

# ONLINE ACCOUNT MANAGEMENT

## CUSTOMER GUIDE

**MANAGE YOUR ACCOUNT.  
MANY WAYS.  
ANYWHERE.  
ANYTIME.**



**LOG IN OR REGISTER**

**IT'S EASY TO MANAGE YOUR ACCOUNT ONLINE.**

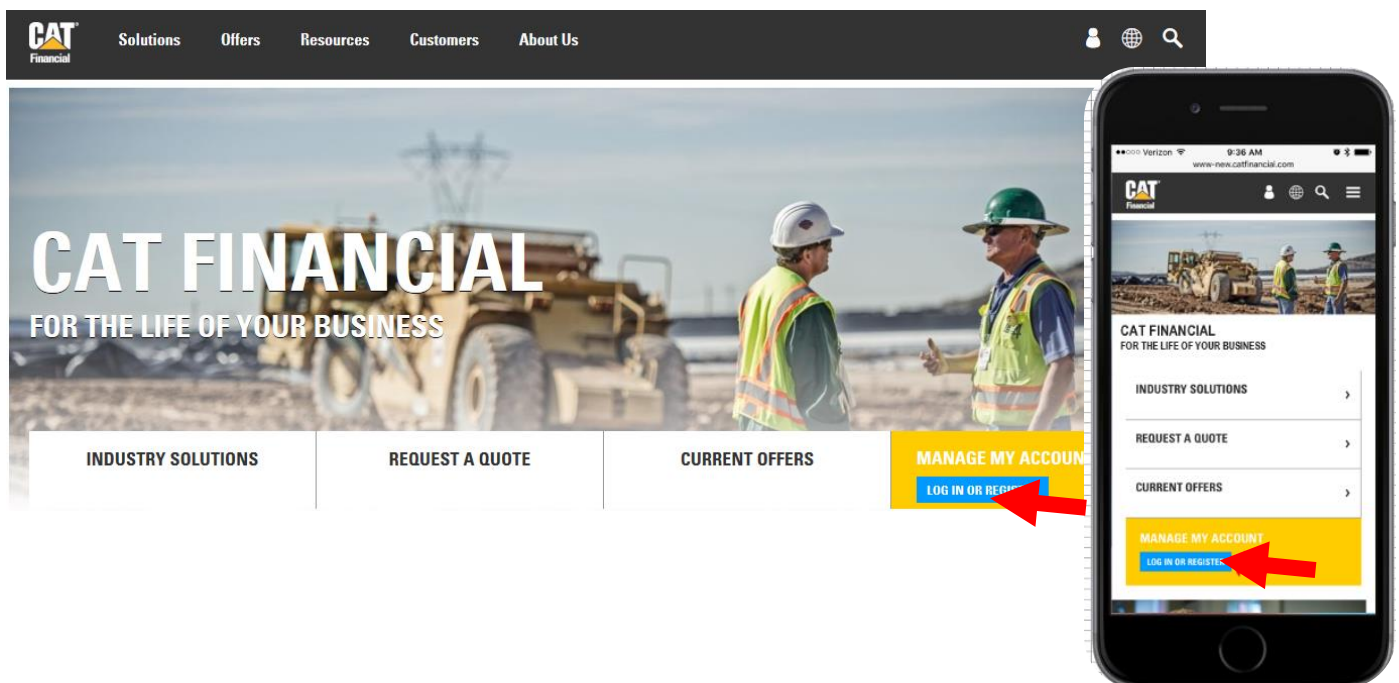
This guide will provide you with an overview of online account management from Cat Financial. It offers helpful step-by-step instructions to register and manage your account anytime, anywhere, and on any device, 24/7.

Our new online account management has a responsive design, which means you can easily view and access all the functions of your account on your desktop, tablet or mobile phone.

- 
- > Access all your accounts 24/7
  - > View contract summaries
  - > View payment history & open items
  - > Chat with a customer service representative
  - > Mobile-friendly, responsive design
  - > Request a settlement figure
  - > Make changes to account information

# CREATE YOUR ONLINE ACCOUNT

To create your Cat Financial online account, visit [catfinancial.com](http://catfinancial.com) and click **Log in** or **Register** in the blue box. You can also access your account directly at [online.catfinancial.com](http://online.catfinancial.com) from your desktop, tablet or smartphone.



