



# MY.CAT.COM RELEASE NOTES ARCHIVE

## MY.CAT.COM

MY.CAT.COM IS THE ONE PLACE TO ACCESS ALL YOUR EQUIPMENT INFORMATION WITH A SINGLE LOGIN.

When you're online, My.Cat.Com makes it easy to track equipment, take action on alerts, order parts, schedule service or find more details about your assets. Use this archive to learn about the evolution of this resource!

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# NEW FEATURES

Includes all features which have not previously been available or included.

## January 2022:

- **New Enterprise page for user “Sign-Up”**
  - My.Cat.Com has a new “Sign-Up” that provides a consistent experience for users across all Cat® applications.
  - In addition to the new “Sign-Up” page, email verification, State/Province and Zip/Postal fields are now required.
- **Add “No Thanks” Button to Cookie Acceptance Banner**
  - Beneath the current text in the Cookie Acceptance banner, the following text has been added: **“By clicking ‘Agree’, you are agreeing to our use of functional, performance and targeting cookies.”**
  - A “No Thanks” button has been added to the left of the “I Agree” option in the Cookie Statement banner that displays on the MCC page when a user first accesses the site.
  - Clicking the “No Thanks” button writes to the same cookie as the “I Agree” option – but with “rejected”, instead of “accepted”.
  - It then suppresses the banner, and blocks the collection of Google Analytics.
- **Add Excel Download for “My Activity: Tasks” & “Asset Details: Tasks” pages**
  - A download icon has been added for downloading an Excel document of the information on the “My Activity: Tasks” and “Asset Details: Tasks” pages.
  - The download icon on the “My Activity: Tasks” page displays to the left of the “Search” field at the top of the page.
  - All of the “Task” information from the “My Activity: Tasks” page displays in separate columns within the Excel sheet. The columns include the following:
    1. Task
    2. Assigned To
    3. Created By
    4. Rating
    5. Due Date
    6. Asset
    7. Notes
  - The “Task” data returned on the users “My Activity: Tasks” page displays in rows beneath each column.
  - The download icon on the “Asset Details: Tasks” page displays to the left of the “Search” field within the section beneath the asset dashboard.
  - All of the “Task” information from the “My Activity: Tasks” page displays in separate columns within the Excel sheet. The columns include the following:
    1. Task
    2. Assigned To
    3. Created By
    4. Rating
    5. Due Date
    6. Notes
  - The “Task” data returned on the users “Asset Details: Tasks” page display in rows beneath each column.



## November 2021:

- **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.

## October 2021:

- **Pass Asset Coordinates into Google Maps for Driving Directions**

- A “Get Directions” button/link has been added to the “Asset Location” modal.
- The “Get Directions” button is displayed in the upper left corner of the modal – and is a yellow/primary action button.
- Clicking the “Get Directions” button opens Google Maps in another tab.

- The asset location is passed to Google Maps from the “Asset Location” modal – and displays in the location field within the Google Maps page.
- Google Maps shows the location (latitude/longitude) that was passed, with a map pin.
- There is a “Directions” icon that is displayed on the Google Maps page – that when clicked shifts the Google Maps page to a state where the final destination field is pre-filled with the asset location.
- The user is able to enter the starting point into the appropriate field, and get driving directions returned.

#### February 2021:

- **Maintenance – Update to V3 API to All “Enable/Disable” of VL Assets & Disable “Track” Toggle for VL Assets**

- MCC has been updated to use V3 for the PM API, so that VisionLink asset tracking can be enabled/disabled – using the “Enabled/Disabled” toggle in the “Maintenance Settings” modal.
- The “Enabled/Disabled” toggle no longer displays as “grayed out” (inactive) for VL, but displays the same as it does for all other assets.
- Since the “Enabled/Disabled” toggle is now functional for VL assets, there is no tool-tip that displays upon hover.
- On the “Edit Maintenance Settings” page, the “Track” toggle displays as inactive for VisionLink assets.
- Hovering over the inactive “Track” toggle causes a tool-tip to display. The text within the tooltip reads: “VisionLink subscribed assets cannot be enabled or disabled in My.Cat.Com.”

#### November 2020:

- **Account Provisioning - My.Cat.com “Welcome” Email Updates**

- The My.Cat.com customer “Welcome” email has been updated to read as follows:

Thank you for registering with My.Cat.com.

Your username is: (username)

Your Cat dealer(s) has received your request to link you to the correct account(s) or have a new account created.

Your Caterpillar account is the single account that you can use to log in to select Cat® applications including:

- [My.Cat.com](#): Manage your equipment. Track maintenance activities, view invoices, schedule operations, and more.
- [Cat App](#): Manage your equipment. A companion app to [My.Cat.com](#), where you can manage your equipment on the go from your iOS or Android mobile devices.
- [Cat.com](#): Explore products. Set site-wide preferences, set a preferred dealer, and streamline materials requests.
- [Parts.Cat.com](#): Buy online. Experience a fast checkout process, saved order history, saved lists, and more.

Sincerely,  
The Caterpillar My.Cat.com team



## October 2020:

- **Account Provisioning – Add Legal Footer Text to All My.Cat.com Emails**

- Legal footer text has been added to the bottom of ALL emails sent out by My.Cat.com. The text reads as follows:

“© 2020 Caterpillar. All Rights Reserved. CAT, CATERPILLAR, LET'S DO THE WORK, their respective logos, "Caterpillar Corporate Yellow", the "Power Edge" and Cat "Modern Hex" trade dress as well as corporate and product identity used herein, are trademarks of Caterpillar and may not be used without permission.”

- The footer section is light gray color, with the text displayed a darker gray text.

- **New Email to Existing Users Added to MCC**

- A new “Welcome” email is sent to existing users that are added as users for a specific UCID in My.Cat.com. This email is sent to the existing users that have never logged in to MCC.
- The text of the email should read:  
**You have been granted access to My.Cat.com by <Dealer Admin/Customer Admin requestor’s name – First Name (Preferred) Last Name>.**  
**Your username is: <username>**
- Beneath the “username” text, there is a yellow button with the text “Sign in to My.Cat.com”. Clicking this button takes the user to My.Cat.com launch page – where they are able to enter their username to access My.Cat.com.
- Beneath the “Sign in to “My.Cat.com” button, the email displays the same text as in the standard “Welcome” email – which provides the email recipient with brief description of the other Cat applications that they can access with their account.
- The text reads as follows:

**Your Caterpillar account is the single account that you can use to log in to select Cat® applications including:**

- **My.Cat.com:** Manage your equipment. Track maintenance activities, view invoices, schedule operations, and more.
- **Cat App:** Manage your equipment. A companion app to [My.Cat.com](#), where you can manage your equipment on the go from your iOS or Android mobile devices.
- **Cat.com:** Explore products. Set site-wide preferences, set a preferred dealer, and streamline materials requests.
- **Parts.Cat.com:** Buy online. Experience a fast checkout process, saved order history, saved lists, and more.

Sincerely,  
The Caterpillar My.Cat.com team

- The very bottom of the email includes the standard MCC email legal footer.

## September 2020:

- **“Invite New User” flow – Send New “My.Cat.Com/Cat App User Invitation Accepted” Email**

- When a user has accepted a MCC “Invite” from an email invitation that they received, the dealer(s) that the user is now associated with is sent a new email. The Dealers Admins are notified that the new user will need to granted additional access to some applications – if desired.



- If the user is associated to multiple dealers, a separate email is sent to each Dealer Admin.
- The email is sent to the email address that is listed on the "Dealership Configuration" screen.

### August 2020:

- Cancel Validation request process – Dealer provided cancellation reason, and email sent to user
  - On the “Administration: Dealership Tasks” page, a user can choose to cancel a “Validate Customer User” dealership task from the “Actions” drop-down (“Set Cancelled”). Selecting this option causes the “Cancel Validation Request” modal to display.
  - Submitting this modal triggers the system to send the “Account Validation Cancelled” email.
  - Hovering over the “CANCELLED” tile opens a tool-tip that displays the “Cancellation Reason” – with the text of the “Reason for Cancellation” entered in the modal. In addition, there is a “Cancelled By” label – followed by the name of the person who cancelled the validation request.
- “Registration Report” cancellation email to users (with Dealer reason included)
  - Administration users can cancel an Account Validation Request that is still pending, by selecting this option on the “Registration Report”. The owner of the account that has had the validation cancelled will receive an email detailing the name of the person who cancelled the request, as well as the reason given for the cancellation.
- Expand/Collapse the left-navigation on the “Asset Details” page
  - The sidebar portion of the Asset Details page can expand and collapse as shown in the images below.
  - When collapsed, the side bar text is removed leaving only a set of symbols.
  - Hovering over a symbol shows the symbol’s full name in a tool-tip.
  - If a sidebar item has multiple selections below it like Health & Maintenance, the user can click on the icon and a sub-menu will pop out to the side as shown in the image above, with the various selections in that sub-menu.

### July 2020:

- Ability to complete maintenance occurrence outside of the current schedule
  - Users are able to mark upcoming “Independent Interval” or “Major Component” interval maintenance tasks as “Complete”.
  - Users are able to “View Job Operations and Buy Parts” for the maintenance tasks listed in the “Services Outside of Schedule” modal.
- Add a “Customer Value Agreement” icon for assets with a CVA
  - A new Customer Value Agreement icon has been added to several places on MCC pages.
  - The Customer Value Agreement icon has been added to assets that display on the following pages (for both desktop and mobile views);
    - 1. Asset Details**
      - The “Ownership” section has been renamed to “COVERAGE”.
      - Beneath the “COVERAGE” label, the “ownership” and “CVA” icons are stacked. The “ownership” icon is stacked on top, with the icon and text as it is today under the “Ownership” label.
      - The “CVA” icon is under the “ownership” icon, with the text “CVA” to the right of the new yellow icon.
    - 2. Assets: List (Grid view)**
      - The new yellow “CVA” icon has been added to the row of icons displayed to the right of the Asset ID data.
      - The “CVA” icon is in-line with the “ownership” icon, and the “connection” icon.
      - The “Connection” icon is displayed first, then the “CVA” icon, and then the “Ownership” icon.
    - 3. Assets: List (Map view) – both on the map, and on the right side in the list**



- The new yellow “CVA” icon has been added to the row of icons displayed to the right of the Asset ID data within the pop-up modal for the map pin. The “CVA” icon is in-line with the “ownership” icon, and the “connection” icon.
- The new yellow “CVA” icon has been added to the row of icons displayed to the right of the Asset ID data shown in the list of assets to the right of the map. The “CVA” icon is in-line with the “ownership” icon, and the “connection” icon.
- The “Connection” icon should be displayed first, then the “CVA” icon, and then the “Ownership” icon.

#### June 2020:

- “Invite” flow – display message to user if email address has an open invitation
  - When sending a My.Cat.Com invitation to a potential new user, the user must enter an email address. If the email address that is entered already has an open invitation, then an error message will display letting the user know that an invitation already exists – and the system will not allow them to submit another invitation to the same address.

#### May 2020:

- New “Invite New User” flow
  - “Invite New User” to My.Cat.Com: From the “Administration > Manage Customer Users” screen, new customer users can be invited to create an online account for My.Cat.com and Cat App. This replaces the current “Add New User” button and provides a simple, updated flow to give customers validated access. Note: Dealer Admins and Customer Admins are the only ones who have access to this feature. Clicking the “Invite New Users” button opens an “Invite New User” modal – where the email address(es) for the invitation(s) can be entered, as well as the user role for those being invited, the capabilities they will have, and the DCNs they will be able to access.
  - “Invitations” tab on “Manage Customer Users”: An “Invitations” tab displays on the “Manage Customer Users” page, where all of the invitations that have been sent are listed. The invitations remain on this tab until the customer takes action, or for 90 days. Once the customer takes action by creating an account their information will be visible on the “Customer Users” tab. Each invitation can be edited, cancelled, or resent from the “Actions” drop-down.
  - Emails sent from “Invite New User” flow: If an invitation is sent to an email address that has no CWS ID tied to it, then the email that is sent is to “Register for My.Cat.Com”. The email contains a link to the “Create your Cat account” page – where the email address is pre-populated with the email address to which the invitation email was sent. Once on the “Create your Cat account” page, the user will be able to complete the process of registering for My.Cat.Com by setting their username and setting a password. If the email address entered for inviting a new My.Cat.Com user is one that is already tied to an existing CWS ID, then the email that is sent will include the existing usernames for the entered email, and provide a link for the user to “Sign in to My.Cat.Com” – rather than creating a completely new account. If the user has any problems remembering the password associated to the usernames included in the invitation email, they can get help from the “Forgot Password” link on the My.Cat.Com launch page.
  - Invite New User – “Administrator Initiated Accounts” Report: Admin Users can access a new “Administrator Initiated Accounts” report as an option under “Administration”, to help track the new customers added from the user invitations that are being generated. From this report, the Admin User can see when the new customer account was created, and who created the customer’s account.
- Updates to My.Cat.Com password requirements
  - The requirements for creating a password for My.Cat.Com have been updated for customers to only require 3 of the 4 items (lower case letter, upper case letter, number, or special character), instead of all four. The password requirements for dealer and employee users are not changing, they will still require at least 12 characters, and all 4 of the items.
- Two new “Dealership Tasks” reports added

- There are two new “Dealership Tasks” reports that combine similar dealer task types into a single report to make it easier for a user to gain the information that they need. “All Service Requests” - Combines “Schedule General Service Request”, “Schedule Fault Code Service”, “Schedule GPS Rollover Service”, “Schedule Maintenance Service”, “Schedule Inspection Service” and “Schedule SOS Service”. “All Subscription Requests” - Combines “Upgrade Telematics Subscription” and “Create Telematics Subscription”

## ENHANCEMENTS

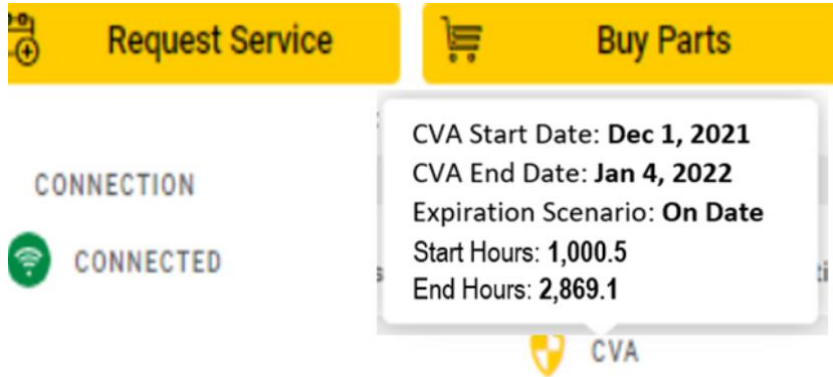
### Upgrade & improvements to existing product features.

#### March 2022:

- **Customer CVA data source with CAT Foresight**
  - My.Cat.com is now displaying customer CVA's that are administered within the CAT Foresight application by CAT dealers.
  - Approved CVA's that maintain a valid Dealer Customer Number (DCN) from CAT Foresight will be displayed to appropriate customer users.
- **CVA “Expiration Scenario” column added to “Assets: Agreements” and “Asset Details – Agreements”**
  - The “Contract #” column is displayed on the “CVA” tab – when it's Empty/Blank a hyphen (-) is displayed.
  - An "Expiration Scenario" column has been added to both the “Assets: Assignments” and “Asset Details – Agreements tab” pages
  - The new “Expiration Scenario” column is displayed between the “Dealer” and “Start Date” columns.
- **Add CVA Expiration Scenario Name and Service Meter Values to CVA Tool-tip**
  - The tool-tip that displays when hovering over the “CVA” icon has been updated - when it displays in the “Asset Details” dashboard section.
  - Three new rows of information have been added below the “CVA Start Date” and “CVA End Date” items:
    - Expiration Scenario: <Expiration Scenario name>
    - Start Hours: <SMU hours at start of CVA>
    - End Hours: <SMU hours at end of CVA>

The labels are not displayed in bold, but the data for each are displayed in bold text. When a user hovers over the “CVA icon” – the tool-tip displays as shown below:

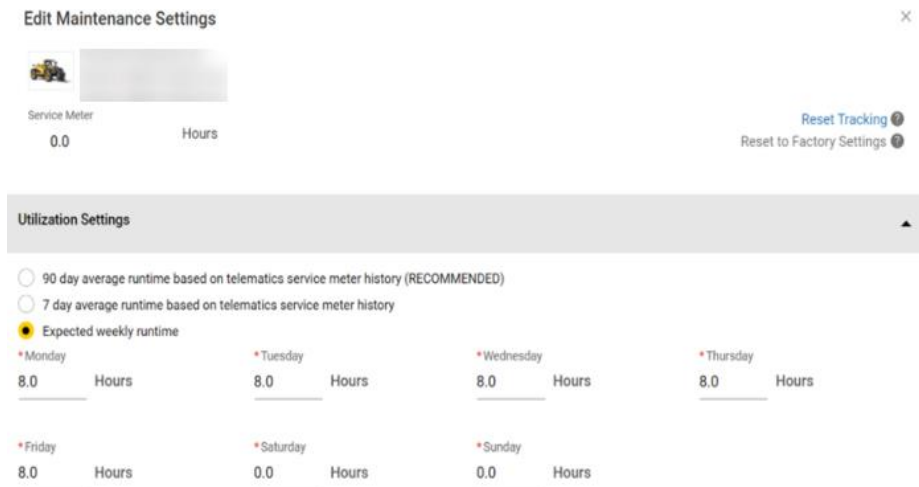




- The Newest CVA found is displayed, if there are multiple.
- There are no tool-tips for "Ownership" or "CVA" displaying in the upper left-corner of the page.

**Maintenance – Display “Hours” input fields for “Expected Runtime” when “serviceMeter” value is zero**

- The MCC UI has been updated to always show the “Hours” SMU component (input fields) in the “Expected weekly runtime” section – even if we get nothing back (0.0) from the PMM Service.
- When the PMM Service returns zero for “serviceMeter”, the default values in the input fields display.



- The other SMU component input fields only display in the “Expected weekly runtime” section if we get a non-zero value for that SMU component.
- The "Service Meter" value in the top portion of the modal (under the asset ID information) is displayed in all cases also - even though the value returned (and displayed) is zero.

**February 2022:**

- **"Device Type" added as a new global "Filter" for Fleet pages**



- A "Device Type" option has been added to the global "Filters".
  - Within the "Edit Filters" modal, a "Device Type" drop-down field has been added.
  - The new "Device Type" drop-down field is placed after "Make", and before "Subscription".
  - The items in the drop-down includes "All" (default selected), and "No Device" – so that users can filter to get only those assets which have no telematics device.
  - The remaining items in the drop-down list include each of the different telematics device types that are present on any of the assets in the fleet list.
  - If a "Filter" is selected from the "Device Type" drop-down, then the "Filters" button on the screen displays a "1" in a yellow circle – to represent a filter has been applied. If additional filters are applied, then the number displayed increases to show the total number of filter types that are being applied to the fleet list.
  - In addition to the display for filter types, there are filter "chips" displayed next to the page title. Each of the specific filter options selected are displayed, so if multiple "Device Types" are chosen, each is shown with a separate "chip".
  - The filter "chips" each have an "X" within it, so that user can remove that specific filter.
  - Any filters that are applied to a fleet level page carry over to all of the other fleet level pages.
- **Mandatory Fields on Customer Registration (State/Province, Postal/Zip Code)**
    - These new mandatory fields are mapped into the "Validate Customer User" email that is sent to the selected Dealer accounts.
    - The mandatory "State/Province" and "Postal/Zip Code" fields have been added to the information displayed in the "Validate Customer User" email under "CONTACT INFORMATION".
    - "State/Province" has been added under the "Country" field.
    - "Postal/Zip Code" has been added under the "State/Province" field.
  - **"Validate User" – "Role" Pre-Selection removed & Default to "Admin" if Company has no Administrator**
    - Within the "Validate User" modal, the "Role" drop-down displays without an option pre-selected.
    - The "Role" drop-down field displays with the text "Please Select" – and replaces that text with the selected user role once it is chosen.
    - The user is not be able to move forward in the "Validate User" workflow until they have made a selection in the "Role" drop-down field.
    - If the associated UCID to which this user is being validated does not already have an Administrator defined for that Dealer & UCID combination, the "Role" is pre-selected as "Administrator" & displays a blue informational text box that reads:

**"Note: This company does not have an Administrator yet. We have automatically suggested this role type, but this can be changed."**
    - The blue text box should display above the "Role" selection field.
    - If the user decides to change the "Role" selection to "User" - rather than the defaulted "Administrator" - then the blue text box message should not display. The blue text box message should only display if the "Role" is selected as "Administrator".
  - **CAT® Browser Icon implemented**
    - The CAT® browser icon appears on all browser tabs – in both standard, and dark mode.





## January 2022:

- **Update “Utilization Settings” for “90 day” and “7 day” options**

- The text descriptions for the “Utilization Settings” options in the “Edit Maintenance Settings” modal have been updated to read as shown below:

90 day average runtime based on telematics service meter history (RECOMMENDED)

7 day average runtime based on telematics service meter history

- Manual maintenance subscribed assets in MCC have the same 3 options as the other Subscribed assets, but the Expected Weekly Runtime option is the Default & "Recommended" option:

90 day average runtime based on telematics service meter history

7 day average runtime based on telematics meter history

Expected weekly runtime (RECOMMENDED)

- “Expected weekly runtime” is the default selection for Manual Maintenance subscribed assets – and is labeled as the “RECOMMENDED” option.
- If the “Expected weekly runtime option is selected, then the user is presented with a grid within which to enter the expected hours for each day.
- 

- **Update “ACTION REQUIRED” Text in the “REMOVE ASSET” and “VALIDATE ASSET” Emails & Add Link to Cat Digital Support page**

- The “ACTION REQUIRED” text in the “REMOVE ASSET” email has been updated to the read:

**Please update your dealerships system accordingly from the details below. For additional details, please review [My.Cat.Com Training: Removing an Asset](#).**

- The “My.Cat.Com Training: Removing an Asset” text is a link that takes the user to a dealer.cat.com page.

- The “ACTION REQUIRED” text in the “VALIDATE ASSETS” email has been updated to the read:

**Please update your dealerships system accordingly from the details below. For additional details, please review [My.Cat.Com FAQs: Adding an Asset](#).**

- The “My.Cat.Com FAQs: Adding an Asset” text is a link that takes the user to a dealer.cat.com page.

- **Dealer Users Do Not See Custom Links at Bottom of Page**

- Dealer users are able to see their custom links in the MCC page footer section, just like Customer users see them.

- **Update text in “Welcome” email related to account linking**

- The text in the customer “Welcome” email has been updated to read:

Thank you for registering with My.Cat.Com

Your username is <username>.

If you haven't done so already, please select your Cat® dealer(s) so that they are notified of your request to link you to the correct account(s) or have a new account created.

- **Maintenance – Multi-Language Support**

- Now you can view Cat default (not customized) services, steps, and parts lists in one of 10 supported languages. Previously, Cat default services, steps, and parts lists were available only in English.
- If your preferred language is one of the 10 supported languages, My.Cat.com Planned Maintenance tracking translates the default services, steps, and parts into your preferred language.
  - English
  - Chinese (Simplified) / 简体中文
  - French / Français
  - German / Deutsch
  - Italian / Italiano
  - Indonesian / Bahasa Indonesia
  - Japanese / 日本語
  - Portuguese / Português
  - Russian / Русский
  - Spanish / Español

#### November 2021:

- **“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".

## October 2021

- **Users are able to retrieve/view up to 10 years of “Service History” data**
  - Users can pull in and expose more than 2 years of Dealer provided “Service History” Data so that they can better manage and plan their equipment maintenance.
  - Users can now view up to 10 years of “Service History” data.
- **“Administration: Manage Customers” – Add UCID # to display**
  - The service that populates the information on the "Administration: Manage Customers" page has been updated to include the UCID #.
  - On the “Administration: Manage Customers” page, Employee users and Dealer Admin users see the customer’s UCID # displayed under the UCID Name.
  - The "View Fleet" link should display on the second line, to the right of the UCID #.
- **“Assets: Agreements” – Add Text and Link to “Account and Settings: Notifications”**
  - On the “Assets: Agreements – Safety Service Letters” page, the following text has been added: “Enroll in Safety Service Letter email notifications [here](#).”

- Clicking the “here” text takes the user to the “Account and Settings: Notifications” page.

- **“Safety Service Letters” Modal & Display of Safety Service Letter number**

- If a user clicks on the “Safety Service Letter” row it opens the “Safety Service Letter” modal over the page.

**“Safety Service Letter” Modal**

- The modal is titled: “Safety Service Letter”.
- The text in the body of the modal is the text that is in the “Safety Service Letter”. This will be the same as the text in the email sent to the user.
- The bottom of the modal includes a yellow/primary action button to “Close” the modal.
- A new service has been created to return the Safety Service Letter text to be displayed in the modal.
- Removed Safety Service Letter # visibility to customer end-users.

- **Updates to the display of “Assets: Health” ratings**

- The component rating severity to overall asset “Rating” mapping for the “Asset Details” dashboard and fleet level list has been updated to match the table below:

Overall Rating	Action Required	Monitor	FYI	Normal
<i>colors</i>	<i>Red</i>	<i>Yellow</i>	<i>Blue</i>	<i>Green</i>
Fault Codes:	High	Medium	Low	
Inspections	Red	Yellow		Green
SOS:	Action Required	Monitor		Normal

- The “Health” portlet on the “Overview” page now displays with three sub-sections (“Fault Codes”, “SOS”, and “Inspection Results”) – each section divided by a light grey line.





- The title of each section – “Fault Codes”, “SOS”, and “Inspection Results” – is linked text, that when clicked takes the user to the “Assets: Health” page, with the specified sub-section tab displayed.
  - Clicking the “Fault Codes” text takes the user to the “Assets: Health” page with the “Fault Codes” tab selected.
  - Clicking the “SOS” text takes the user to the “Assets: Health” page with the “SOS” tab selected.
  - Clicking the “Inspection Results” text takes the user to the “Assets: Health” page with the “Inspections” tab selected.
  
- Underneath each sub-section title, there are further categories/statuses displayed – with the number of assets in each status displayed in front of the status tile.

### **Fault Codes**

The “Fault Codes” section displays counts and tiles for the following statuses:

1. **“High” (red)**  
Clicking on the “High” tile takes the user to the “Assets: Health” page, with the “Fault Codes” tab selected – and filter applied to the page to only show those assets that are in the “High” status.
  
2. **“Medium” (yellow)**  
Clicking on the “Medium” tile takes the user to the “Assets: Health” page, with the “Fault Codes” tab selected – and filter applied to the page to only show those assets that are in the “Medium” status.
  
3. **“Low” (blue)**  
Clicking on the “Low” tile takes the user to the “Assets: Health” page, with the “Fault Codes” tab selected – and filter applied to the page to only show those assets that are in the “Low” status.

### **SOS**

The “SOS” section displays counts and tiles for the following statuses:

1. **“Action Required” (red)**  
Clicking on the “Action Required” tile takes the user to the “Assets: Health” page, with the “SOS” tab selected – and filter applied to the page to only show those assets that are in the “Action Required” status.
  
2. **“Monitor” (yellow)**  
Clicking on the “Monitor” tile takes the user to the “Assets: Health” page, with the “SOS” tab selected – and filter applied to the page to only show those assets that are in the “Monitor” status.
  
3. **“Normal” (green)**  
Clicking on the “Normal” tile takes the user to the “Assets: Health” page, with the “SOS” tab selected – and filter applied to the page to only show those assets that are in the “Normal” status.

### **Inspection Results**



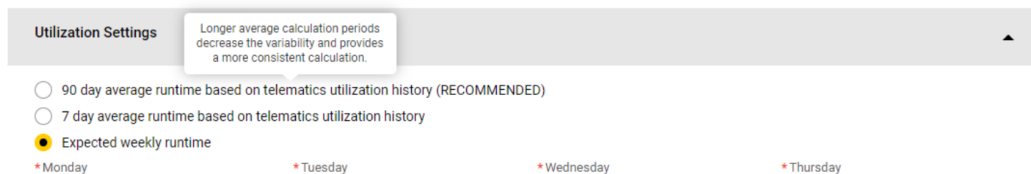
The “Inspection Results” section displays counts and tiles for the following statuses:

1. **“Red” (red)**  
Clicking on the “Red” tile takes the user to the “Assets: Health” page, with the “Inspections” tab selected – and filter applied to the page to only show those assets that are in the “Red” status.
2. **“Yellow” (yellow)**  
Clicking on the “Yellow” tile takes the user to the “Assets: Health” page, with the “Inspections” tab selected – and filter applied to the page to only show those assets that are in the “Yellow” status.
3. **“Green” (green)**  
Clicking on the “Green” tile takes the user to the “Assets: Health” page, with the “Inspections” tab selected – and filter applied to the page to only show those assets that are in the “Green” status.

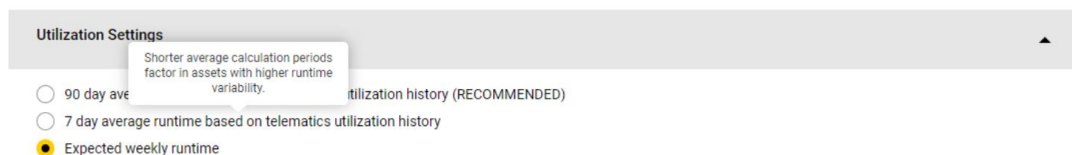
At the bottom of the “Health” portlet, there is a “See all” link in the lower left corner. Clicking on the “See all” link takes the user to the “Assets: Health” page – with no filters applied

## August 2021

- **Tool-tips added for Maintenance “Utilization” options**
  - Within the “Edit Maintenance Settings” modal, in the “Utilization Options” section – hover-over tool-tips have been added to the “90 day” and “7 day” options. When the user hovers their cursor over the “90 day option” text, or the “7 day option” text - the following tool-tips (with text) display.
  - **90 day option:** “Longer average calculation periods decrease the variability and provides a more consistent calculation.”



- **7 day option:** “Shorter average calculation periods factor in assets with higher runtime variability.”

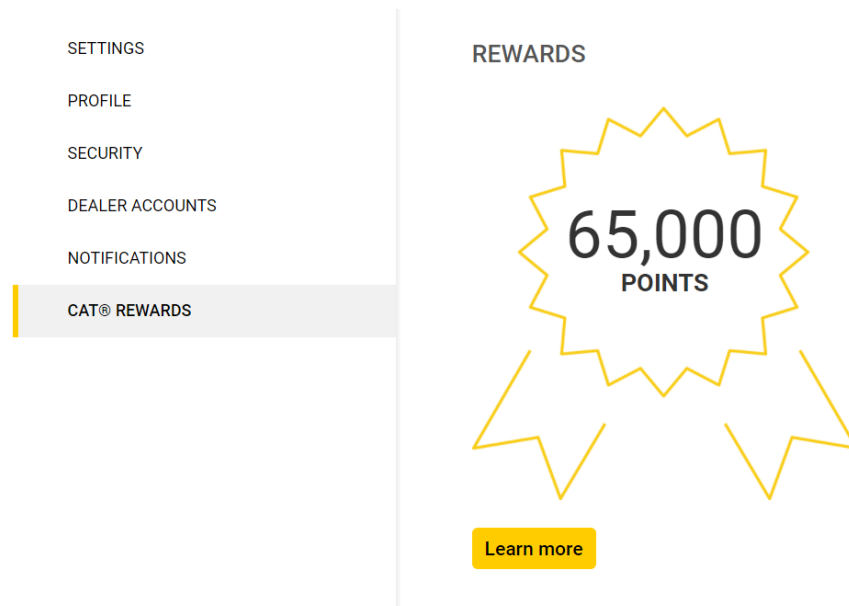


- **New “CAT Rewards” API adopted**

- Source of “CAT Rewards” data has been updated, and users can only see their points balance.
- Customer users can see their “CAT Rewards” balances under “Account & Settings” – on the “CAT Rewards” tab.

[← Back To Assets: Toolkit](#)

## ACCOUNT & SETTINGS



- **Add Cancelled Date in Registration Report UI Tool-Tip**
  - On the “Registration Report” (“User Report” tab), when there is a cancelled validation request listed (cancelled validation request will be denoted with a grey “X” icon) – hovering over the icon opens a tool-tip.
  - The tool-tip should display the following information about the validation request cancellation:
    - Cancellation Reason
    - Cancelled By
    - Cancelled Date

### July 2021

- **Maintenance - Utilization Settings - New 7 day “Average Runtime” option**
  - The existing “Average runtime based on telematics utilization history (RECOMMENDED)” option has been renamed, and the following has been established as the default option: **“90 day average runtime based on telematics utilization history (RECOMMENDED)”**

- A new option has been added (under the “90 days average runtime based on telematics utilization history (RECOMMENDED)” option) – that displays as follows: “**7 day average runtime based on telematics utilization history**”
  - The average historical Runtime data points/text we're currently showing within the grey box has been removed.
- **Add “Odometer” tabs to Fleet and Asset Utilization pages**

### Asset Details Utilization Page

A third tab has been added to the “Asset Details – Utilization” page, to be displayed to the right of the existing “Hours” and “Fuel” tabs. The new tab is labeled “Odometer”.

The table on the “Odometer” tab has three columns displayed:

1. **Date** – this column displays the date the odometer was collected
2. **Odometer** – this column displays the odometer value (“totalDistanceTraveled”) on the specified date.
3. **Daily Travel** – this column displays the change in the odometer value from the previous date.

The unit of measure that is displayed (“Miles” v. “Kilometers”) is determined by the user’s Unit of Measure preference.

Above the table, there is a graph displayed - the following graph data/selectors are shown:

- **Metric** – this always displays the text “Odometer” when on this tab
- **View** – this is a drop-down selector that allows the user to select to view the graph as either a “Bar chart” or a “Line chart”
- **Unit** – this displays the unit of measure that is being used to display the odometer date (this is based on the user’s unit of measure preference, and is either “Miles” or “Kilometers”).

### Fleet List Utilization Page

An “Odometer” tab has been added to the “Assets: Utilization” page, with the new tab displayed between the existing “Fuel” and “Benchmarking” tabs.

The table on the “Odometer” tab has three columns displayed:

1. **Asset** – this column displays the asset image, as well as the Asset ID/Serial Number/Make & Model information for the specific asset
2. **Total Travel** – this column displays the latest total distance traveled for the asset, based on the date selected

The unit of measure that is displayed (“Miles” v. “Kilometers”) is determined by the user’s Unit of Measure preference.

Above the table, there is a graph displayed – with the following graph data/selectors shown:

- **Metric** – this always displays the text “Total Travel” when on this tab
- **View** – this is a drop-down selector that allows the user to select to view the graph as either a “Bar chart” or a “Line chart”

- **Unit** – this displays the unit of measure that is being used to display the odometer date (this is based on the user’s unit of measure preference, and is either “Miles” or “Kilometers”).
- **Add Additional SMU Value for Assets – “Odometer”**
    - The SMU data that is returned to MCC includes information specific to Service Meter values measured in “Hours”, a separate reading for “Odometer”, and finally a “generic” SMU value.
    - Connected assets always have an “Hours” based SMU value, but could also return additional SMU values – like “Odometer”. In instances where both “Hours” and “Odometer” are returned, we display both measures. If only one is returned, then only that single SMU value is displayed.
    - Unvalidated assets should only return a single SMU value – either “Hours” or “Odometer”, in most cases. Therefore, there is only be a single SMU value displayed.
    - If an asset has neither an “Hours” SMU value, nor an “Odometer” SMU value returned – then the “generic” SMU value is displayed. This value will likely be either a “Fuel” based SMU value (“Gallons”/“Liters”), or “Kilowatt Hours”.
    - For connected assets that return both an “Hours” and an “Odometer” SMU value, the odometer value is displayed under the “Hours” SMU value in the “Asset Details” dashboard.
    - The “Service Meter” label displays with a “pencil” icon to the right of the label, that when clicked opens the “Edit Asset” modal – allowing the user to update the service meter value(s) manually.
    - For both the “Hours” SMU value, and the “Odometer” SMU value, the numeric value includes the “unit of measure” label. The “Odometer” SMU value label will be either “Miles” or “Kilometers” (based on the users selected user preference).
    - Beneath the SMU value, there is the “Last Update”. After the “Last Update” text, we display the date and timestamp associated to the data point.
    - If the screen resolution is smaller, some of the items in the “Asset Details” dashboard wraps into a second row. When this occurs, the “Odometer” SMU value is not one of the items that “wraps” – but instead, the odometer SMU value remains anchored beneath the “Hours” SMU value.
    - When viewing the “Asset Details” page on a mobile device, an asset that returns an “Odometer” SMU value displays the odometer SMU value to the right of the “Hours” SMU value.
    - When viewing assets on the “Assets: List” page (only on the “**Grid**” view) – assets also display “Odometer” SMU values if both “Hours” and “Odometer” are returned.
    - Those assets with an “Odometer” SMU value returned display the odometer information between the current “Service Meter” (Hours) information, and the asset “Location” data.
    - The “Odometer” data displays with the label – “Odometer:”, with the actual numeric value and unit of measure label displayed to the right of this label.
    - Just as with the “Service Meter” display, the “Odometer” data displays with the “Last Update:” information in the row beneath the odometer value. Just as with the display on “Asset Details” pages, the “Last Update” information includes the date and timestamp for the latest data update.
    - The Odometer data is displayed based on the user’s preference - SI units or US standard:
      - SI Units selection = Kilometers
      - US Standard selection = Miles

- **Add “Odometer” and “Location” to Utilization XLS Downloads**



**1. On the “Asset Details – Utilization” page - for XLS downloaded files:**

- (a.) A new column for daily (last known) “**Location**” (like on Location portlet) has been added - inserted after the “Service Meter UOM” column.
- (b.) A new column for a daily “**Odometer**” value has been added (inserted after the new “Location” column).
- (c.) A new column for “**Odometer UOM**” has been added (inserted after the “Odometer” value column).

**2. On the Fleet “Utilization” page - for XLS downloaded files:**

- (a.) A new column for “**Total Travel**” has been added - inserted before the “Work Fuel Burn” column.

- **“Assets: Health” (Inspections) - Add “View Executive Summary PDF” Option to “Actions” drop-down**

- On the “Assets: Health” page, under the “Inspections” tab – the “Actions” drop-down for each asset should display with the following options:
  - 1. “Add Task”
  - 2. “View Form Order PDF”
  - 3. “View Severity Order PDF”
  - 4. “View Actionable PDF”
  - 5. “View Executive Summary PDF”
  - 6. “Request Service”
  - 7. “Buy Parts”
- With the new “View Executive Summary PDF” option displayed between “View Actionable PDF” and “Request Service”.

**June 2021**

- **Add “Cancelled Request” Date/ Timestamp in “Registration Report” Excel downloads & “Cancelled Request” state on page**

- A new “Email Address” column has been added to downloads of the Registration Report. A new “Cancelled Requests” column has been added to downloads of the “Registration Report”. The new column is between the existing “Validated” and “Unvalidated Days” columns.  
New Cancellation Reason & Cancelled By columns are added after the Cancelled Requests column.
- The cells in the new “Cancelled Requests” column display the time a request was rejected by an Admin.
- The time shown includes the date, and a timestamp.



- A "Cancelled Requests" status has been added within the drop-down on the "Registration Report" page.
  - The "Rejected" column name on the "Dealer Report" tab is updated to read "Cancelled".
  - The "Average Rejected Days" column name on the "Dealer Report" tab is updated to read "Average Cancelled Days".
  - Update the label for "Rejected" on the "Status Chart" tab to read "Cancelled"
- **Update Descriptive Text in “Add Asset” and “Add Multiple Assets” Modals**

- In the “Add Asset” modal, for an unvalidated user:
  1. New descriptive text displays in the “Add Asset” modal.

**Note: We noticed your dealer has not yet associated you to a Dealer Customer account. You may not need to add assets manually, as these will be automatically reflected upon account association. You can remind your dealer of your pending validation by using the Actions drop down after clicking [Here](#).**

The last part in the text "clicking Here" is a hyperlink to the user's "Accounts and Settings: Dealer Accounts" page.

2. The radio button options that allow the user to send information to a Dealer have been removed.

If a user wishes to proceed after being given the option to “Remind Dealer” on Validation, the “Add” action only update the unvalidated asset in MCC and does **NOT** notify their selected Dealer **NOR** does it create a “Dealership Task”.

- In the “Add Multiple Assets” option:
  1. The descriptive text has been updated with the same text as in the “Add Asset” modal – with the same ability to click over to the user's “Dealer Accounts” page.

**Note: We noticed your dealer has not yet associated you to a Dealer Customer account. You may not need to add assets manually, as these will be automatically reflected upon account association. You can remind your dealer of your pending validation by using the Actions drop down after clicking [Here](#).**

2. If a user wishes to proceed after being given the option to “Remind Dealer” upon Validation – the “Upload” action only updates the unvalidated asset(s) in MCC and does **NOT** notify their selected Dealer **NOR** does it create a “Dealership Task”.

- **Maintenance – Update MCC Code to Allow Dealers users with Planned Maintenance elevated access to Create/Update/Delete Status Flags**

- Dealer user with Planned Maintenance elevated access can Create/Update/Delete status flags.

ADMINISTRATION: MANAGE MAINTENANCE STATUS FLAGS

Status Name

Status flag1 ▲

\* Status Name

Status flag1

---

sdfsdfdf ▼

testqa ▼

Maintain up to 10 status flags at a time.

Save

- **QR Codes – Add Optional “Site Location” Field to “Asset Details” for QR Code**
  - An optional “Site Location” field has been added to the “Asset” tab on the “Assets: QR Code” page. This new field is placed to the right of the “Modal” field --- directly under the “Service Meter Value” field.
  - The new “Site Location” field is a free-text field, and is an optional field.
  - The “Site Location” field has a maximum of 64 characters.
  - The “Site Location” field has an information icon (dark-gray question mark) that displays at the end of the “Site Location” field. When a user hovers over the information icon, there is a tool-tip displayed that includes the following text: “This optional field is best used for stationary assets or Site identification.”

May 2021

- **Remove SOS Capability - grant SOS access by default to all new and existing users**
  - As any administrator user role:
  - On all of the following administration screens the SOS check box option is On and disabled.
  - The SOS check box should not be editable by any user role.
  - SOS sub-capabilities should remain the same.
    - Manage Fleet should be check on by default, and should not be editable.
    - Person Linking should be checked off by default and should remain editable.
  - **Dealer Companies**
    - All new dealer companies by default have the SOS capability turned on.
    - On the Administration: Dealership Configuration: Dealership Setup screen the SOS check box is On and not editable.
- **Add a "Buy Parts" button to Multiple MCC pages**
  - A static Primary location “Buy Parts” button as static Primary location on 3 fleet pages - a "Generic" button to PCC implemented like Quick Link is.
    - Assets List
    - Assets Health
    - Assets Maintenance

- The generic "Buy Parts" button uses the same logic as is used for the "Buy Parts" link on the MCC "Quick Links" sections on the "Overview" page.
  - A "Buy Parts" deep link (Serial Number specific) has been added to the "Actions" dropdown, for all 4 of the tabs on the "Health" Pages. (this applies for both Fleet Health and Asset Details Health)
- **Asset Details - Remove Asset Search Drop-down & Update Asset Info Display**
    - The "asset search drop down" on the "Asset Details" page has been removed.
    - The custom code for double-clicking the asset information for copying has been removed.
    - The asset information text on the "Asset Details" page has been updated to display as detailed below:
      - If a user is logged in to MCC
    - When the user is drilled into a specific asset, viewing the "Asset Details" page
      - Then the user sees 2 textual lines above the image location
        - the first line is Asset ID - which is editable
        - the pencil icon ("edit") displays after the Asset ID field
        - the second line displays as ["Serial Number" - "Equip Make" "Model"].
        - Neither of the lines are hyperlinked
        - Both lines are easily copy-able with the user's mouse
    - When a user switches the customer selected, while an asset is selected - the user is shown the drop-down search field for assets (like it does today).

#### **Enhancements to the B2C Telematics invoice (.CSV to XLSX file type and field renames)**

- When I download an Invoice XLSX file the file format is in XLSX file format instead of the former CSV file format. The file name has changed from INX-XXXXX\_ID.csv to Invoice202101\_INX-XXXXX.xlsx
- On the Operations: Telematics Invoices screen the Invoice Date column name has changed to Invoice Period.

From: Invoice Date  
To: Invoice Period

From: MM DD, YYYY                      Example: Nov 1, 2020  
To: Month Name-YYYY                  Example: November-2020

#### **April 2021:**

- **Update "Emissions Information" Modal to Display Certificate Information**
  - The "Emissions Information" modal displays the asset emissions information in 3 columns.
  - The third column is for the display of emission certifications.
  - If no "certificationBody" text is returned then the column is blank for that asset.



- If there is text returned in the “certificationBody” call, then that text displays in the third column. The text is a link to the URL defined in the “filePath” call.
- **Default timestamps to UTC timezone when no timezone could be determined because lack of Location data**
  - As any user role on the Assets: Health screen Fault Codes tab AND on the Asset Details: Health & Maintenance: Alerts screen Fault Codes tab in the Date column the fault code record time stamp is displayed for recognized generator assets.
  - Fault Code record time stamp values are Not displayed on the Asset Details: Overview screen Dashboard or Timeline tabs - which should remain & thus is out of scope for this story.
- **Registration Report – Update Icon Colors for “Pending” and “Rejected”**
  - The icon shape and size has not changed, but the colors have been updated as follows:

### **Pending Validation**

Yellow for all open / pending requests.



### **Rejected**

Grey icon for Rejected requests

If the request has been rejected, the icon displays as grey.



No changes to the green checkmark icon for “Validated” items.



No changes to the grey “User has not completed selecting a dealer” icon.



- **Planned Maintenance Interval Name and Part Number max length increased to 150**
  - The maximum number of characters allowed for an interval name has been increased to 150 characters.
  - The 150 character limit applies to anywhere a Maintenance interval name is displayed, and also is applied as the maximum character limit for the “Title” field in the following modals:
    1. “Add Service Level”
    2. “Add Independent Interval”
    3. “Add Major Component Interval”
    4. “Add Backlog Item”

5. "Edit Service Level"
  6. "Edit Independent Interval"
  7. "Edit Major Component Interval"
  8. "Edit Backlog Item"
- The maximum number of characters allowed for a Part Number has been increased to 150 characters.
  - The 150 character limit applies to anywhere a Part Number is displayed, and also is applied as the maximum character limit for the "Part Number" field in the following modals:
    1. "Add Service Level"
    2. "Add Independent Interval"
    3. "Add Major Component Interval"
    4. "Add Backlog Item"
    5. "Edit Service Level"
    6. "Edit Independent Interval"
    7. "Edit Major Component Interval"
    8. "Edit Backlog Item"
  - The "Job Operations" modal (both the "Preview Steps" tab, and the "Buy Parts" tab) has been updated to allow for the display of a "Part Number" that is up to 150 characters in length.
  - **Allow duplicate step names in Interval definition**
    - The MCC code has been updated to allow for duplicate names within the checklist of steps in the "Edit" modals for all interval types ("Service Level", "Independent Interval", "Major Component Interval", and "Backlog Interval").
    - When an interval includes a checklist of steps, the user is able to "Copy" that interval, even if the checklist names are duplicates.

#### March 2021:

- **Missing Account Information pop-up**
  - After a user logs in, MCC checks their account for the following:
    - (1.) First Name
    - (2.) Last Name
    - (3.) Email address
    - (4.) Phone number
    - (5.) Country
    - (6.) Company
  - If any of these fields are missing, MCC displays a "User Information" page, ahead of the normal registration flow.
  - The top of the new "User Information" page reads: "We need some additional information about your account to get you set up in My.Cat.com correctly. Please fill in any missing information."
  - Beneath this text, there are input fields for each of the following:
    - Email
    - First Name
    - Last Name
    - Phone
    - Country
    - Company

- Those fields for which MCC already has data are prefilled with what we currently have stored in the system.
- The user is not be able to proceed further until updates are made to provide data for all of the required fields.
- If the user has not provided all of the required fields, and clicks the “Continue” button – then red validation error messages display beneath the field input lines for any missing data.
- After clicking the “Continue” button (all if all required fields are filled in) the user is taken to the next step in the MCC registration flow that they have not yet completed.
- If all steps have been completed, then the user is taken to their selected MCC homepage.
- **Dealership email configuration – indicate fields which are also used by CAT App actions/requests**

- As a dealer or employee admin user on the Administration: Dealership Configuration screens:

**1. On the Administration: Dealership Configuration screen - General tab**

The introduction user message has been updated to:

These parameters are used by the **My.Cat.com** portal and the **Cat® App** to ensure that your customers have a seamless experience. Please ensure that the values stored are accurate and reflect how you want your customers to interact with the portal information. The Access Requests from Customers email field is also used by the **Cat® Inspect App** for customer initiated registration requests.

**2. On the Administration: Dealership Configuration screen - Equipment Notification tab**

The introduction user message has been updated to:

The system will send an email to the following addresses when the customer updates the Asset ID. These emails will notify you when a piece of equipment is divested and/or when a piece of equipment has been added using tools within the **My.Cat.com** portal or the **Cat® App**. Please enter a valid email address below so we can notify the appropriate department of the customer’s actions.

**3. On the Administration: Dealership Configuration screen - Service Request Notification tab**

The introduction user message has been updated to:

The system will send an email to the following addresses for each of the following types of requests for service that the customer can initiate via the **My.Cat.com** portal or the **Cat® App**. To ensure that you receive the email notifications, please enter valid email addresses for each of the following.

**4. On the Administration: Dealership Configuration screen - Quote Request Notification tab**

The introduction user message has been updated to:





The system will send an email to the following addresses for each of the following types of requests for quotes that the customer can initiate via the **My.Cat.com portal** or the **Cat® App**. To ensure that you receive the notifications, please enter a valid email address for each of the following.

#### 5. On the Administration: Dealership Configuration screen - **Rental Request Notification** tab **Do Not Make Any Changes**

The introduction user message text remains:

The system will send an email to the following addresses when the customer has requested to call off rent or extend rent on a piece of equipment through the My.Cat.com portal. To ensure that you receive the notifications, please enter a valid email address for each of the following.

- **Hide Assets in Customer Fleet subscribed to e-Routes**
  - Customer's assets that are subscribed to e-Routes do not display in the customer's fleet list.
- **"Cat Rewards" portlet – Error Message Displayed for 401 or 500 Error & UI Update**
  - A standard red-bar error message is displayed to the user ("Account & Settings" page – on the "Cat Rewards" tab) if the "Cat Rewards" service returns a 401 or 500 error.
  - The MCC generic/non-specific error message should read: "An error has occurred. [Click here](#) to contact support."
  - No "Rewards" badge is displayed if a 401 or 500 error is returned.
  - No "Enroll" button displays if a 401 or 500 error is returned.
  - If the customer user is supposed to see both their own "Cat Rewards" points, and those of their associated company – then the totals and "badge" graphics display side-by-side.
- **Utilization - MCC Hours & Fuel precision alignment**
  - Hours (Composing of Service Meter Reading Latest, Working Hours, Idle Hours, and Daily Service Meter Readings), Fuel Burn, and Fuel Burn Rate based values are rounded to 1 decimal.
  - Asset Details Service Meter Hours Latest (currently with rounded whole hour) are rounded to 1 decimal.
  - Service Meter Reading (Daily Utilization) are rounded to 1 decimal.
  - Fuel Burn Rates (per time) values are rounded to 1 decimal.
  - % based values (Fuel Level, DEF Level, Run %, Idle %) show the whole value %.
- **Update consent statement for marketing communications opt in/out**
  1. As a new registering user on the new user registration: End User Agreement screen the consent statement for marketing communications opt in/out has been updated to:

#### **New text:**

I'd like to receive future marketing (e.g. new product information, promotions) communications (e.g., email, text and phone) from Caterpillar (Caterpillar Inc. and its affiliates & subsidiaries). You can withdraw your consent at any time. Regardless of whether you decide to receive these marketing communications, Caterpillar will continue



to send service/transactional messages, including those that have to do with any accounts you may have with us. Please refer to our Global Data Privacy Statement for more information about Caterpillar's data privacy practices and rights that you may have.

**Make the text:** "Global Data Privacy Statement" a link to:

URL: <https://www.caterpillar.com/dataprivacy>

Clicking the link opens this URL in a new browser tab.

2. As a validated customer user or Cat employee user on the My Activity: Fuel Program: Enrollment screen update the consent statement for marketing communications opt in/out has been updated to:

**New text:**

I'd like to receive future marketing (e.g. new product information, promotions) communications (e.g., email, text and phone) from Caterpillar (Caterpillar Inc. and its affiliates & subsidiaries). You can withdraw your consent at any time. Regardless of whether you decide to receive these marketing communications, Caterpillar will continue to send service/transactional messages, including those that have to do with any accounts you may have with us. Please refer to our Global Data Privacy Statement for more information about Caterpillar's data privacy practices and rights that you may have.

**Make the text:** "Global Data Privacy Statement" a link to:

URL: <https://www.caterpillar.com/dataprivacy>

Clicking the link should open this URL in a new browser tab.

3. Translations

The consent statement text appears in the user's selected language for those languages which the consent statement has been translated.

- **Invite User Contact Email Address List / Logic – Enhancement**

- The text in the email is populated with the sole email of the administrator that initiated the "New User" invite.
- **The text below the yellow "Register for My.Cat.Com" button reads:**  
"Your registration also includes access to Cat® App for fleet management. Working as a complement to My.Cat.Com, it is great for those on the go. Available in the App Store or Google Play.
- Contact <name of administrator sending invite> from <company name> with any questions at <email address of admin sending the invite>."

**February 2021:**

- **"Manage Customer Users" – Display Message When Customer UCID has been Deleted**
  - A message is displayed on the "Customer User" and "Invitations" tabs (on the "Manage Customer Users" page) when a UCID associated to a customer user has been deleted.
- **Maintenance – Updates to the "Maintenance Settings" Page**

- Assets configured in VisionLink are restricted to only 2 possible SMU values – “Hours” and “Odometer”.
  - Assets configured in VisionLink cannot have their SMU value changed to track using “Fuel” or “Power”.
  - Assets configured in VisionLink cannot be designated as an “Absolute Interval” within MCC. The “Absolute Interval” checkbox does not display in the “Service Level” section for VisionLink assets.
  - When attempting to “Copy” a maintenance interval for an asset originally configured in VisionLink, only those intervals that are tracked using SMU values in “Hours” or “Odometer” can be copied “to”.
  - A MCC user can “Copy” a maintenance interval from any asset, but those assets that were configured in VisionLink can only be “copied to” if the interval’s SMU is “Hours” or “Odometer”. Assets that are configured using “Fuel” or “Power” are not included in the list of assets to potentially be copied to.
- **Maintenance - Integration of PM - VisionLink and MCC**
    - The MCC code should now allow users to Create/Update Maintenance services for eligible assets that were onboarding in VisionLink.
    - With the changes from PMM, users should now be able to do the following for VisionLink assets in MCC:
      1. Start/Stop the tracking of an asset configured in VisionLink.
      2. Enable/Disable the tracking of an asset configured in VisionLink.
    - For Assets configured in VisionLink, “Service Level” intervals cannot be designated as an “Absolute Interval” within MCC.
    - The “Absolute Intervals” checkbox option does not display within the “Edit Maintenance Settings” modal if the asset was originally configured in VisionLink.
    - Assets configured in VisionLink are restricted to only 2 possible SMU values – “Hours” and “Odometer”. Assets configured in VisionLink cannot have their SMU “Frequency” value changed to track using “Fuel” or “Power”.
    - When attempting to “Copy” a maintenance interval for an asset originally configured in VisionLink, only those intervals that are tracked using SMU values in “Hours” or “Odometer” can be copied “to”.
    - A MCC user can “Copy” a maintenance interval from any asset, but those assets that were configured in VisionLink can only be “copied to” if the interval’s SMU is “Hours” or “Odometer”. Assets that are configured using “Fuel” or “Power” would not be included in the list of assets to potentially be copied to.
  - **Administration: New User Invitations page – UI updates and Service changes**
    - The “Administrator Initiated Accounts” page is now titled “New User Invitations”.
    - The report definition text that displays on the page reads:
 

**This report provides a list of user accounts pre-validated to a Customer UCID from "Invite New User" in the Administration: Manage Customer Users page. The Accepted Invitations tab represents finalized user accounts. The Pending Invitations tab represents open invitations awaiting user account completion.**
    - The “Added Accounts” tab (the first tab) is updated to display as “Accepted Invitations”.



- The MCC service no longer saves the “Admin. Created Name” or “Cat Req ID” to the database table for the information displayed on the “Dealer Tasks”, “Registration Report”, and “Add Existing Users” pages/modals.
- Our service sends a NULL CAT REC ID when the account is not created/validated by an Admin.
- Currently we do not send ADMIN Name, in future/after this change we should also be sending NULL to CAT REC ID.
- The “New User Invitations” page displays the following on the two different tabs:
  1. Accepted Invitations = Completed invitations
  2. Pending Invitations = Open Invites

## January 2021:

- **“Administrator Initiated Accounts” page now displays “Pending Initiations” tab**
  - The “Administration: Administrator Initiated Accounts” page has been updated to have two separate tabs – (1.) “Add Accounts”, which displays the current page, and (2.) “Pending Invitations”, which is a new screen that displays all of the current open invitations.
  - Dealer Admin users only see the rows associated to their dealership. Employee users see all rows.
  - **“Added Accounts” tab**  
 The “Administrator Initiated Accounts” page displays with two tabs – the first tab displays as “Added Accounts”.  
  
 The page content on the “Added Accounts” tab is what is already currently displayed on the “Administrator Initiated Accounts” page.
  - **“Pending Invitations” tab**  
 A second tab has been added to the “Administrator Initiated Accounts” page, which is labeled “Pending Invitations”.  
  
 The “Pending Invitations” tab has the same “Date Range” and “Dealer” drop-down selectors as those shown on the “Added Accounts” tab. In addition, the download, and “Search” field also carryover to the “Pending Invitations” tab.
  - Above the table, the following text is displayed:  
  
**“This report provides a list of open invitations that were sent by a dealer or customer admin.”**
  - The table on the page contains the following columns:
    - (1.) Customer Users
    - (2.) Administrator
    - (3.) Role
    - (4.) Capabilities
    - (5.) Invite Sent
    - (6.) Company (both Name & UCID #)
    - (7.) Dealer
    - (8.) Actions (drop-down should include Cancel Invite/Resend Invite/Edit information)

- Clicking on the “Actions” drop-down opens a menu that allows the user to – (1.) “Cancel” the invitation, (2.) “Resend” the invitation”, or (3.) “Edit” the information included in the invitation.
- **Maintenance – users can access historical PM completion data back to Jan. 1, 2012 and out 18 months**
  - The “Date Range” selector on the “Maintenance” page has been updated to allow the following:
    1. A user can go back to Jan 1, 2012. This is the maximum the user can go back for the “Start Date”.
    2. A user can go forward (for the “To Date”) up to 18 months (dynamically) from the current date.
  - If a user chooses a date range that is “greater than 12 months” for a time frame, MCC displays a message stating it will take time to generate the data.

The message displayed reads: “The data for the chosen date range will take some time to retrieve.”

- **Display of a success/failure message when the SMU value is updated manually**
  - A message is displayed that lets the user know if the service meter update was successful or not.

**Error Message** - "An error has occurred. Cat Digital Support will be sent a notification."

**Success Message** - "Your request to update the service meter has been successfully submitted. My.Cat.com will attempt to update the service meter on your Product Link device during its next telematics communication. The updated service meter value will not be displayed until then."

- **Add context to Dealership Configuration: Rental Notifications - Fast-Iron note**

- As a dealer or Cat employee user on the Administration: Dealership Configuration: Rental Request Notification screen. The user message text has been updated to:

"The system will send an email to the following addresses when the customer has requested to call off rent or extend rent on a piece of equipment through the portal. To ensure that you receive the notifications, please enter a valid email address for each of the following.

Note: the below applies only for those dealers integrated with Fast-Iron Vendor who manages Rental and Warranty data. Your dealership and customers may not be applicable for these options."

- **“Manage Customer Users” – display “Unknown” when an Admin user has been deleted from LDAP group**
  - Rather than have the page error out when the system cannot find the name of the person who sent the invitation within the LDAP group – display “Unknown” in the “Administrator” column for the person who sent the invitation.
  - If a null response is returned for the name of the person who sent MCC invitation, then “Unknown” is displayed in the “Administrator” column on the “Invitations” tab.

#### November 2020:

- **Maintenance – Allow Manual Maintenance & Non-Manual Maintenance Assets to be Started/Stopped**
  - Enabled Manual Maintenance, and non-Manual Maintenance assets can be “Stopped” and/or “Started” with the toggle in the “Maintenance Settings” modal.
  - The tool-tip text has been updated to read: "Only enabled assets can be started or stopped in My.Cat.com."

- **“Invite New User” flow – Add Customer Email Address to “MCC User Invitation Accepted” Email**

- The text of the “MY.CAT.COM/CAT APP USER INVITATION ACCEPTED” email has been updated to read as follows:

The following user has accepted their invitation and is now a validated user within their company.

Name: <First Name> <Last Name>  
 CWS Username: <Username>  
 Email: <Email Address>

<UCID Name>  
 <UCID Number>

Please consider granting any extra access this user may require:

- Parts.Cat.Com / PartStore
- SIS
- any others

Sincerely,

The Caterpillar My.Cat.Com Team

- **Invite New User - Add New Fields to “Invite New User” Modal & Default Values to “Sign-Up” