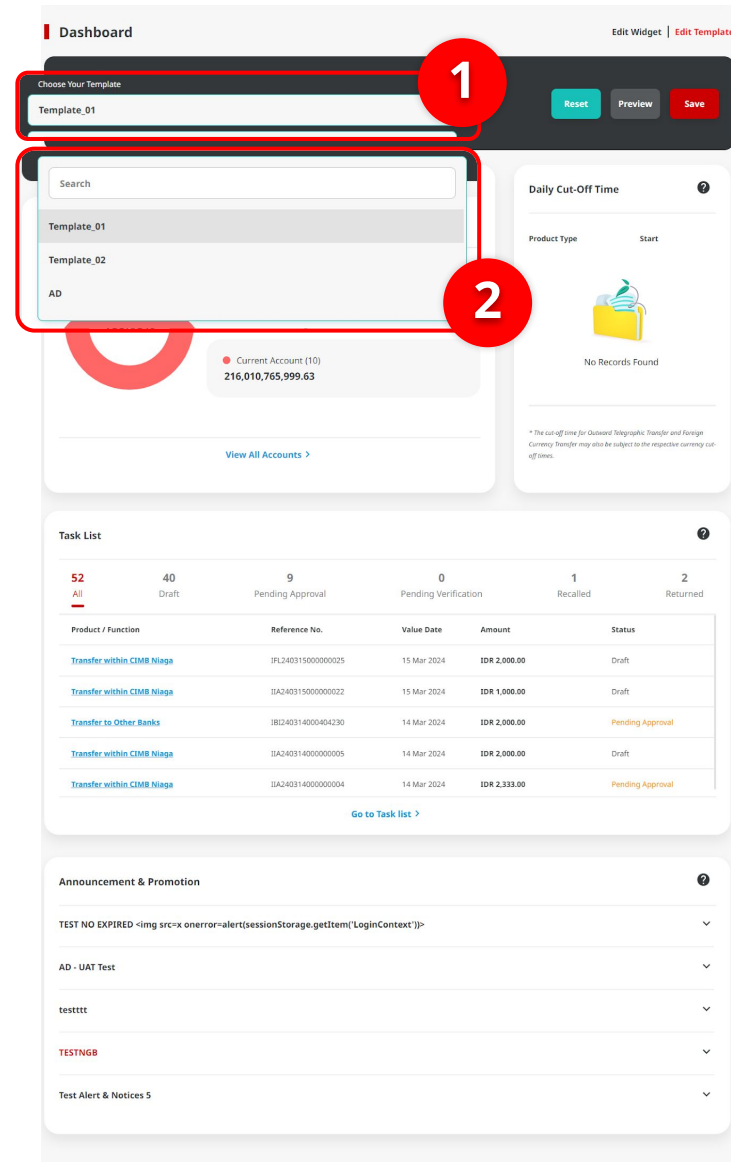
System will show the Dashboard page

1 Scroll kebawah, Klik **Edit Template**

Scroll down, click Edit Template

LANGKAH

04



System akan menampilkan halaman **Edit**

*System will show the **Edit** page*

- 1 Klik **Select Template Dropdown List**

*Click **Select Template Dropdown list***

- 2 Pilih **Template** jika terdapat **opsi lain yang tersedia**

*Choose **Template** if there are more than one template option*

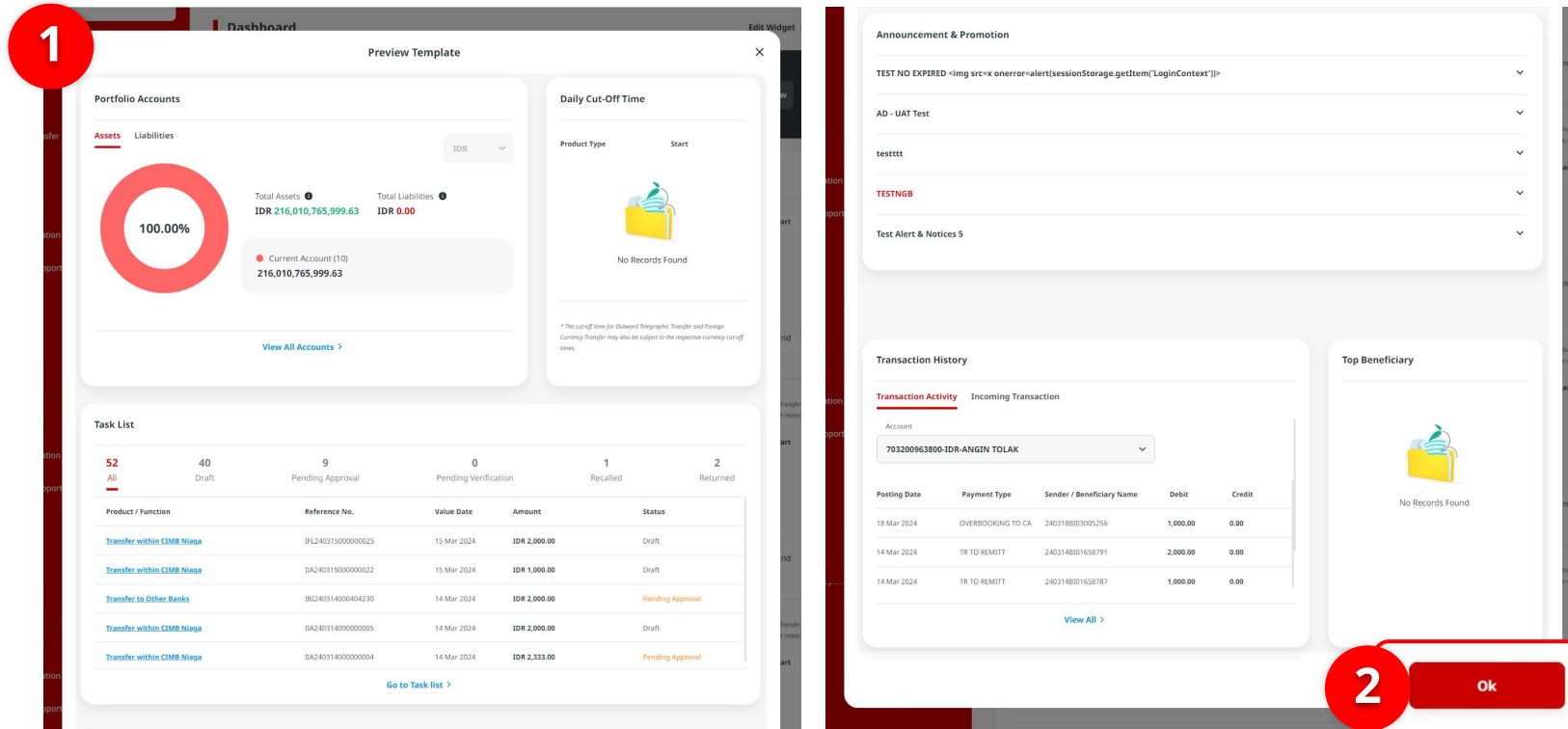
The screenshot shows a dashboard interface with the following components:

- Header:** "Dashboard" on the left, "Edit Widget | Edit Template" on the right.
- Template Selection:** A dropdown menu labeled "Choose Your Template" with "Template_02" selected. A "Reset" button is to the left, and a "Preview" button is to the right, highlighted with a red circle and the number "1".
- Portfolio Accounts:** A card showing a donut chart at 100.00%. It lists "Total Assets" as IDR 216,010,765,999.63 and "Total Liabilities" as IDR 0.00. A sub-section for "Current Account (10)" shows a value of 216,010,765,999.63. A "View All Accounts" link is at the bottom.
- Daily Cut-Off Time:** A card with a "Product Type" dropdown set to "Start" and a "No Records Found" message.
- Task List:** A card with a summary bar showing 52 total tasks, broken down into Draft (40), Pending Approval (9), Pending Verification (0), Recalled (1), and Returned (2). Below is a table of tasks.

