

MyCatFinancial Account Management

CUSTOMER GUIDE

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



LOG IN OR REGISTER

IT'S EASY TO MANAGE YOUR ACCOUNT ONLINE.

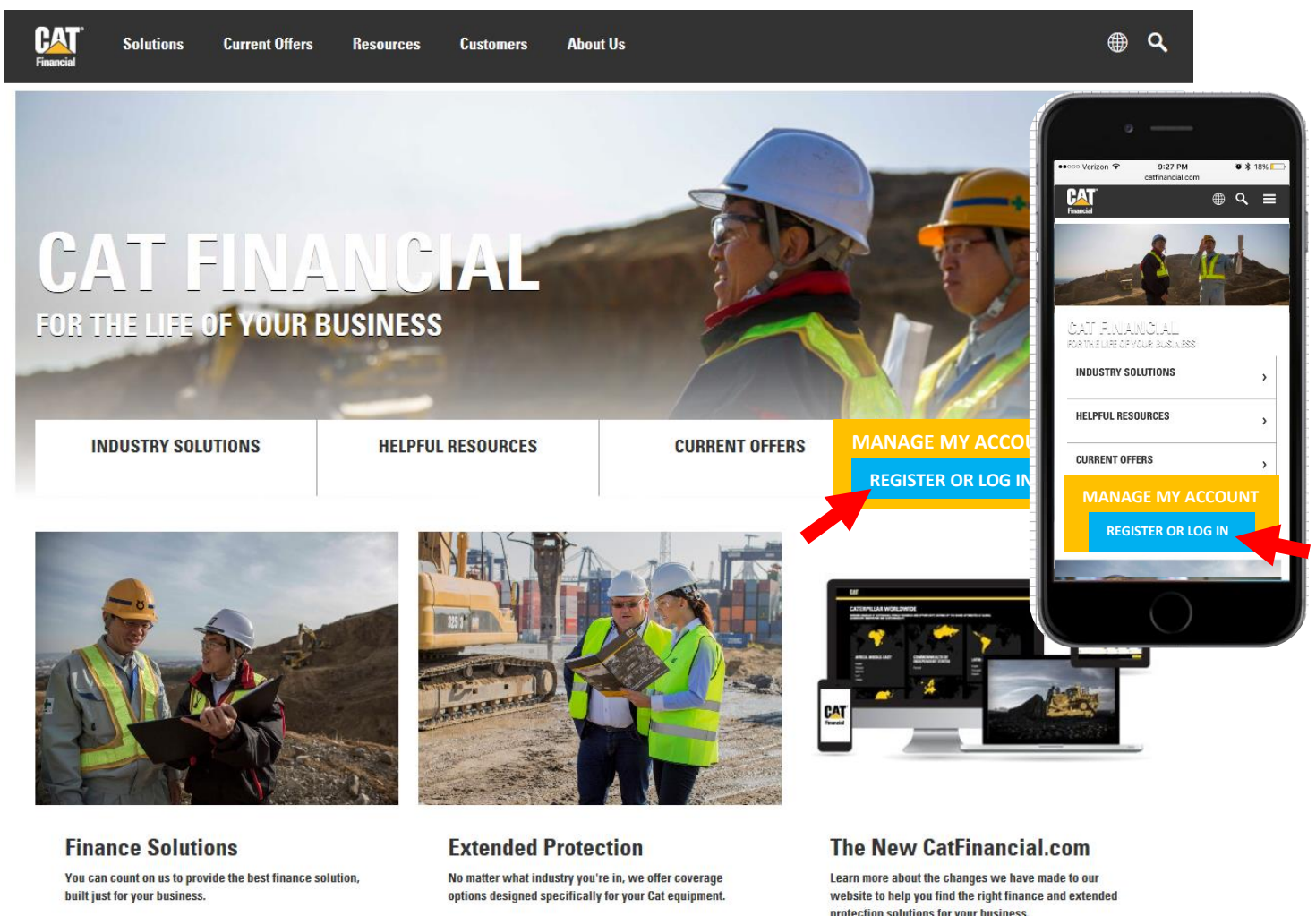
This guide will provide you with an overview of online account management from Cat Financial. It offers helpful step-by-step instructions to register and manage your account anytime, anywhere, and on any device, 24/7.

