

MyCatFinancial Account Management

CUSTOMER GUIDE

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



LOG IN OR REGISTER

IT'S EASY TO MANAGE YOUR ACCOUNT ONLINE.

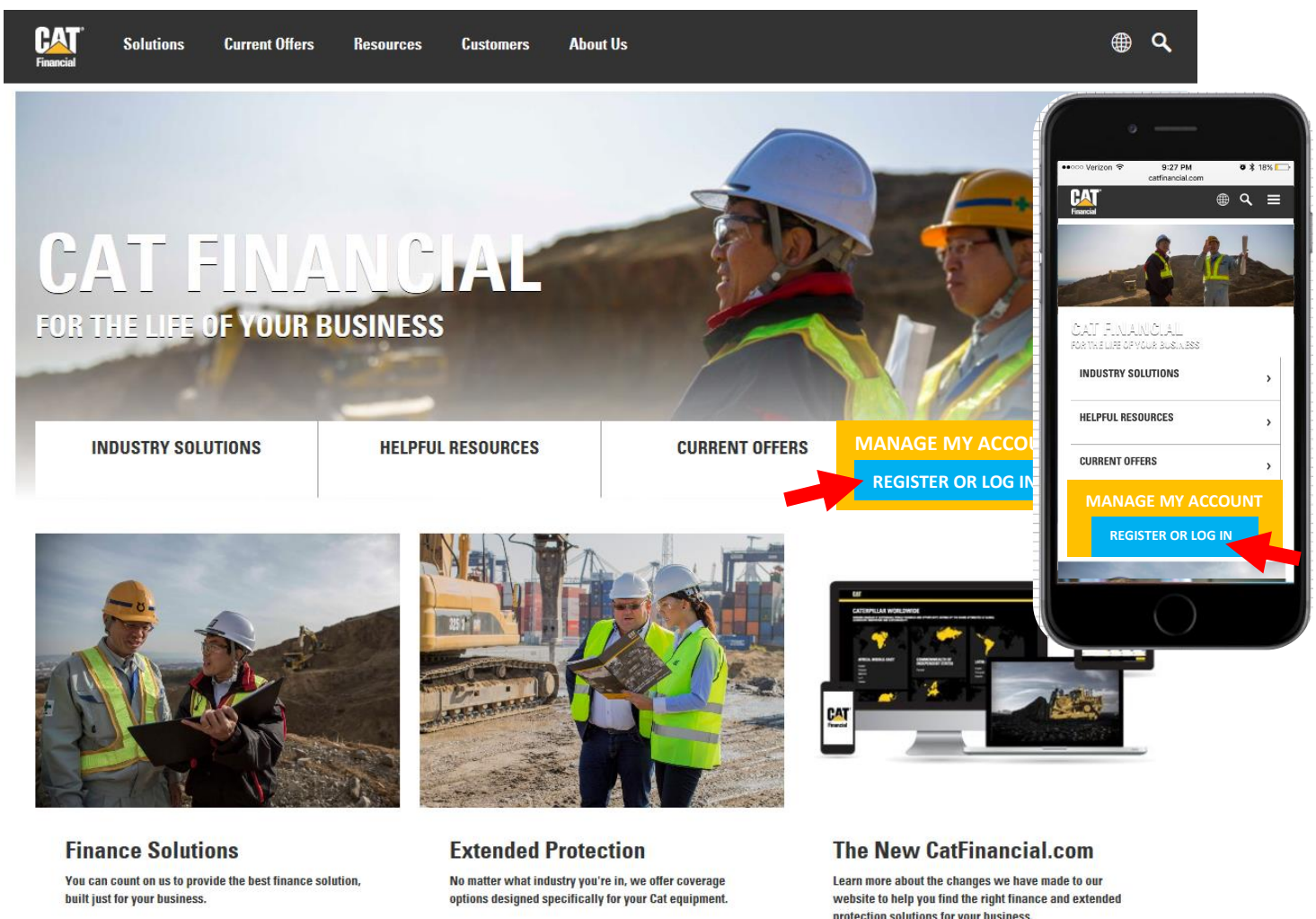
This guide will provide you with an overview of online account management from Cat Financial. It offers helpful step-by-step instructions to register and manage your account anytime, anywhere, and on any device, 24/7.

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
 - > Request a buyout
 - > Make changes to account information
 - > Mobile-friendly, responsive design

CREATE YOUR ONLINE ACCOUNT

To create your MyCatFinancial online account, visit catfinancial.com and click **Log in** or **Register** in the blue box from your desktop, tablet or smartphone.



The image displays the Cat Financial website interface across multiple devices. At the top, a dark navigation bar contains the CAT Financial logo and links for Solutions, Current Offers, Resources, Customers, and About Us. A search icon is also present. The main banner features the text "CAT FINANCIAL FOR THE LIFE OF YOUR BUSINESS" over a background image of construction workers. Below the banner, a horizontal menu includes "INDUSTRY SOLUTIONS", "HELPFUL RESOURCES", "CURRENT OFFERS", and "MANAGE MY ACCOUNT". The "MANAGE MY ACCOUNT" link is highlighted in blue and contains the text "REGISTER OR LOG IN". A red arrow points from this link to a smartphone screen on the right, which shows the same website layout. Below the main banner, there are three columns of content: "Finance Solutions" with a photo of two workers, "Extended Protection" with a photo of a worker and a Cat machine, and "The New CatFinancial.com" with a photo of a laptop and a smartphone displaying the website. Each column has a brief description of the service.

Finance Solutions
You can count on us to provide the best finance solution, built just for your business.

Extended Protection
No matter what industry you're in, we offer coverage options designed specifically for your Cat equipment.

The New CatFinancial.com
Learn more about the changes we have made to our website to help you find the right finance and extended protection solutions for your business.

When you go to register your MyCatFinancial 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 screenshot shows the 'Select Language' page on the MyCatFinancial website. The page has a dark header with the CAT Financial logo and a 'Help' link. Below the header, there's a navigation bar with a home icon, a globe icon, and a phone icon. The main content area is titled 'Select Language' and contains a dropdown menu for 'Region/Office' set to 'All'. Below this, there's a table of available languages for different regions. A red arrow points to the 'English' option for the 'MALAYSIA' region. To the right, a mobile phone displays the same interface, with a red arrow pointing to the 'English' option for the 'MALAYSIA' region.

