

MyCatFinancial Account Management

CUSTOMER GUIDE

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



LOG IN OR REGISTER

IT'S EASY TO MANAGE YOUR ACCOUNT ONLINE.

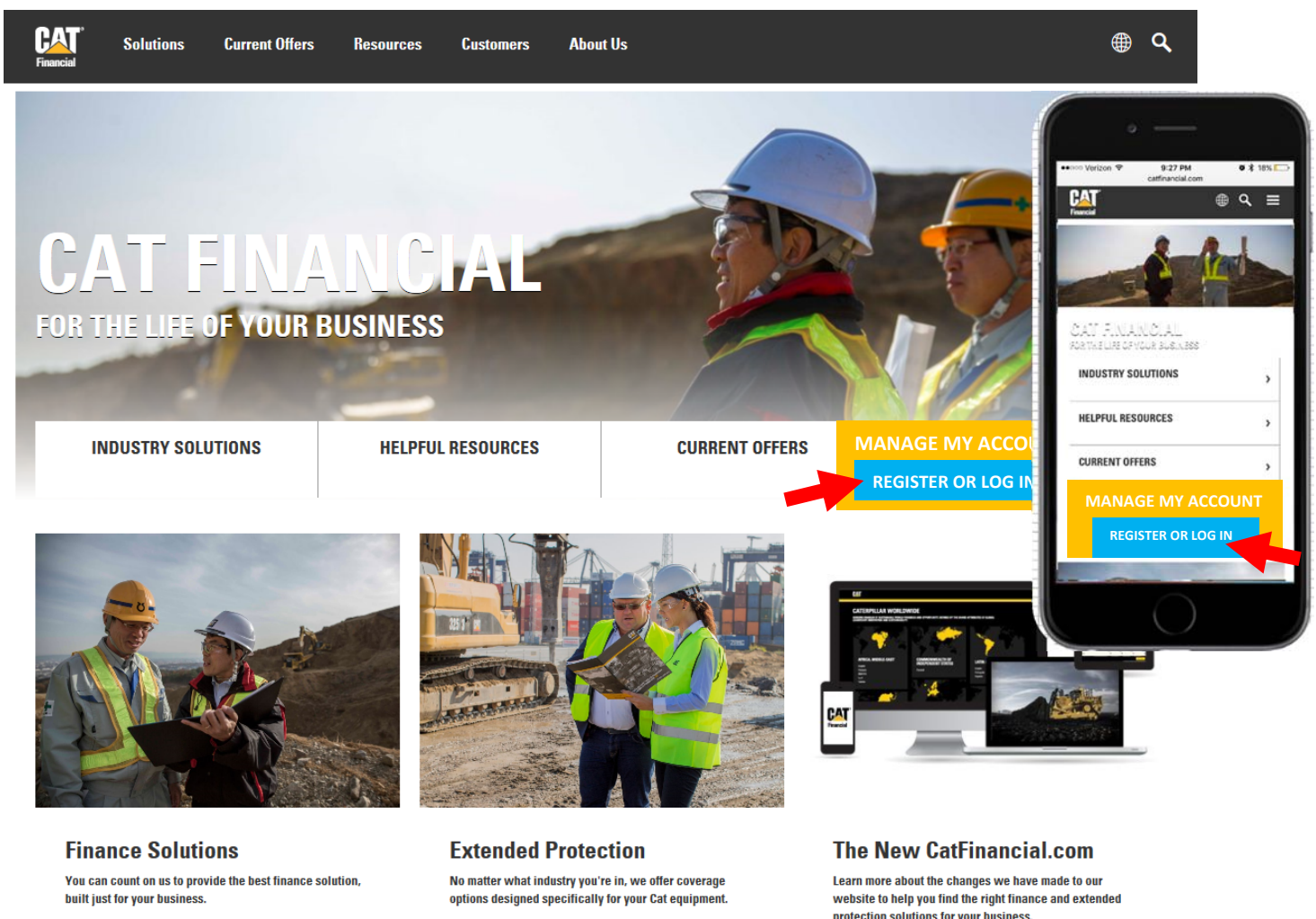
This guide will provide you with an overview of online account management from Cat Financial. It offers helpful step-by-step instructions to register and manage your account anytime, anywhere, and on any device, 24/7.