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.

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- > Access all your accounts 24/7
 - > View contract summaries
 - > View payment history & open items
 - > Request a buyout quote
 - > 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.



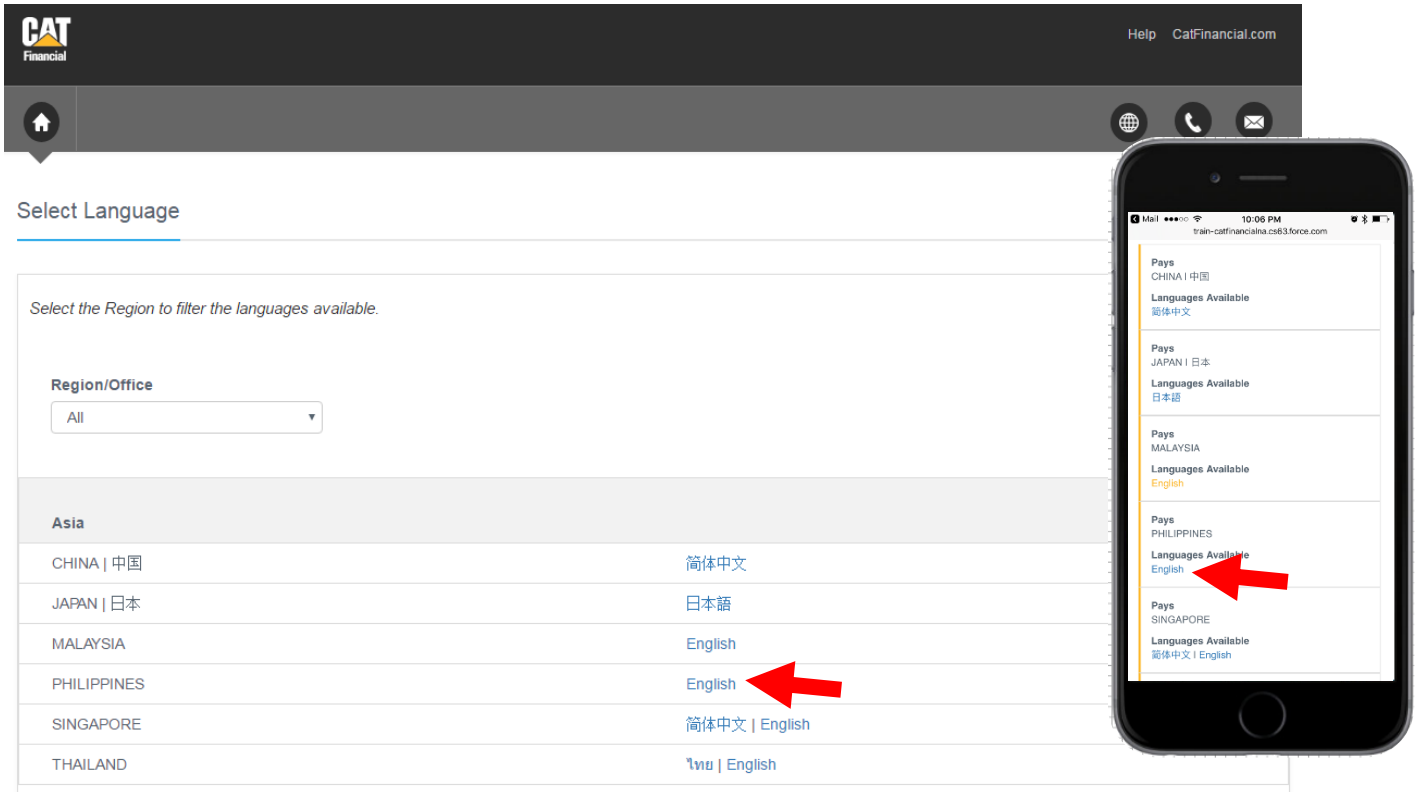
The image displays the Cat Financial website interface across multiple devices. At the top, a dark navigation bar contains the CAT Financial logo and links for Solutions, Current Offers, Resources, Customers, and About Us. A search icon is also present. The main banner features the text "CAT FINANCIAL 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 a blue box with a red arrow pointing to it. Below this menu, there are three columns of content: "Finance Solutions", "Extended Protection", and "The New CatFinancial.com". Each column includes a brief description of the service. To the right, a smartphone displays the mobile version of the website, showing the same navigation and account management options. A red arrow points to the "REGISTER OR LOG IN" button on the smartphone screen.