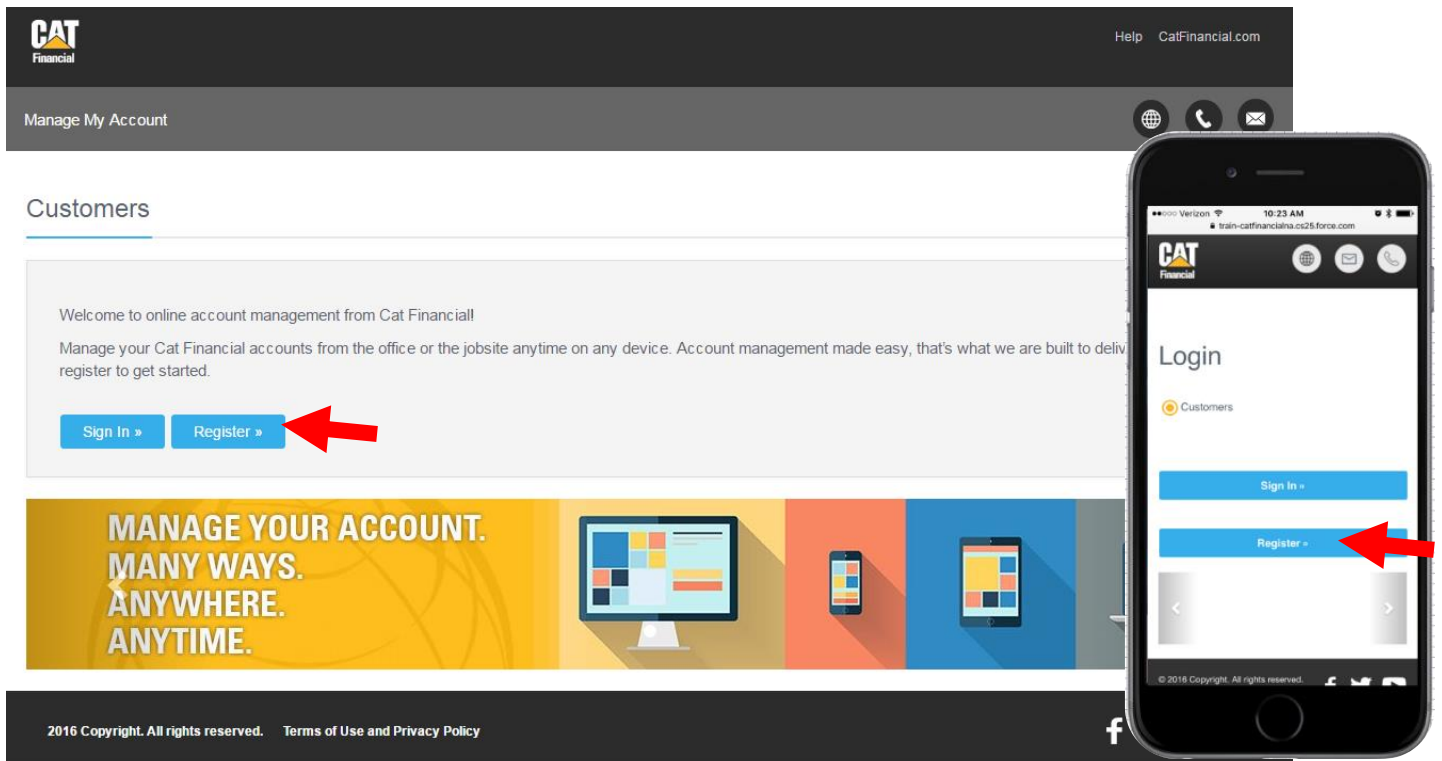
Select the Region to filter the languages available.