Product / Function	Reference No.	Value Date	Amount	Status
Transfer within CIMB Niaga	IFL24031500000025	15 Mar 2024	IDR 2,000.00	Draft
Transfer within CIMB Niaga	IIA24031500000022	15 Mar 2024	IDR 1,000.00	Draft
Transfer to Other Banks	IBI240314000404230	14 Mar 2024	IDR 2,000.00	Pending Approval
Transfer within CIMB Niaga	IIA240314000000005	14 Mar 2024	IDR 2,000.00	Draft
Transfer within CIMB Niaga	IIA240314000000004	14 Mar 2024	IDR 2,333.00	Pending Approval

1 Klik tombol **Preview** untuk melihat **Dashboard**

*Click **Preview** to see the **Dashboard***

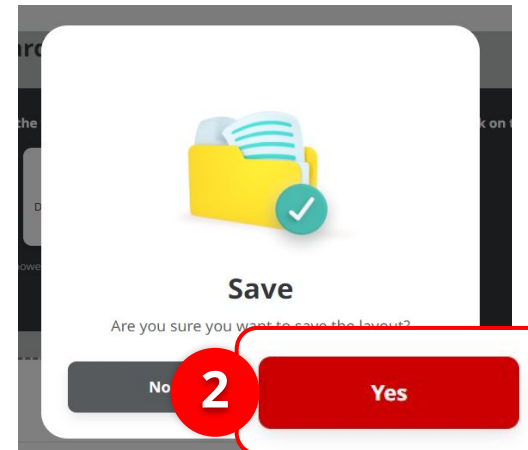
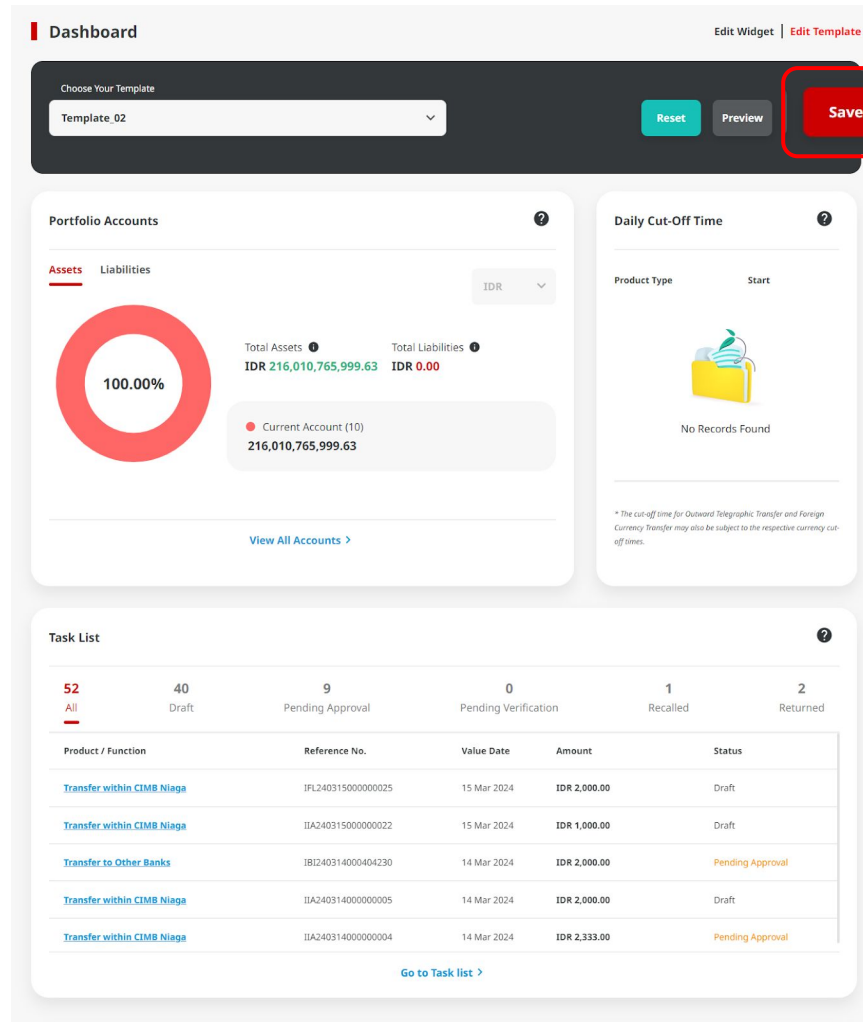


1 Sistem akan menampilkan **Pop-up preview template**

*System will show the **Preview Template** pop up*

2 Klik **OK** untuk **menutup preview Box**

*Click **OK** to close the **Preview Box***



System akan kembali mengarahkan ke halaman **User Dashboard**

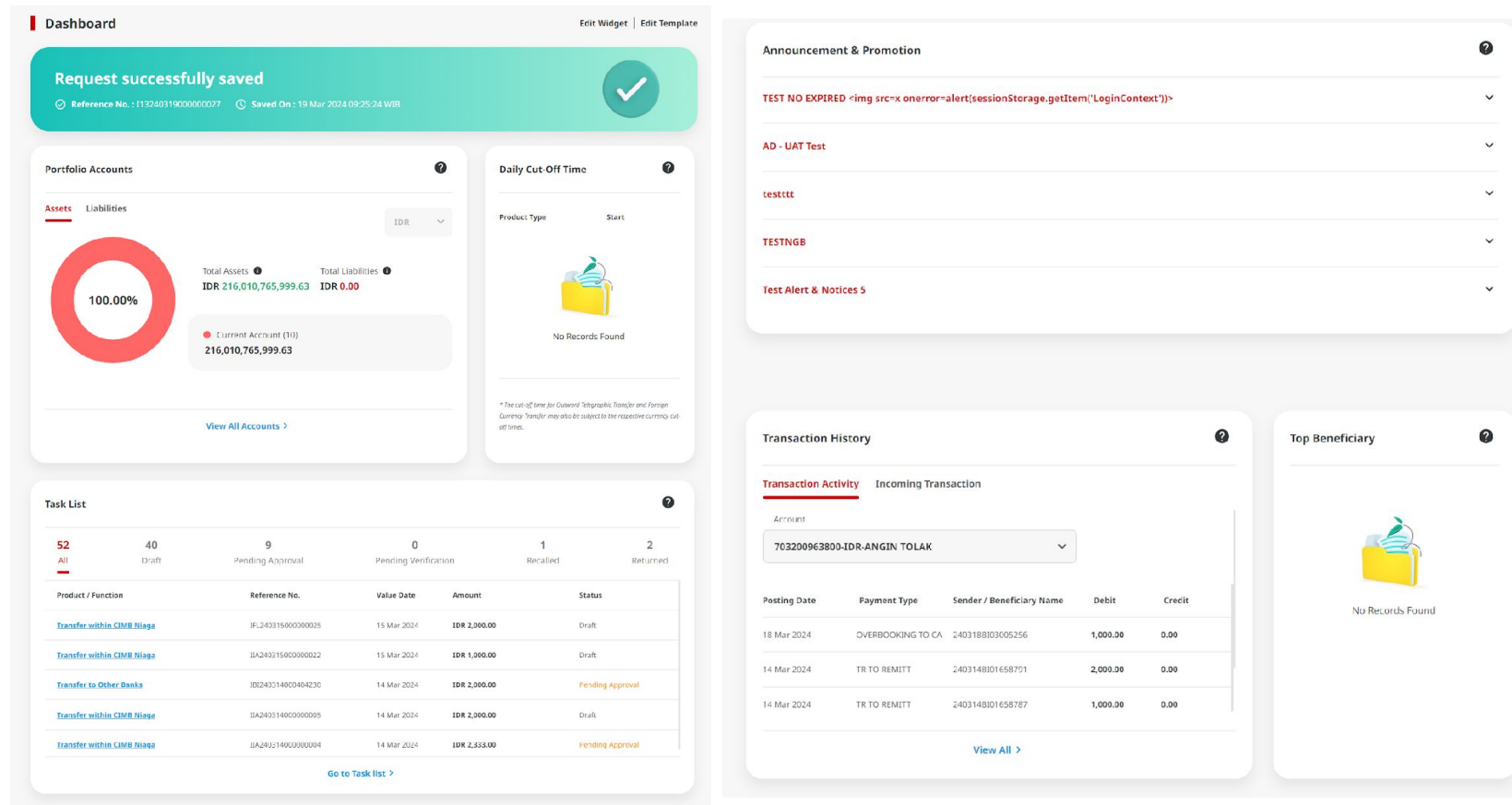
System will show **User Dashboard** page

1 Klik **Save**

Click **Save**

2 Klik **Yes**

Click **Yes**



Sistem akan menampilkan halaman **Dashboard** dengan pesan **Acknowledgement**

*System will show the **Dashboard** with the **Acknowledgement pop up***



OCTOBIZ

BY  CIMB NIAGA