When you go to register your account, you will first have to select your country and language. If this page does not automatically pop up, you can access it by clicking the globe in the top right corner of the page.

The image shows a desktop browser window and a mobile phone displaying the 'Select Language' page of the CAT Financial website. The desktop page has a dark header with the CAT Financial logo, a home icon, a globe icon, and a phone icon. The main content area is titled 'Select Language' and includes a dropdown menu for 'Region/Office' set to 'All'. Below this, there are sections for 'Asia' and 'Europe' with a table of language options. A red arrow points to the 'English' link under the 'NETHERLANDS | Nederlands' row in the Europe section. The mobile phone screen shows the same interface, with a red arrow pointing to the 'English' link under the 'NETHERLANDS | Nederlands' row.

**Select Language**

Select the Region to filter the languages available.

Region/Office  
All

Asia	
CHINA   中国	简体中文   English
JAPAN   日本	日本語   English

Europe	
IRELAND	English
NETHERLANDS   Nederlands	English   Nederlands
OMAN	English
UAE	English
UK	English

Once you have selected your country and language, you will be redirected to the online account management homepage. If you are registering your account for the first time, click **Register** in the blue box. Your previous AccountExpress log in will NOT work in this new system. Please register as a new user.



## Customers

Welcome to My Account, Cat Financial's account management system.

Whenever and wherever, you can browse through a variety of electronic devices and manage your account information. My Account is now compatible for mobile phones and tablet computers. Please register or login.

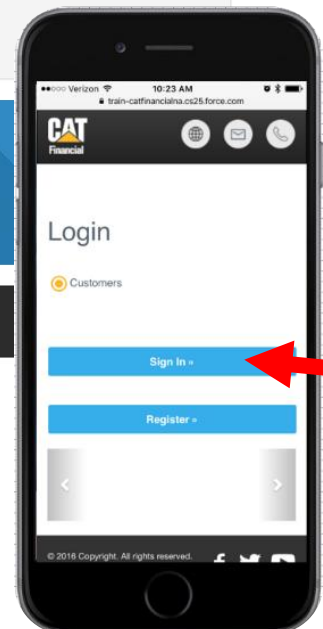
[Sign In »](#)

[Register »](#)

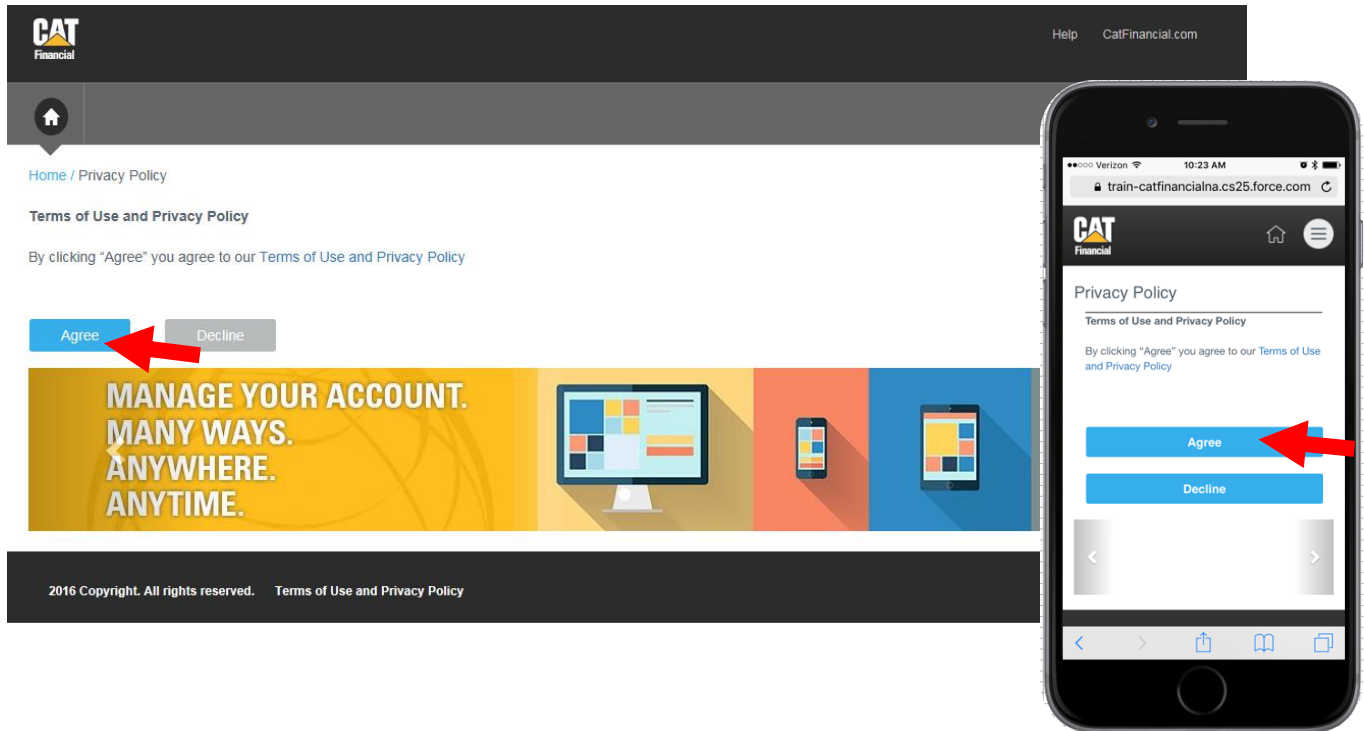
MANAGE YOUR ACCOUNT.  
MANY WAYS.  
ANYWHERE.  
ANYTIME.



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The next screen will ask you to accept our online Terms of Use and Privacy Policy. This statement governs the collection and use of information through this Cat Financial website. Click **Agree** to proceed to online account management.



Once you have agreed to the Terms of Use and Privacy Policy, you may begin to build your online account. Under the heading Account Verification you will select your account type, **Lease or Loan Contract**.

Privacy

Account Verification

User Setup

Confirmation

### Manage your Cat Financial account online.

Features and benefits of your Cat Financial online account:

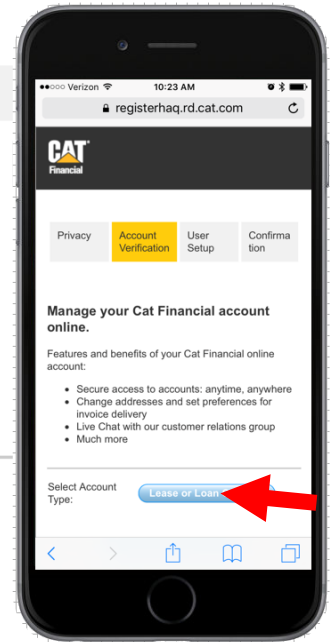
- Secure access to accounts: anytime, anywhere
- Change addresses and set preferences for invoice delivery
- Live Chat with our customer relations group
- Much more

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Select Account Type:

Lease or Loan Contract

[Need help? Please contact us](#)



To register your account, you will need your contract number, equipment serial number and the commencement date. This information can be found in the welcome letter you should have received via mail, or in a welcome email from Cat Financial, sent after contract booking.

If you cannot locate your current contract number, please contact our Customer Service team at **+44 (0) 1564 786504 Monday – Friday 8.30am – 5.00pm.**

PrivacyAccount VerificationUser SetupConfirmation

### Manage your Cat Financial account online.

Features and benefits of your Cat Financial online account:

- Secure access to accounts: anytime, anywhere
- Change addresses and set preferences for invoice delivery
- Live Chat with our customer relations group
- Much more

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Select Account Type:

Lease or Loan Contract

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All fields are required.

Enter a Contract Number:

Enter the serial number of any piece of equipment that is found on this contract:

Enter Commencement Date :

Month :

1 - January

Year :

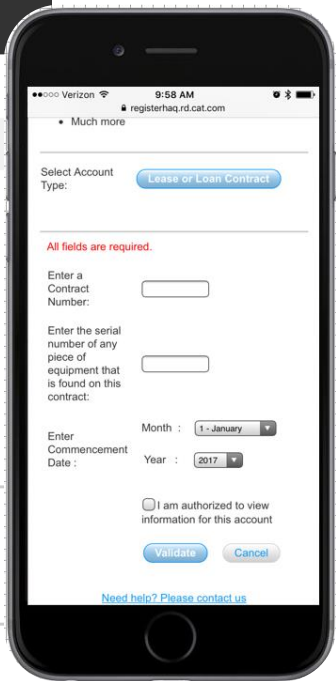
2017

☐ I am authorized to view information for this account

Validate

Cancel

[Need help? Please contact us](#)



# MANAGE YOUR ACCOUNT

Once you have successfully registered your account, you will see your contract listed on your Account Summary page.

The screenshot displays the CAT Financial web application interface. The top navigation bar includes the CAT Financial logo, a home icon, and links for Home, Lease/Loan Contracts, and Forms. The main content area is titled "Account Summary" and "Lease/Loan Contract". A table lists the contract details, with the first row highlighted by a red arrow pointing to the contract number 123-4567890. To the right, a mobile app interface is shown, displaying the same "Lease/Loan Contract" information, with a red arrow pointing to the contract number 123-4567890.

Contract	Assets	Payment Due Date	Commencement Date
123-4567890	1	13/10/16	13/10/16
123-4567890	1	05/11/16	05/10/16
123-4567890	2	30/10/16	30/09/16
123-4567890	1	27/10/16	27/09/16
123-4567890	1	14/10/16	22/09/16



When you click on one of your listed contracts, you will see the individual contract summary. Here you will find information such as terms, payment dates and the termination date for the equipment listed at the bottom of the page.

**CAT Financial** Help CatFinancial.com Welcome !

Home Lease/Loan Contracts Forms

Home / Lease/Loan Contracts / Contract Summary

### Contract Summary

View All >

Contract - 123-4567890  
Contract Details - CUSTOMER NAME

Contract Menu

- Contract Summary
- Open Item Details
- Payment History

Contract Number: 123-4567890

Term in Months: 24

Payment Due Date: 13/10/16

Last Payment Date: 11/10/16

Final Payment Date: 13/09/18

Search

View 5 per page

Model	Description
320EL	320EL NAZ LG/MED TRACK EXCAVATORS

Equipment

Serial Number: 123456ABC

Model: 123456A

Description: TRACK EXCAVATORS

The page navigation enables three different account features. You can view Open Item Details and Payment History (both pictured below), in addition to your contract summary, by clicking the boxes highlighted below.

The image displays two screenshots of the CAT Financial web application interface, illustrating the navigation between different account features. A mobile phone is overlaid on the left, showing the same interface as the desktop version.

**Top Screenshot: Open Item Details**

The top screenshot shows the 'Open Item Details' page for Contract 123-4567890. The page includes a 'Contract Menu' on the right with three options: 'Contract Summary', 'Open Item Details' (highlighted with a red box), and 'Payment History'. The main content area features a date range filter, a search bar, and a table with columns: 'Line Tax', 'Total Due', 'Line Type', 'Applied', and 'Remaining'. The table currently displays 'No data available'.

**Bottom Screenshot: Payment History**

The bottom screenshot shows the 'Payment History' page for the same contract. The 'Contract Menu' on the right has 'Payment History' highlighted with a red box. The main content area includes a date range filter, a search bar, and a table with columns: 'Due Date', 'Receipt Date', 'Payment Method', 'Applied Amount', and 'Item'. The table displays one payment record:

Due Date	Receipt Date	Payment Method	Applied Amount	Item
13/10/16	11/10/16	123-4567890	GBP 1,447.13	RENTAL

**Mobile Phone Overlay:**

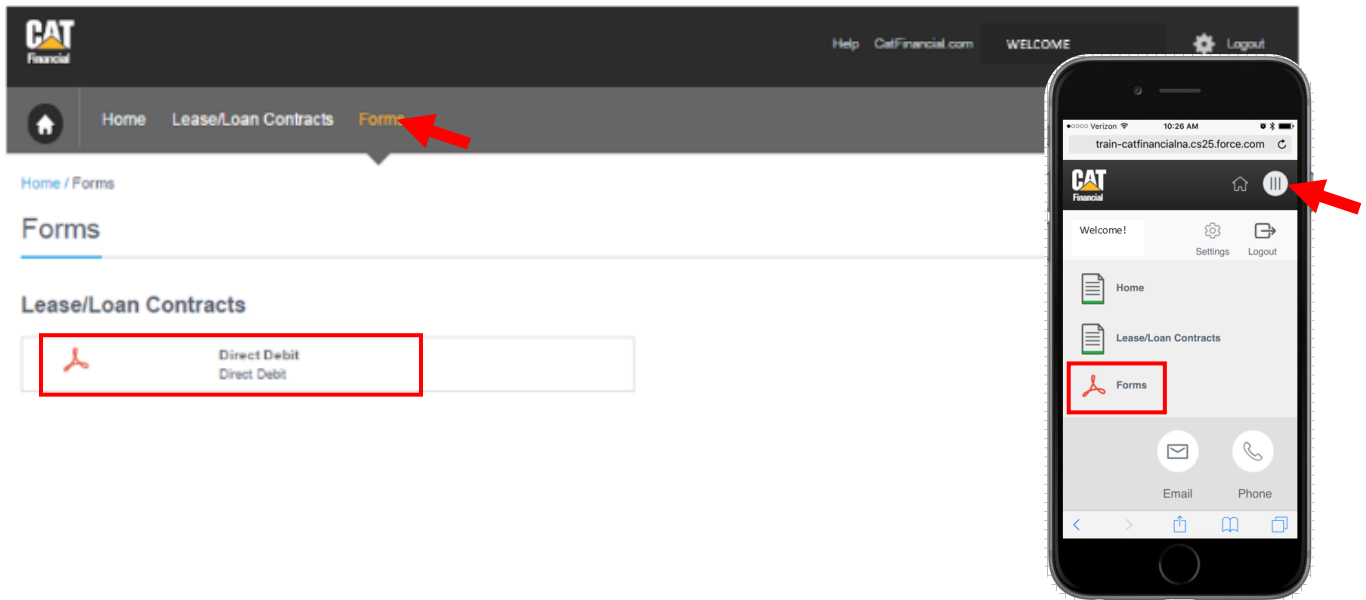
The mobile phone overlay shows the same interface as the desktop version. The 'Contract Menu' on the right has 'Open Item Details' highlighted with a red box. The main content area displays the 'Contract Summary' details:

- Customer Number: 1234
- Term in Months: 24
- Last Payment Date: 11/10/16
- Termination Date: 12/10/18
- Commencement Date: 13/10/16
- Final Payment Date: 13/09/18
- Payment Due Date: 13/10/16

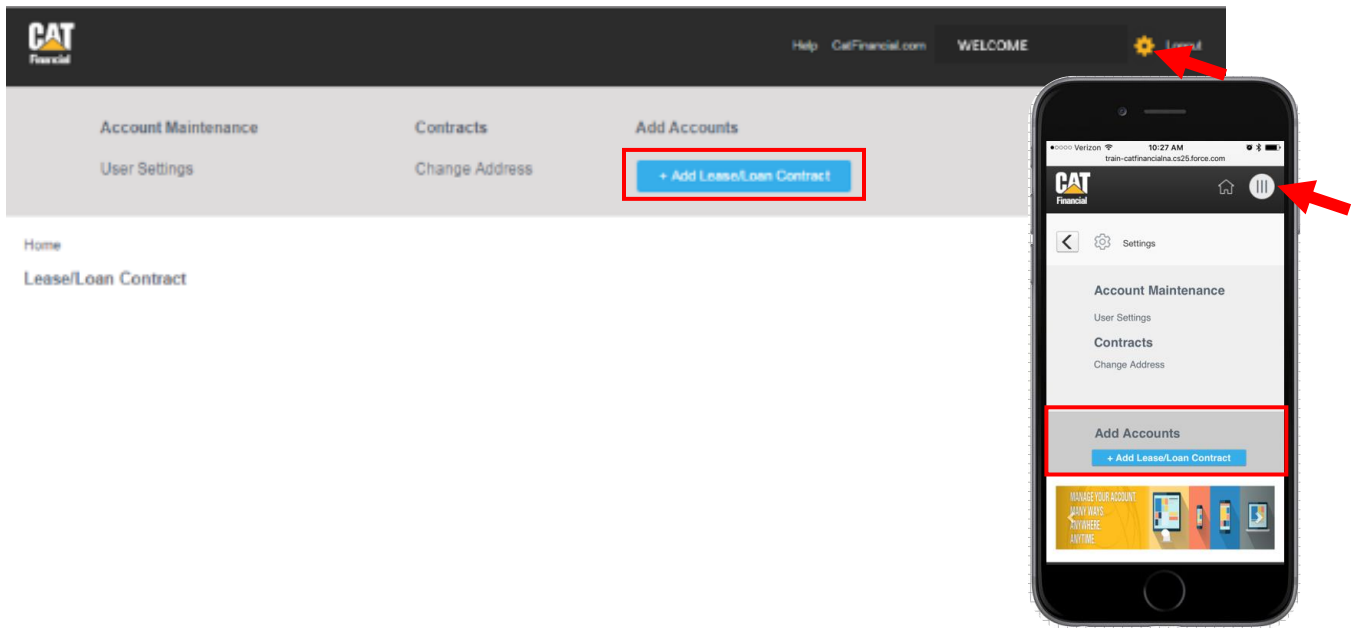
**Footer:**

Only the payments on invoices due in last 24 months will be displayed. Please contact our Customer Service Rep for more details.

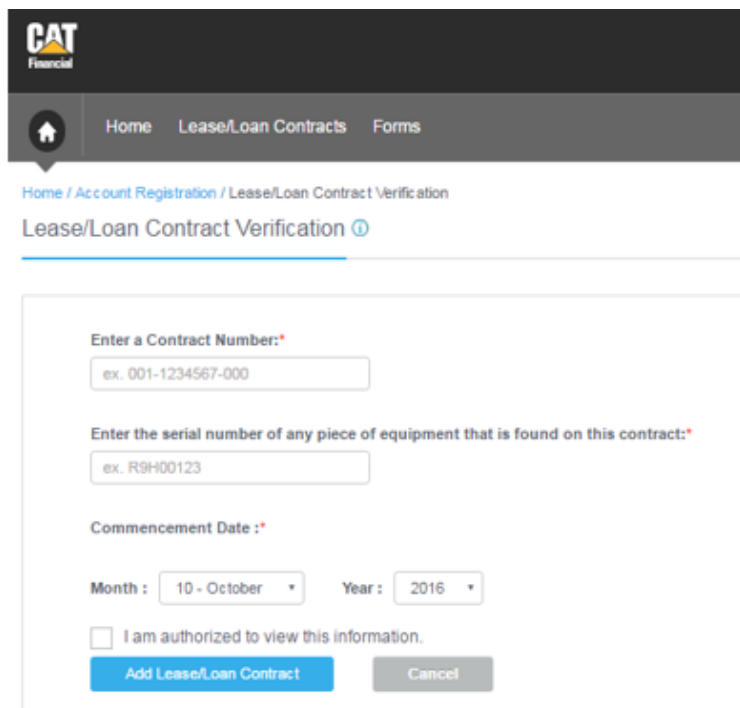
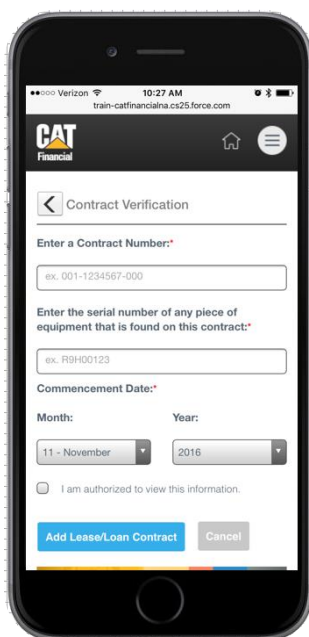
If you would like to register your account for Direct Debit, you can access the necessary form by clicking **Forms** in the top navigation.



To add additional contracts to your online account, click the settings gear in the top right corner.



You will be asked to enter the contract number, a serial number listed on the contract and the commencement date. You will need to manually add additional contracts once you have registered your account. These will not automatically update when you book a new contract.



You can view both active and inactive contracts by clicking Lease/Loan Contract in the navigation. Only contracts you have previously registered will be displayed in these lists.

The image displays the CAT Financial web application interface and its corresponding mobile app interface. The web application shows a navigation bar with 'Home', 'Lease/Loan Contracts', and 'Forms'. Below the navigation bar, there are two tabs: 'Active Contracts' and 'Inactive Contracts'. The 'Lease/Loan Contracts' section displays a table with columns: Contract, Assets, Payment Due Date, and Commencement Date. The mobile app interface shows a similar navigation bar and tabs for 'Active Contracts' and 'Inactive Contracts', with a list of contracts displayed below.

**Web Application Interface:**

Navigation: Home, Lease/Loan Contracts, Forms

Home / Lease/Loan Contracts

Active Contracts Inactive Contracts

**Lease/Loan Contracts**

Contract	Assets	Payment Due Date	Commencement Date
123456ABC	1	20/10/16	20/11/13
123456ABC	1	13/10/16	13/11/13
123456ABC	1	29/11/16	29/10/15
123456ABC	9	30/10/16	30/11/10
123456ABC	3	29/10/16	29/12/10

**Mobile App Interface:**

Navigation: Home, Lease/Loan Contracts, Forms

Active Contracts Inactive Contracts

Contract 123456A Payment Due Date 13/10/16

Contract 123456A Payment Due Date 05/11/16

Contract 123456A Payment Due Date 30/10/16

# UPDATE YOUR PERSONAL INFORMATION

To make updates to your personal information, click the settings gear at the top of the page. Click **User Settings** to update your personal information and email.

The image displays two versions of the CAT Financial user interface. On the left is a desktop web browser view. At the top, the CAT Financial logo is on the left, and 'Help CatFinancial.com WELCOME' with a gear icon and 'Logout' is on the right. Below this is a navigation bar with three sections: 'Account Maintenance' containing a red-bordered 'User Settings' button, 'Contracts' containing a 'Change Address' button, and 'Add Accounts' containing a '+ Add Lease/Loan Contract' button. Below the navigation bar is the 'Update Personal Information' form. It has six input fields: 'First Name\*' (with 'Customer' entered), 'Last Name\*' (with 'Name' entered), 'E-mail Address\*' (with 'Customer.email@email.com' entered), 'Re-enter E-mail Address\*' (with 'Customer.email@email.com' entered), 'Primary Language\*' (a dropdown menu with 'English' selected), and two buttons at the bottom: 'Submit' and 'Reset'.

On the right is a mobile app interface. It shows the same 'Update Personal Information' form. At the top of the app screen, there is a status bar with 'Verizon', '10:27 AM', and battery level. Below the status bar is the CAT Financial logo, a home icon, and a settings gear icon. A red arrow points to the settings gear icon. The form fields are identical to the desktop version, with the same text entered in each field.

To change your address, click **Change Address** in the navigation and complete the form below.

The image displays the 'Change Address' form on both a desktop web browser and a mobile app. The desktop version features a dark header with the CAT Financial logo, navigation links (Home, Lease/Loan Contracts, Forms), and user information (Help, CatFinancial.com, WELCOME, Logout). The form itself is titled 'Change Address' and includes a breadcrumb trail: 'Home / Settings and Preferences / Change Address'. Under the 'Address Type' section, there are three checkboxes: 'Business', 'Billing', and 'Equipment Location'. The 'Enter New Address' section contains six input fields: 'First Name\*', 'Last Name\*', 'E-mail Address\*', 'Re-enter E-mail Address\*', 'Phone:', and 'Street:'. Below this is the 'All Contracts' section with a statement 'This address change applies to all of my contracts' and two radio buttons for 'Yes' (selected) and 'No'. At the bottom are 'Submit' and 'Cancel' buttons. The mobile app version, shown on the right, mirrors the desktop form but is enclosed in a red rectangular box, highlighting the form fields.

**Desktop Form Structure:**

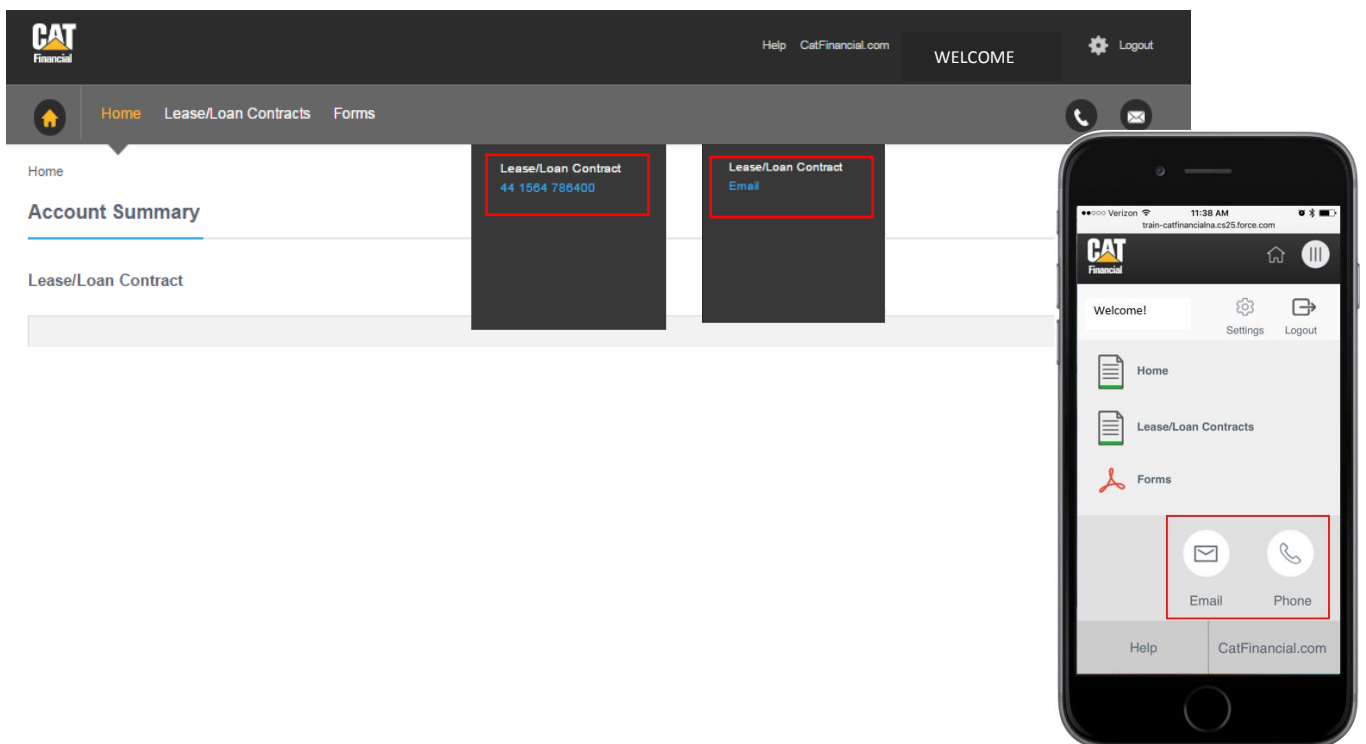
- Header:** CAT Financial, Help, CatFinancial.com, WELCOME, Logout
- Navigation:** Home, Lease/Loan Contracts, Forms
- Breadcrumb:** Home / Settings and Preferences / Change Address
- Section:** Change Address
- Address Type:**
  - ☐ Business
  - ☐ Billing
  - ☐ Equipment Location
- Enter New Address:**
  - First Name\* (input field)
  - Last Name\* (input field)
  - E-mail Address\* (input field)
  - Re-enter E-mail Address\* (input field)
  - Phone: (input field)
  - Street: (input field)
- All Contracts:**
  - This address change applies to all of my contracts
  - ☒ Yes ☐ No
- Buttons:** Submit, Cancel

**Mobile App Form Structure:**


- Header:** CAT Financial, Home, Menu
- Section:** Change Address
- Address Type:**
  - ☐ Business
  - ☐ Billing
  - ☐ Equipment Location
- Enter New Address:**
  - First Name\* (input field)
  - Last Name\* (input field)
  - E-mail Address\* (input field)
  - Re-enter E-mail Address\* (input field)

# CONTACT US


If you have questions or experience issues accessing your account information, please contact us by phone at **+44 1564 786400** or email us by clicking the email icon in the upper right corner. Customer Service representatives may also be available via chat during business hours. The icon will appear in the menu when representatives are available.







HelpCatFinancial.comWELCOMELogout

HomeLease/Loan ContractsForms

Home / Contact Us: Lease/Loan Contracts

Contact Us: Lease/Loan Contracts

E-mail Form

Name \*

Customer Name

E-mail Address \*

Customer Email


Phone Number \*

Purpose \*



Account Information

Message \*

Submit



train-catfinancialna.cs25.force.com



Contact Us: Lease/Loan Contracts

E-mail Form

Name \*

Customer Name

E-mail Address \*

Customer Email

Phone Number \*

Purpose \*

Account Information

Message \*

You can also review frequently asked questions by clicking the **Help** link at the top right of the screen. If you have any questions not answered by this guide, please call our team at **+44 1564 786400**.