Region/Office

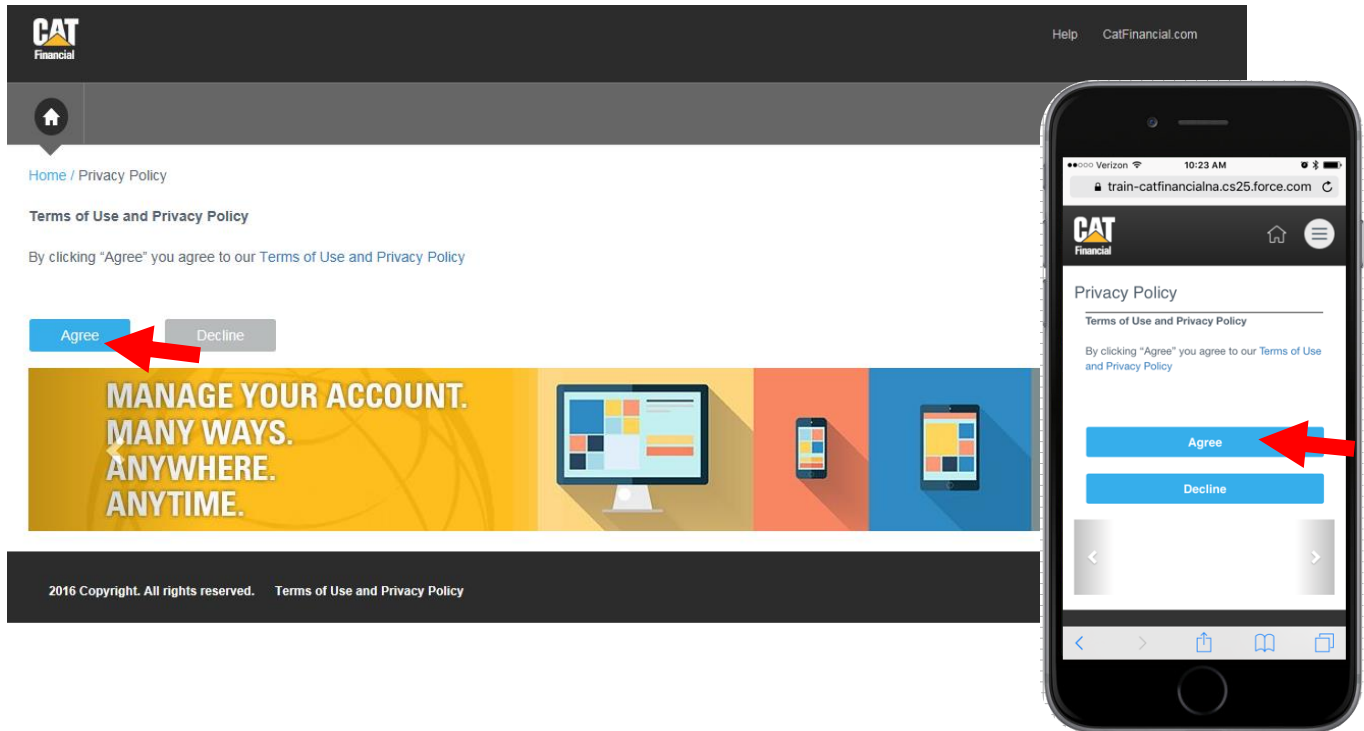
All

Asia	
CHINA 中国	简体中文
JAPAN 日本	日本語
MALAYSIA	English
PHILIPPINES	English
SINGAPORE	简体中文 English
THAILAND	ไทย English

Once you have selected your country and language, you will be redirected to the MyCatFinancial homepage. If you are registering your account for the first time, click **Register** in the blue box.



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 continue registering your MyCatFinancial 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.

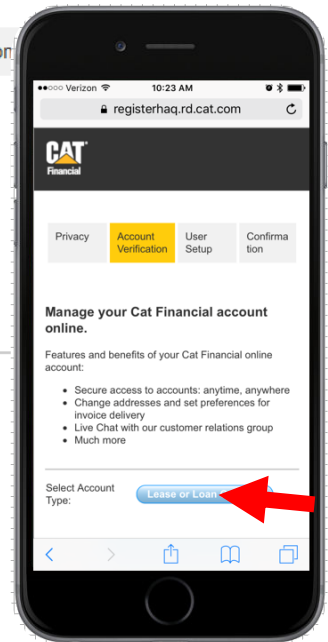
Features and benefits of your Cat Financial online account:

- Secure access to accounts: anytime, anywhere
- Change addresses and set preferences for invoice delivery
- Much more

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 **+603-8074 5600** Monday – Friday 8.30am – 5.00pm.

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
- Much more

Select Account Type:

Lease or Loan Contract

All fields are required.

Enter a Contract Number:

Enter the serial number or customer ID:

Enter Commencement Date :

Month : 1 - January

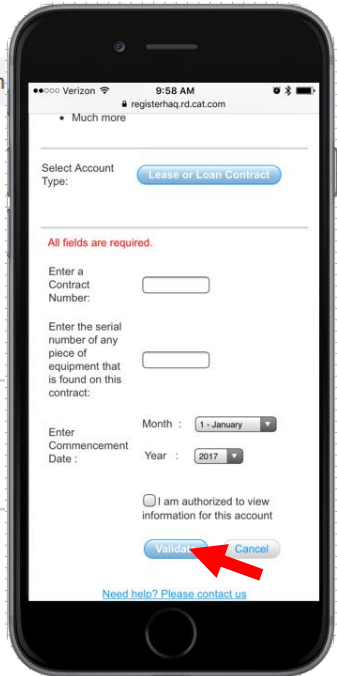
Year : 2018

☐ 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 MyCatFinancial 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 'Help' link, and the website URL 'CatFinancial.com'. Below the navigation bar, the 'Home' button is selected. The main content area is titled 'Account Summary' and shows a section for 'Lease/Loan Contract'. A table lists the contracts with columns for Contract, Assets, Payment Due Date, and Commencement Date. A red arrow points to the contract number 123-4567890 in the first row of the table. To the right, a mobile app interface is shown, displaying the same 'Lease/Loan Contract' section. A red arrow points to the contract number 123-4567890 in the mobile app view.

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

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, with a mobile app interface overlaid on the left side.

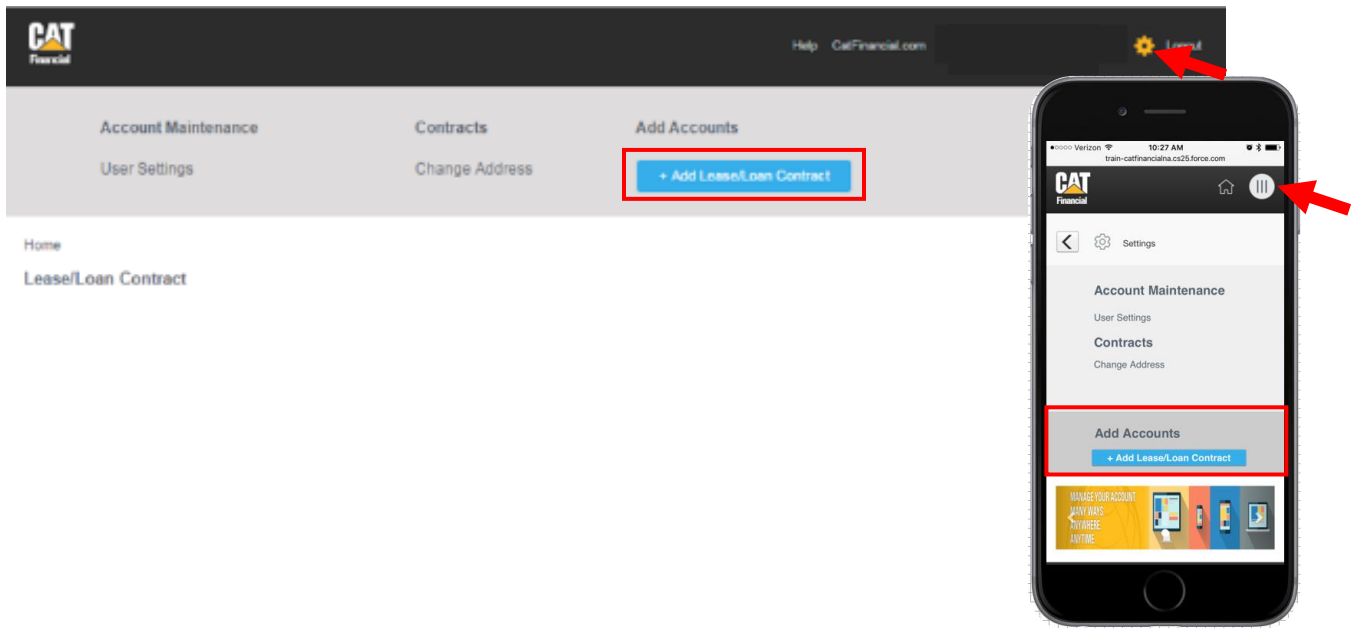
Top Screenshot (Open Item Details):

- Header:** CAT Financial logo, Help, CatFinancial.com, Logout.
- Navigation:** Home, Lease/Loan Contracts, Forms.
- Breadcrumbs:** Home / Lease/Loan Contracts / Open Item Details.
- Section Header:** Open Item Details (with a View All > button).
- Contract Info:** Contract - 123-4567890, Contract Details - CUSTOMER NAME.
- Contract Menu:** Contract Summary, Open Item Details (highlighted with a red box), Payment History.
- Form:** Please choose a date range for date filtering. Start Date: [input field with calendar icon], End Date: [input field with calendar icon]. Buttons: Apply Filter, Reset.
- Table:** Table with columns: Line Tax, Total Due, Line Type, Applied, Remaining. Content: No data available.
- Mobile App Overlay:** Shows the same interface on a smartphone. The Contract Summary dropdown is highlighted with a red box, showing options: Contract Summary, Open Item Details, Payment History, and HOLDINGS LIMITED.

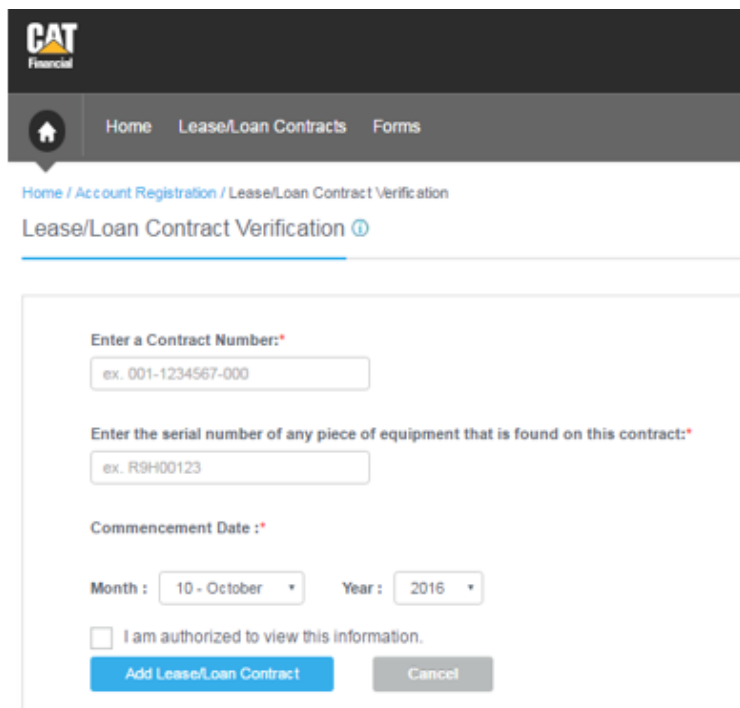
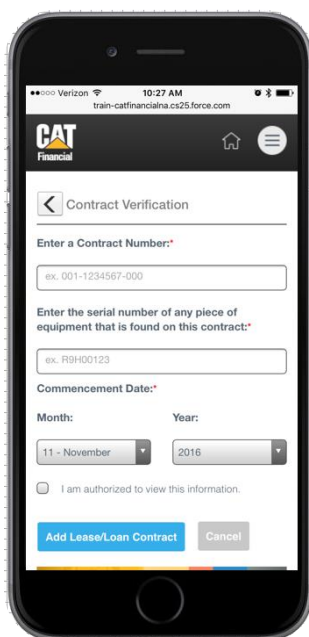
Bottom Screenshot (Payment History):

- Header:** CAT Financial logo, Help, CatFinancial.com, Logout.
- Navigation:** Home, Lease/Loan Contracts, Forms.
- Breadcrumbs:** Home / Lease/Loan Contracts / Payment History.
- Section Header:** Payment History (with a View All > button).
- Contract Info:** Contract - 123-4567890, Contract Details - CUSTOMER NAME.
- Contract Menu:** Contract Summary, Open Item Details, Payment History (highlighted with a red box).
- Form:** Please choose a date range for date filtering. Start Date: [input field with calendar icon], End Date: [input field with calendar icon]. Buttons: Apply Filter, Reset.
- Table:** Table with columns: Due Date, Receipt Date, Payment Method, Applied Amount, Item. Content: 13/10/16, 11/10/16, 123-4567890, GBP 1,447.13, RENTAL.
- Footer:** Only the payments on invoices due in last 24 months will be displayed. Please contact our Customer Service Rep for more details.

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.



Home / Lease/Loan Contracts

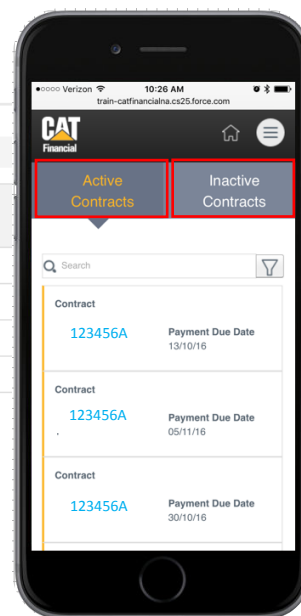
Active Contracts

Inactive Contracts

Lease/Loan Contracts

Search

▲ 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



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 the CAT Financial web interface and a mobile app view. The web interface shows the 'Update Personal Information' form with fields for First Name, Last Name, E-mail Address, and Primary Language. The 'User Settings' link is highlighted in the top navigation bar. The mobile app view shows the same form on a smartphone screen, with a red arrow pointing to the settings gear icon in the top right corner.

Web Interface:

- Top Bar: CAT Financial logo, Help, CatFinancial.com, Logout.
- Navigation Bar: Account Maintenance, Contracts, Add Accounts.
- Sub-Navigation Bar: User Settings (highlighted), Change Address, + Add Lease/Loan Contract.
- Form Title: Update Personal Information.
- Form Fields:
 - First Name*: Customer
 - Last Name*: Name
 - E-mail Address*: Customer.email@email.com
 - Re-enter E-mail Address*: Customer.email@email.com
 - Primary Language*: English
- Buttons: Submit, Reset.

Mobile App View:

- Top Bar: CAT Financial logo, Home icon, Settings gear icon (highlighted with a red arrow).
- Form Title: Update Personal Information.
- Form Fields:
 - First Name*: First
 - Last Name*: First
 - E-mail Address*: Customer Email
 - Re-enter E-mail Address*: Customer Email
 - Primary Language*: English

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, 'Help CatFinancial.com', and a 'Logout' button. A navigation bar includes 'Home', 'Lease/Loan Contracts', and 'Forms'. The breadcrumb trail shows 'Home / Settings and Preferences / Change Address'. The form title is 'Change Address'. Under 'Address Type', 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:*. At the bottom, the 'All Contracts' section states 'This address change applies to all of my contracts' with 'Yes' (selected) and 'No' radio buttons, and 'Submit' and 'Cancel' buttons. The mobile app version, shown on the right, mirrors the desktop form but is highlighted with a red border. The app's status bar shows 'Verizon', '10:27 AM', and the URL 'train-catfinancialna.cs25.force.com'.

Desktop Form Structure:

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

Mobile App Version: The mobile app interface is shown on the right, displaying the same 'Change Address' form with a red border highlighting the input fields and the 'All Contracts' section.

CONTACT US

If you have questions or experience issues accessing your account information, please contact us by phone at **+603-8074 5600** or email us by clicking the email icon in the upper right corner.

The image displays the CAT Financial website and its mobile application interface. The website header includes the CAT Financial logo, a 'Help' link, and the URL 'CatFinancial.com'. The navigation menu features 'Home', 'Lease/Loan Contracts', and 'Forms'. The main content area shows 'Account Summary' and 'Lease/Loan Contract' sections. Two red boxes highlight contact information: one with the phone number '+603-8074-5600' and another with a blue 'Email' link. The mobile app interface shows a 'Welcome!' screen with 'Settings' and 'Logout' options. A red box highlights the 'Email' and 'Phone' icons in the bottom navigation bar. Below this, the 'Contact Us: Lease/Loan Contracts' page is shown, featuring an 'E-mail Form' with fields for 'Name', 'E-mail Address', 'Phone Number', 'Purpose', and 'Message'. A red box highlights the 'Name' and 'E-mail Address' fields on the mobile app version of the form.

Website Contact Information:

- Phone: +603-8074-5600
- Email: [Email](#)

Mobile App Contact Information:

- Email: [Email](#)
- Phone: [Phone](#)

E-mail Form Fields:

- Name *
- E-mail Address *
- Phone Number *
- Purpose *
- 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 **+603-8074 5600**.