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 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.



CAT Financial Help CatFinancial.com

Select Language

Select the Region to filter the languages available.

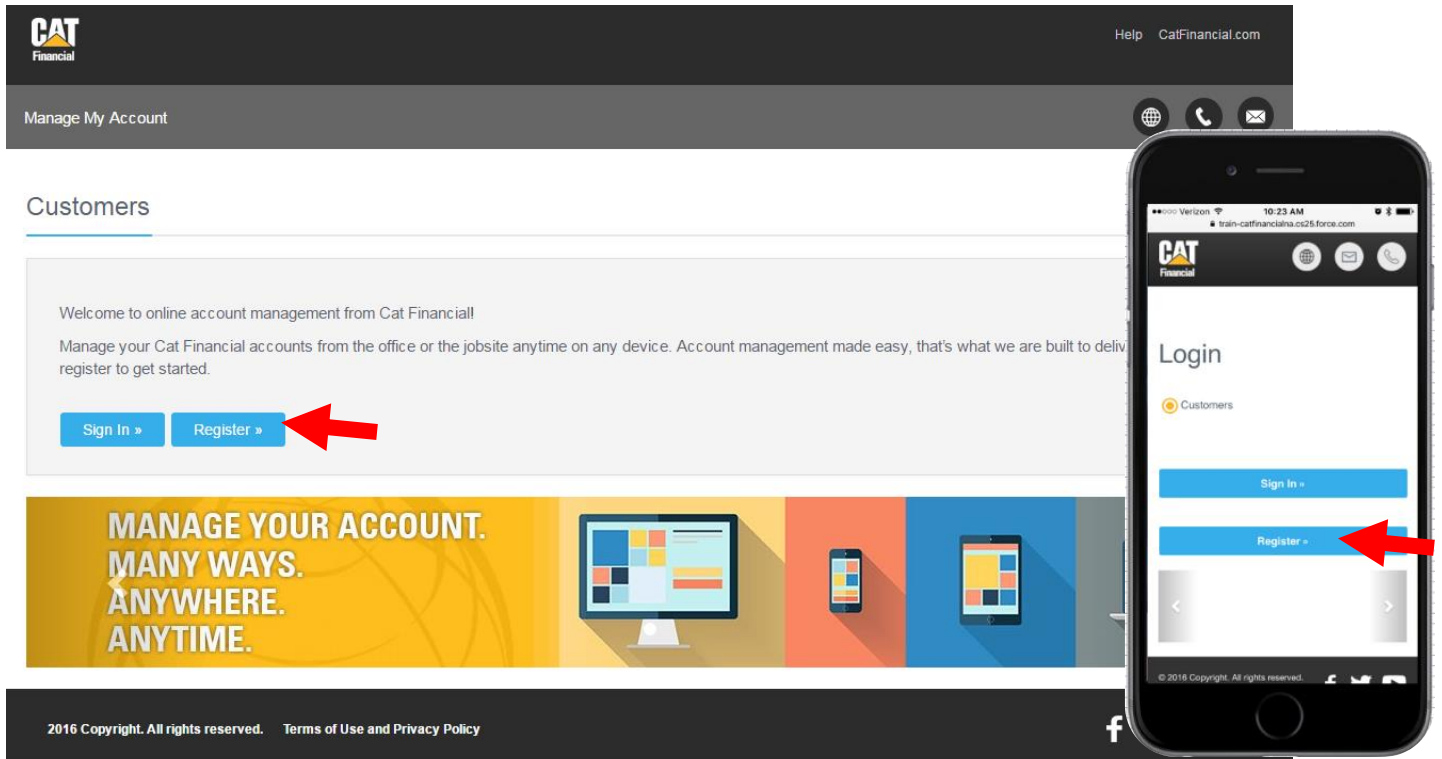
Region/Office
All

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

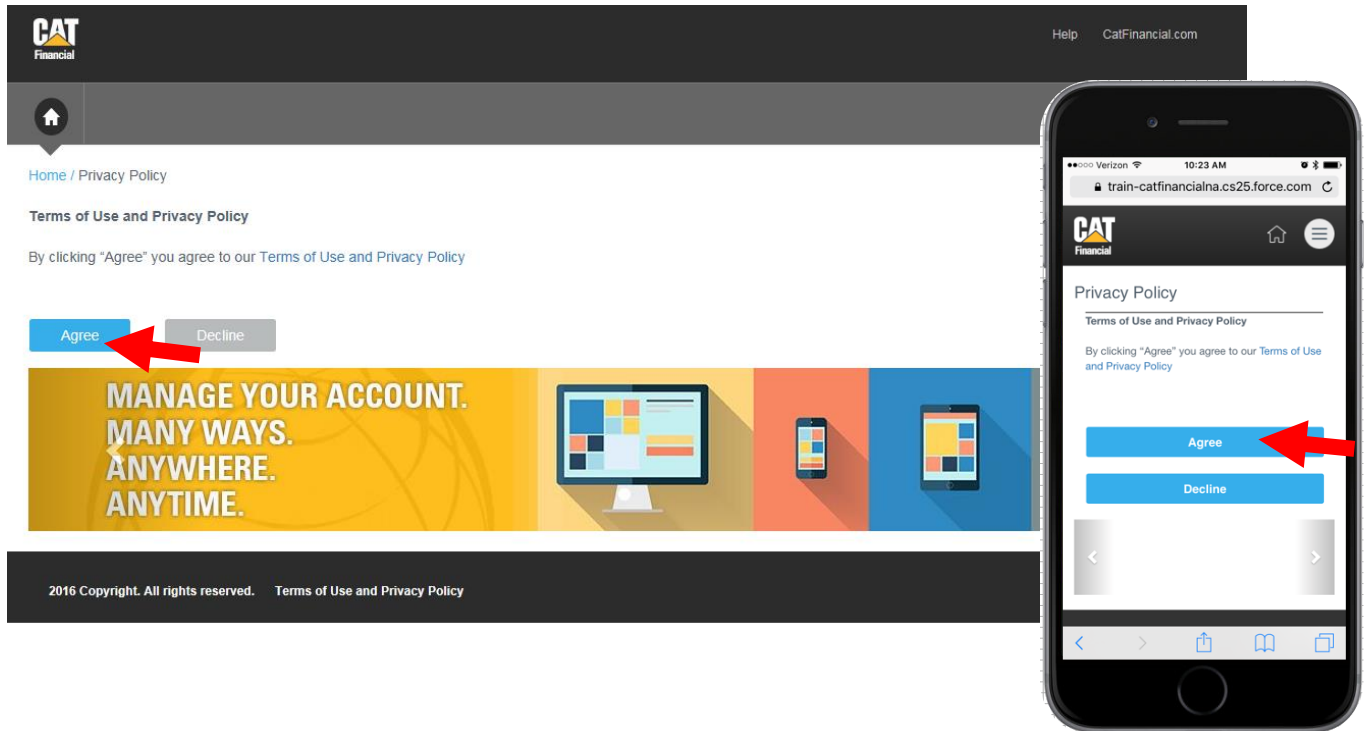
Smartphone screen content:

- Pays CHINA | 中国
Languages Available 简体中文
- Pays JAPAN | 日本
Languages Available 日本語
- Pays MALAYSIA
Languages Available English
- Pays PHILIPPINES
Languages Available English
- Pays SINGAPORE
Languages Available 简体中文 | 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 MyCatFinancial.



Once you have agreed to the Terms of Use and Privacy Policy, you may begin to register for 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.

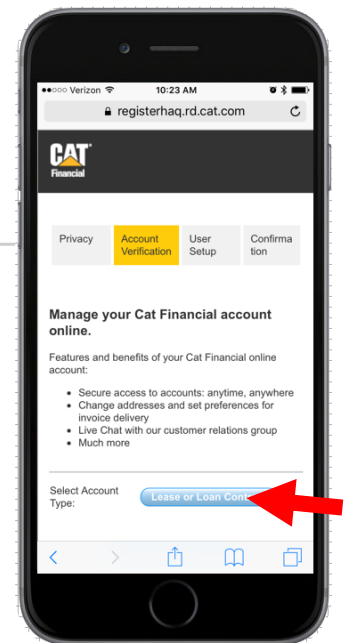
Features and benefits of your Cat Financial online account:

- 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 **+632-683-2006** Monday – Friday 8.30am – 5.00pm.

Privacy

Account Verification

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Manage your Cat Financial account online.

Features and benefits of your Cat Financial online account:

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- 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 : Year :

☐ I am authorized to view information for this account

Validate

[Need help? Please contact us](#)



The image shows a smartphone screen displaying the Cat Financial account registration form. The form is titled 'Manage your Cat Financial account online.' and lists features and benefits. It includes a 'Select Account Type' section with a 'Lease or Loan Contract' button. Below this, there are input fields for 'Enter a Contract Number', 'Enter the serial number or customer ID', and 'Enter Commencement Date'. The date is set to '1 - January' for the month and '2018' for the year. There is a checkbox for 'I am authorized to view information for this account' which is unchecked. At the bottom, there are 'Validate' and 'Cancel' buttons, with a red arrow pointing to the 'Validate' button. A link 'Need help? Please contact us' is also visible.

MANAGE YOUR ACCOUNT

Once you have successfully registered your MyCatFinancial account, you will see your contract(s) 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 features 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

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

<< 1 >>

Equipment

Serial Number: 123456ABC
Model:
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 overlay on the left showing the navigation menu.

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 has a date range filter section with 'Start Date' and 'End Date' fields, 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 section with 'Start Date' and 'End Date' fields, 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

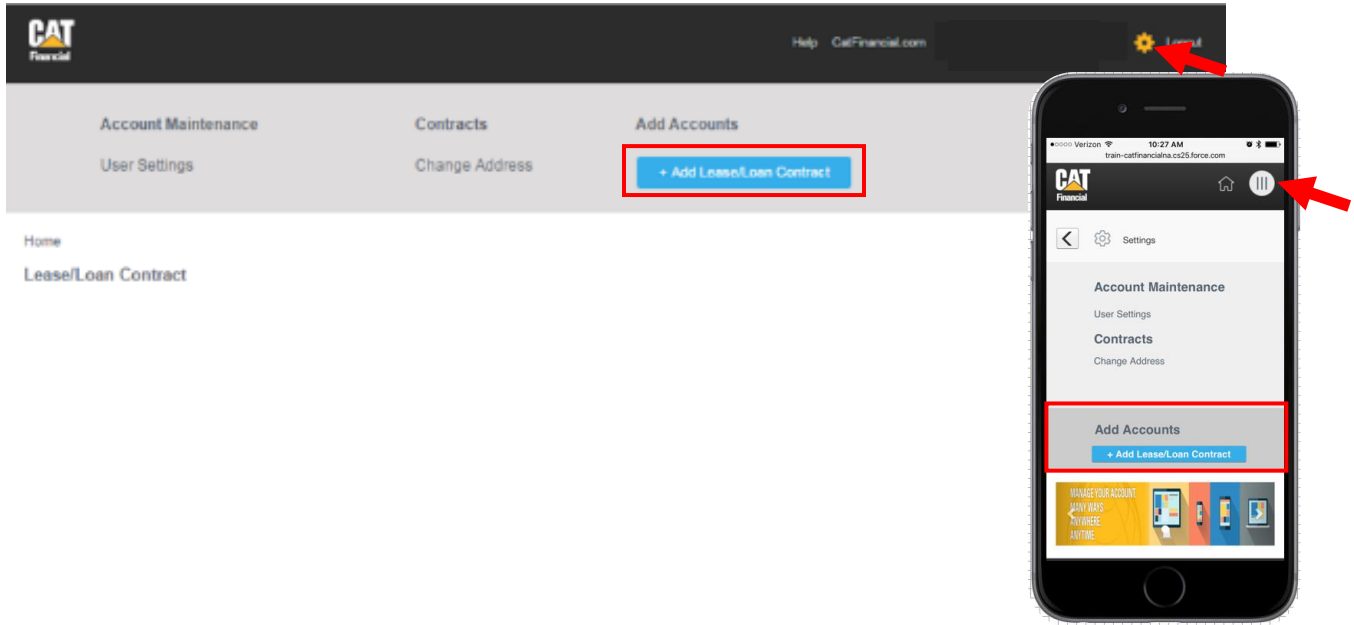
Mobile App Overlay:

The mobile app overlay on the left shows the 'CAT Financial' app interface. The navigation menu is visible, with 'Contract Summary', 'Open Item Details', and 'Payment History' options. 'Open Item Details' is highlighted with a red box.

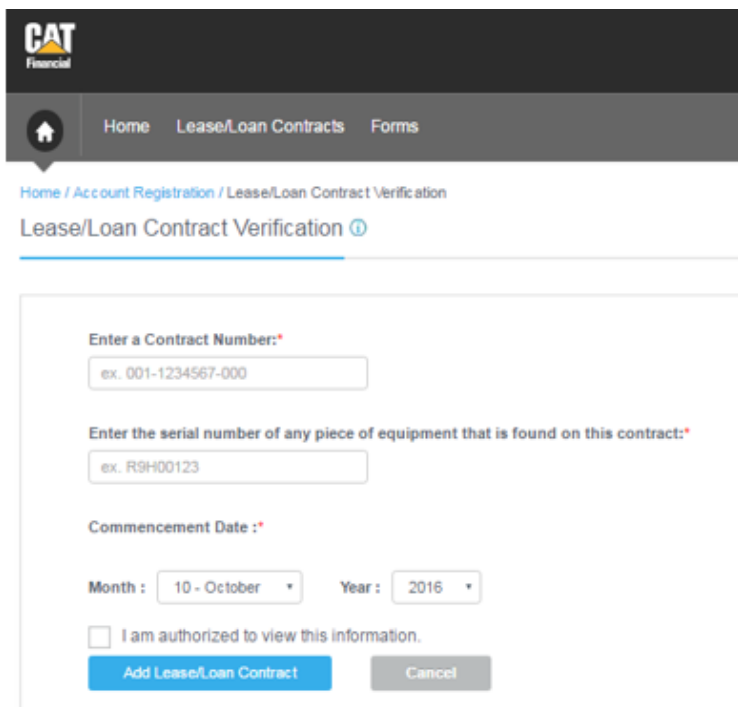
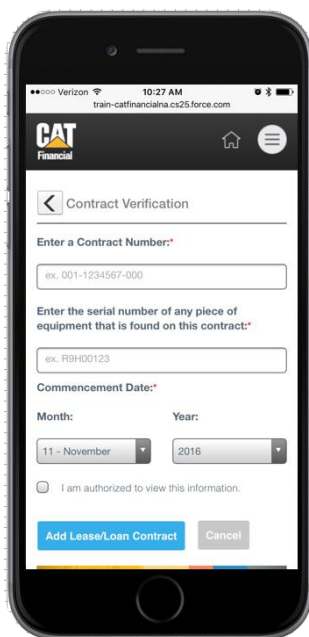
Footer:

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.

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 with 'Active Contracts' and 'Inactive Contracts' tabs, and a list of contracts with details like Contract number and Payment Due Date.

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 browser view, and on the right is a mobile app view.

Desktop Interface:

- Header:** CAT Financial logo, Help, CatFinancial.com, and a Logout button with a gear icon.
- Navigation Bar:** Account Maintenance (with a red box around 'User Settings'), Contracts (with 'Change Address'), and Add Accounts (with '+ Add Lease/Loan Contract').
- Section:** 'Update Personal Information' with a blue underline.
- 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 (dropdown menu)
- Buttons:** Submit (blue) and Reset (grey).

