MY.CAT.COM RELEASE NOTES

November 2021

MY.CAT.COM

My.Cat.Com delivers a means to help customers understand, track, manage and optimize owning and operating cost by being proactive, productive and passionate in earning customers trust.

The mission of My.Cat.Com is to be an all-encompassing equipment management tool that supports dealers and empowers customer users with cost, utilization, reliability and age information that helps them run their business more efficiently and effectively.

WHAT'S NEW

New features added in the November release!

- Maintenance – Post-Rationalization on Completed Services
- "Asset Details" (Mobile) – Rearrange the "Buy Parts" and "Assign Inspection" buttons
- Updates to "Global Search" UI for Employee and Dealer Users
- Email Link from "Batch Summary Email"
- Add Dealer Name and DCN to Subscription Tool-Tip
- Use "Access Requests from Customers" email address(es) for "Link Customer Account" Notifications
- Add Additional Field Validation on QR Code page and Add Asset Modal
- Update Warning Message for Blocked Email Domain as a Customer or Dealer Admin

NEW FEATURES

- **Maintenance – Post-Rationalization on Completed Services**
  - If the PMM API returns that an asset is rationalizable, and has not yet been rationalized - then the user can rationalize the service level occurrence.
  - On the "Assets: Maintenance" page, a new option has been added under the "Actions" drop-down for the most recently completed service level occurrence that can be rationalized – but has not yet been rationalized. The new option displays at the top of the list of options. This new option is displayed as "Rationalize".
  - If the service level occurrence can be rationalized, but has not yet been rationalized, then a "circle with a checkmark" icon displays to the right of the "Completed" status tile.
  - This new icon displays to the right of the "memo" icon that displays to show that there are completion notes for the service level occurrence.

- Hovering over the "circle with a checkmark" icon causes a tool-tip to display that reads as follows: "Not yet rationalized. Click here to rationalize."
- Selecting the "Rationalize" option for the "Actions" drop-down, or clicking the link in the icon hover-over takes the user to the full-page "Schedule Adjustment" modal for the service level occurrence.
- From the "Schedule Adjustment" modal, the user can select from the rationalization options available.
- On the "Asset Details: Maintenance" page, the "Rationalize" option has been added to the "Actions" drop-down menu – if the service level occurrence is rationalizable, but it has not yet been rationalized.
- As with the "Assets: Maintenance" page, those service level occurrences that are displayed on the "Asset Details: Maintenance" page – and can still be rationalized – display with a "circle with a checkmark" icon to the right of the "Completed" status tile.
- The "circle with a checkmark" icon displays with a tool-tip upon hover (just like on the "Assets: Maintenance" page), with the same text: "Not yet rationalized. Click here to rationalize."
- As with the "Assets: Maintenance" page, selecting the "Rationalize" option for the "Actions" drop-down, or clicking the link in the icon hover-over on the "Asset Details: Maintenance" page takes the user to the full-page "Schedule Adjustment" modal for the service level occurrence.
- On the fleet level "Overview" page, a user can filter the "Maintenance" portlet to show only the "Completed" services. Within this portlet, if the most recently completed service is rationalizable, and has not yet been rationalized – then the "circle with a checkmark" icon displays to the right of the "Completed" status tile. Clicking the icon from the "Maintenance" portlet takes the user to the "Asset Details: Maintenance" page – where they can access the "Actions" menu to rationalize as desired.
- On the "Asset Details: Overview (Dashboard tab)" page, there is a "Maintenance" portlet. If the asset has a "Completed" service level occurrence within the selected timeframe AND the completed service level can be rationalized, but has not yet been rationalized – THEN a "circle with a checkmark" icon displays to the right of the "Completed" status tile.
- Clicking the icon from this "Maintenance" portlet takes the user to the "Asset Details: Maintenance" page – where they can access the "Actions" menu to rationalize as desired.

ENHANCEMENTS

- **"Asset Details" (Mobile) – Rearrange the "Buy Parts" and "Assign Inspection" buttons**
  - The mobile view of the "Asset Details" screen has been updated to display the "Buy Parts" (primary action/yellow button) as the top-left button.
  - The "Request Service" (primary action/yellow button) displays to the right of the "Buy Parts" button.
  - The "Assign Inspection" button (secondary action/white button) displays beneath the two primary action buttons.
  - The desktop view is not changed from its current display.

- **Updates to "Global Search" UI for Employee and Dealer Users**
  - The search box that displays when a user clicks on the "Global Search" in the black header section of the page has been updated.
  - The top of the box that displays has two radio button options available for Employee or Dealers users:
    1. "Search across all customers"
    2. "Search in <Customer Name>"
  - If the "Search across all customers" option is selected, then the following text displays above a search field.

"Enter a Serial Number to perform a Global Search across all Customer UCIDs."

- Beneath this text, a search field displays, with a "Search" button that displays as inactive until a valid Serial Number is entered in the field.
- Once a valid Serial Number is entered, the "Search" button displays as active.
- Clicking the "Search" button results in a list of all assets across all Customer UCIDs that match the entered Serial Number.
- If the "Search in <Customer Name>" option is selected, then the following text displays above a search drop-down selector.

"Enter 3 or more characters to search within <Customer Name>."

- Beneath this text, a type-ahead field displays, that once 3 or more characters are entered provides a drop-down selector list.
- Selecting an option from the drop-down list results in a list of all assets within the specified Customer UCID that match the entered characters.

- **Email Link from "Batch Summary Email"**
  - If a Dealer Admin user clicks the link in the batch summary emails, and their active MCC session isn't their Dealer login – then clicking the link takes them to a "Sorry, you do not have access to this page." page.
  - The "Sorry, you do not have access to this page." page also includes a yellow "Log in as a different user" button.
  - When the user clicks the "Log in as a different user" button, they are taken to the My.Cat.com landing page - where they can enter a different username and password.

- **Add Dealer Name and DCN to Subscription Tool-Tip**
  - For Subscribed/Connected Assets only: The Dealer name and Dealer Customer Number display in the Subscription tooltip.
  - The "Dealer Name" and "Dealer Customer Number" have been added to the tool-tip that displays when hovering over the "Subscription" tool-tip.
  - Under the "Telematics Device" data, the "Dealer Name" label has been added – with the specific dealer customer name displayed to the right of the label.
  - Beneath the "Dealer Name" label/data, the label "Dealer Customer Number" is displayed – with the specific dealer customer number (DCN) displayed to the right of the label.

- **Use "Access Requests from Customers" email address(es) for "Link Customer Account" Notifications**
  - "Link Customer Account" emails are sent to the email address(es) listed in the "Access Requests from Customers" section of the "Dealership Configuration – General" page.
  - If there are no email address(es) listed in the "Access Requests from Customer" section, then the logic sends the "Link Customer Account" email to the "General Email Address for the Dealership".

OTHER/OPERATIONS

- **Update Warning Message for Blocked Email Domain as a Customer or Dealer Admin**

  - When a blocked/restricted email domain was entered for an "Invite", the prior error message that was not displayed was not very clear. The user was not told why the invitation has failed ("Invitation failed to send.")

- When a user enters an email address with a blocked/restricted domain, the warning message now reads:

  You cannot register with an email address using any of these domains: cat.com, perkins.com, solarturbines.com, progressrail.com, mwm.net, fgwilson.com, kempervalve.com, anchorcoupling.com

- The blocked/restricted domains are:
  - cat.com
  - perkins.com
  - solarturbines.com
  - progressrail.com
  - mwm.net
  - fgwilson.com
  - kempervalve.com
  - anchorcoupling.com
- When an email with a restricted email address is entered, the system does not try to send the "Invite" email. Only once a non-restricted email address is entered does the system attempt to send the "Invite" email.

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