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
 - > 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 has a red arrow pointing to it. To the right, a smartphone displays the mobile version of the website, showing the same "MANAGE MY ACCOUNT" link with a red arrow pointing to it. Below the main banner, there are three sections: "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 displaying the website. Each section 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 image shows a desktop browser window and a mobile app interface. The desktop page is titled 'Select Language' and features a dropdown menu for 'Region/Office' set to 'All'. Below this is a table with columns for region and language options. A red arrow points to the 'SINGAPORE' row, which lists '简体中文 | English'. To the right, a mobile app interface is shown with a list of regions and their available languages. A red arrow points to the 'SINGAPORE' entry, which shows '简体中文 | English' as available languages.

Select Language

Select the Region to filter the languages available.

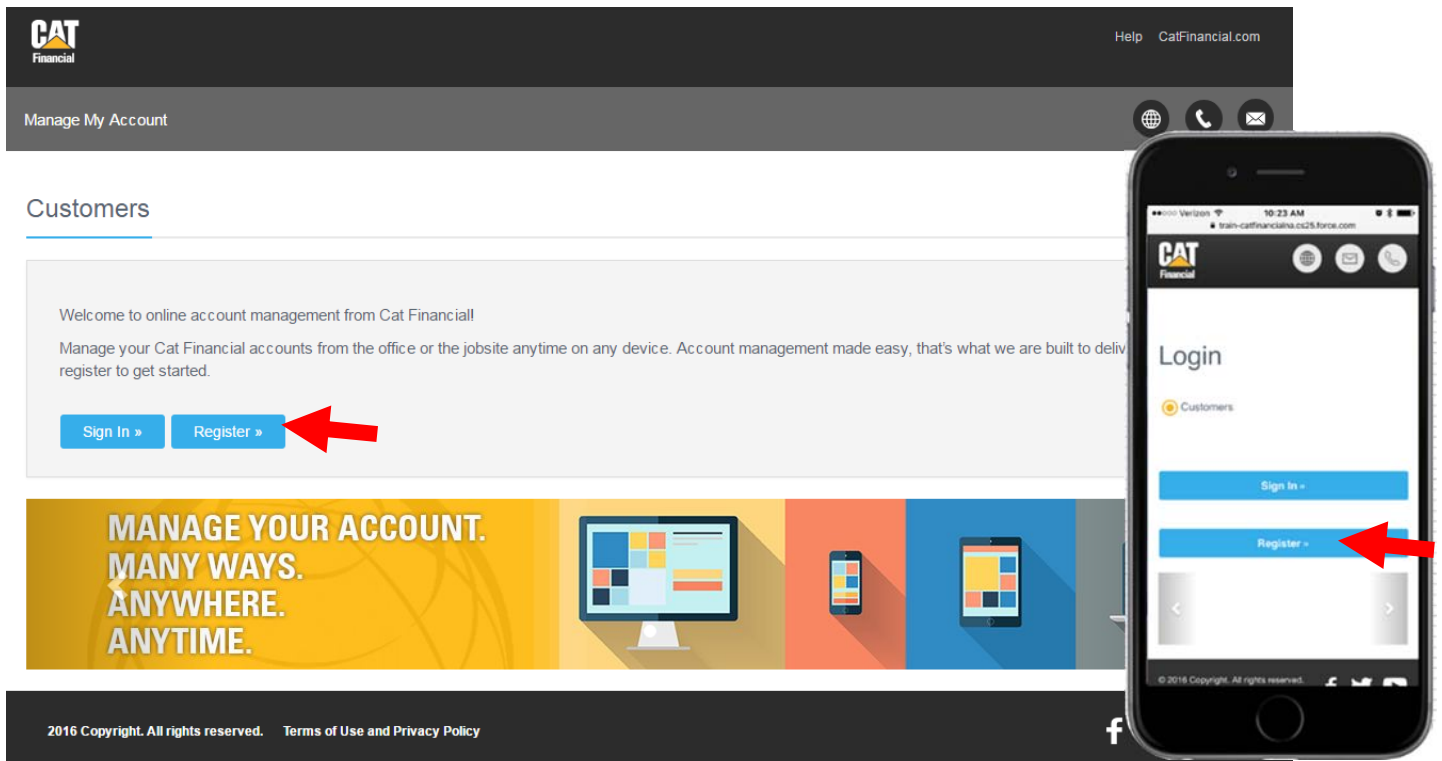
Region/Office
All

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

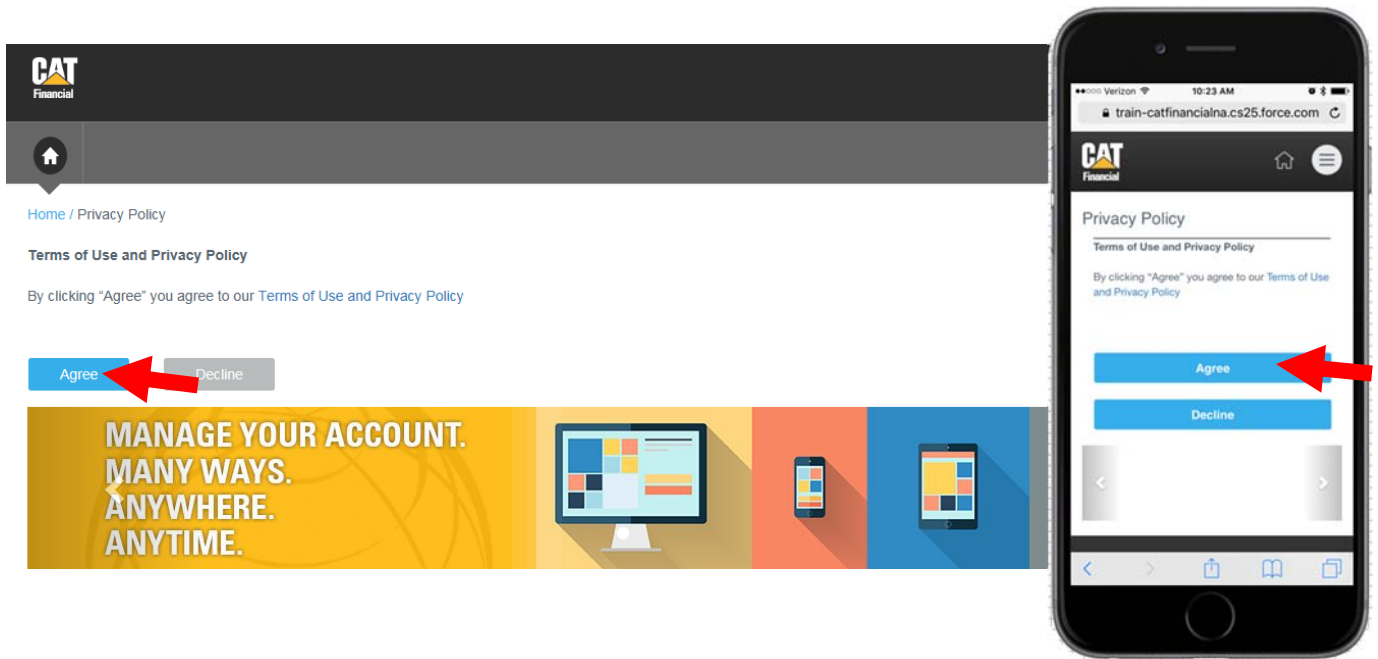
Mobile App Interface:

- 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

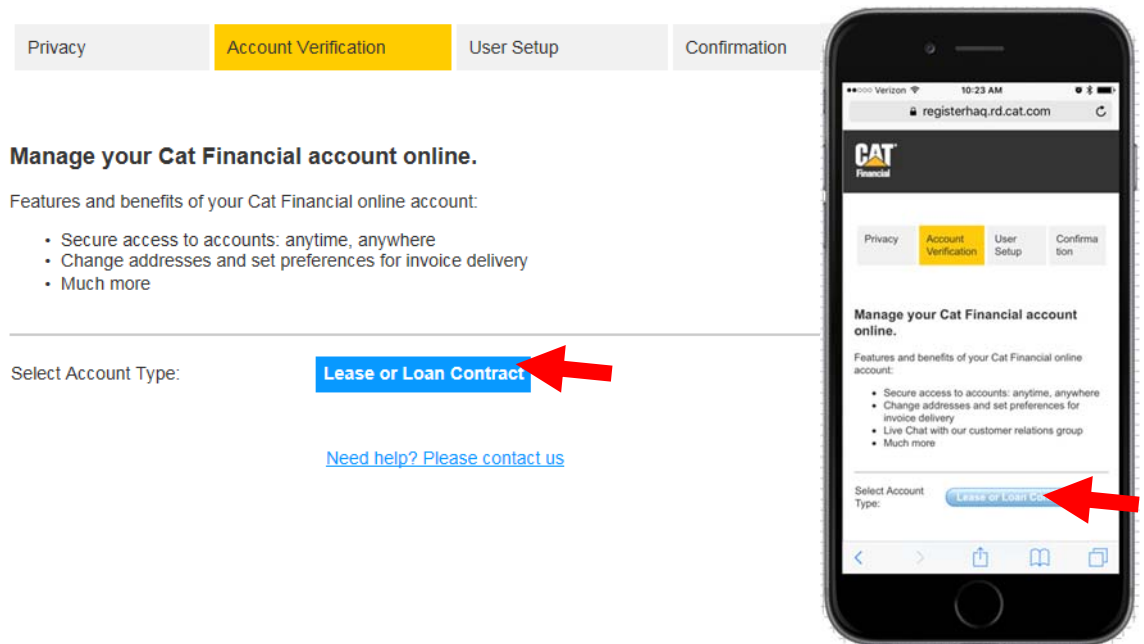
Once you have selected your country and language, you will be redirected to the MyCatFinancial homepage. If you are registering your account for the first time, click **Register** in the blue box.



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 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**.



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 **+65-6828-7580** 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

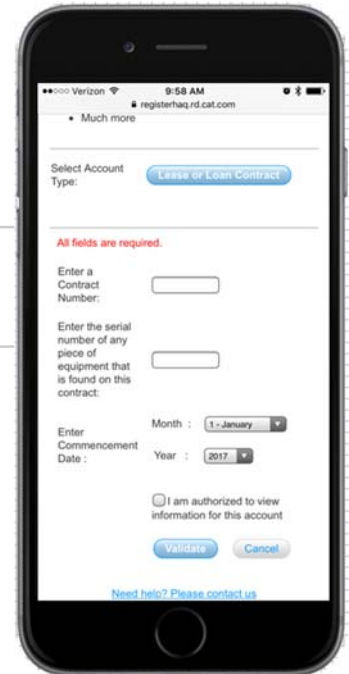
Year : 2018

☐ 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 MyCatFinancial web interface and a mobile app interface. The web interface shows the 'Account Summary' page with a 'Lease/Loan Contract' table. The mobile app shows the 'Lease/Loan Contract' screen. Both interfaces highlight the contract number 123-4567890 with red arrows.

Web Interface Account Summary

Home Lease/Loan Contracts Forms

Home

Account Summary

Lease/Loan Contract

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

Mobile App Lease/Loan Contract

Contract
[123-4567890](#)

Assets
1

Payment Due Date
13/10/16

Contract
[123-4567890](#)

Assets
1

Payment Due Date
05/11/16

Contract
[123-4567890](#)

Assets
1

Payment Due Date

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

Number: Term in Months: 24 Payment Due Date: 13/10/16
Payment Date: Last Payment Date: 11/10/16
Date: 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: TRACK EXCAVATORS
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

The top screenshot shows the "Open Item Details" page. The header includes the CAT Financial logo, navigation links (Home, Lease/Loan Contracts, Forms), and a "Logout" button. The page title is "Open Item Details" with a "View All >" button. The contract information is "Contract - 123-4567890" and "Contract Details - CUSTOMER NAME". A date range filter is present with "Start Date:" and "End Date:" fields. A "Contract Menu" on the right highlights "Open Item Details" (indicated by a red box). Below the menu is a table with columns: Line Tax, Total Due, Line Type, Applied, and Remaining. The table content is "No data available."

Bottom Screenshot: Payment History

The bottom screenshot shows the "Payment History" page. The header is similar to the top screenshot. The page title is "Payment History" with a "View All >" button. The contract information is "Contract - 123-4567890" and "Contract Details - CUSTOMER NAME". A date range filter is present with "Start Date:" and "End Date:" fields. A "Contract Menu" on the right highlights "Payment History" (indicated by a red box). Below the menu is a table with columns: Due Date, Receipt Date, Payment Method, Applied Amount, and Item. The table content is as follows:

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

Below the table is a pagination control showing "1" of 1 pages.

Mobile App Interface (Left):

The mobile app interface shows the CAT Financial logo, navigation links, and a "Contract Summary" dropdown menu. The dropdown menu is open, showing "Open Item Details" and "Payment History" (both highlighted with red boxes). Below the menu is a table with columns: Customer Number, Term in Months, Last Payment Date, Termination Date, Commencement Date, Final Payment Date, and Payment Due Date. The table content is as follows:

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

Below the table is a table with columns: Serial Number, Model, and Description. The table content is as follows:

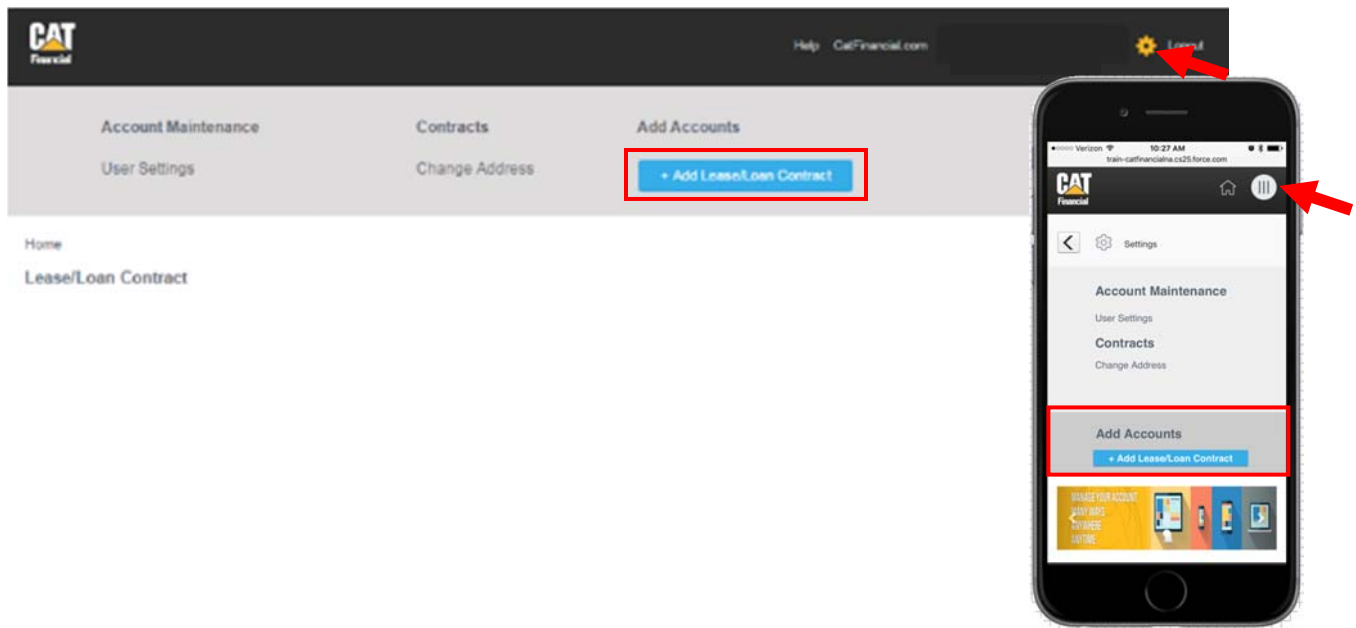
Serial Number	Model	Description
1234ABCD	320EL	320EL HAZ LG/MED TRACK EXCAVATORS

At the bottom of the mobile app interface is a "Print View" button.

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.

The image displays the 'Lease/Loan Contract Verification' form in both mobile app and desktop browser views. The mobile app view on the left shows the form with fields for 'Enter a Contract Number:' (with example '001-1234567-000'), 'Enter the serial number of any piece of equipment that is found on this contract:' (with example 'R9H00123'), and 'Commencement Date:' with dropdowns for 'Month' (set to '11 - November') and 'Year' (set to '2016'). There is a checkbox for 'I am authorized to view this information.' and buttons for 'Add Lease/Loan Contract' and 'Cancel'. The desktop browser view on the right shows the same form. The top navigation bar includes 'Home', 'Lease/Loan Contracts', and 'Forms'. The breadcrumb trail reads 'Home / Account Registration / Lease/Loan Contract Verification'. The form fields are identical to the mobile app view, including the example values and the authorization checkbox.

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

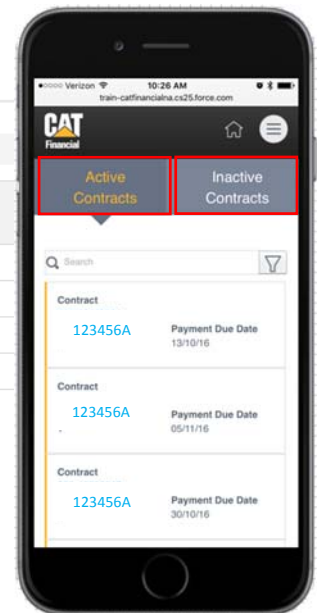
Active Contracts

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 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' and a 'Logout' button are 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 blue '+ Add Lease/Loan Contract' button). Below the navigation bar is the 'Update Personal Information' form. It contains fields for 'First Name*' (with 'Customer' as a placeholder), 'Last Name*' (with 'Name' as a placeholder), 'E-mail Address*' (with 'Customer.email@email.com' as a placeholder), and 'Re-enter E-mail Address*' (with 'Customer.email@email.com' as a placeholder). There is also a 'Primary Language*' dropdown menu set to 'English'. At the bottom of the form are 'Submit' and 'Reset' buttons. On the right is a mobile app interface. It shows the same 'Update Personal Information' form on a smartphone screen. A red arrow points to the settings gear icon in the top right corner of the app's header.

Desktop Interface:

- Header: CAT Financial, Help CatFinancial.com, Logout
- Navigation: Account Maintenance (User Settings), Contracts (Change Address), Add Accounts (+ Add Lease/Loan Contract)
- Form: Update Personal Information
- 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 Interface:

- Header: CAT Financial, Home icon, Settings gear icon (highlighted with a red arrow)
- Form: Update Personal Information
- 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 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:*. Below this is the 'All Contracts' section with the text 'This address change applies to all of my contracts' and two radio buttons, '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 condensed for a smaller screen. A red rectangle highlights the 'Change Address' form area on the phone 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 Form Structure:

- Header:** CAT Financial, Home icon, Menu icon
- 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]

CONTACT US

If you have questions or experience issues accessing your account information, please contact us by phone at **+65-6828-7580** or email us by clicking the email icon in the upper right corner.

The image displays two screenshots of the CAT Financial website and mobile app interface, illustrating contact options.

Top Screenshot (Desktop Website): The website header shows the CAT Financial logo, a navigation bar with "Home", "Lease/Loan Contracts", and "Forms", and a "Help" link. The main content area includes a "Lease/Loan Contract" section with a red box highlighting the phone number **+65-6828-7580** and another red box highlighting the "Email" link.

Bottom Screenshot (Mobile App): The mobile app interface shows the same navigation bar. The "Lease/Loan Contracts" section is highlighted with a red box, and the "Email" and "Phone" icons are also highlighted with a red box.

Bottom Screenshot (Desktop Website): The website shows the "Contact Us: Lease/Loan Contracts" page. The "E-mail Form" section includes fields for "Name" (Customer Name), "E-mail Address" (Customer Email), "Phone Number", "Purpose" (Account Information), and "Message". A "Submit" button is located at the bottom of the form.

Bottom Screenshot (Mobile App): The mobile app shows the "Contact Us: Lease/Loan Contracts" page. The "E-mail Form" section is highlighted with a red box, showing the same fields as the desktop version.

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 **+65-6828-7580**.