Mobile App Interface:

- Header:** CAT Financial logo, a home icon, and a settings gear icon (highlighted with a red arrow).
- Section:** 'Update Personal Information' with a back arrow.
- Form Fields:**
 - First Name*: First
 - Last Name*: First
 - E-mail Address*: Customer Email
 - Re-enter E-mail Address*: Customer Email
 - Primary Language*: English (dropdown menu)

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 reads '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 enclosed in a red rectangular box on the screen.

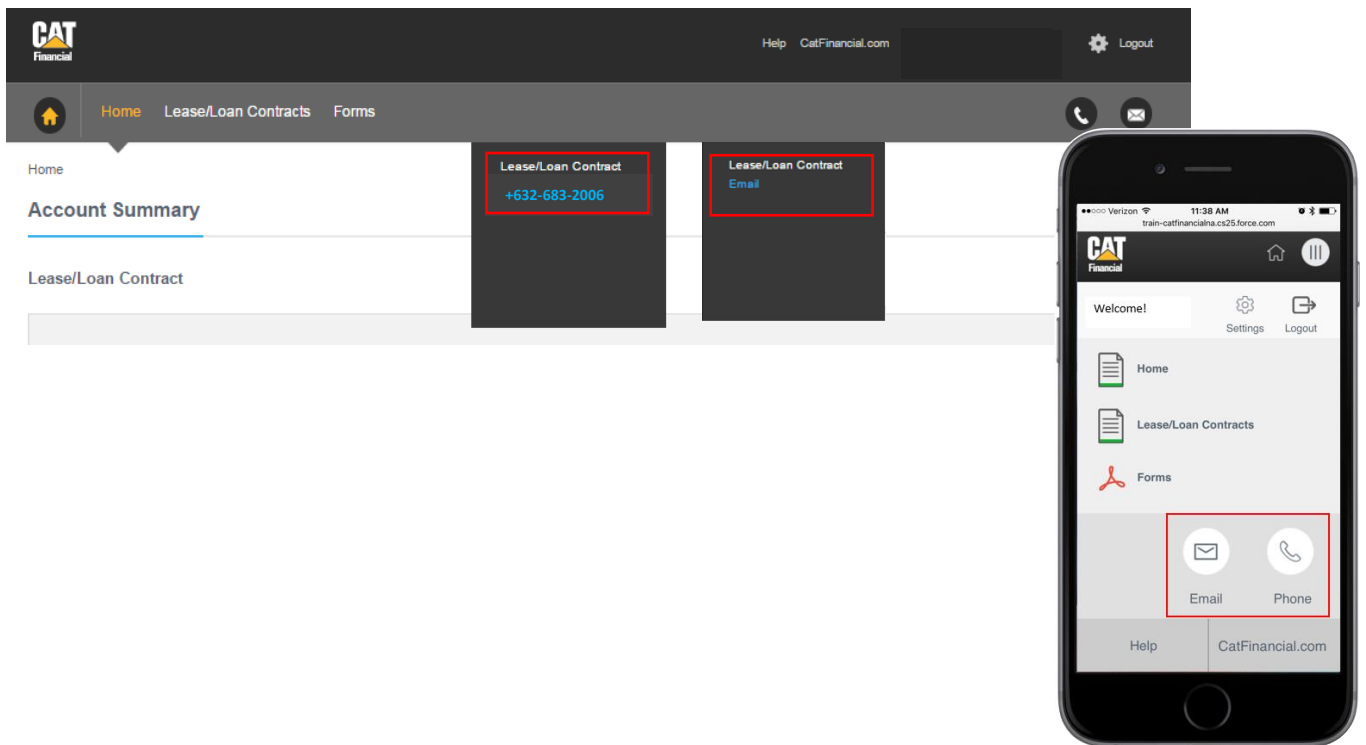
Desktop Form Structure:


- 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 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
 - Submit Cancel

Mobile App Version: The mobile app interface is shown on the right, displaying the same 'Change Address' form within a red rectangular box on the screen.


CONTACT US


If you have questions or experience issues accessing your account information, please contact us by phone at **+632-683-2006** or email us by clicking the email icon in the upper right corner.





HelpCatFinancial.com

Logout



Home

Lease/Loan Contracts

Forms

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





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 **+632-683-2006**.

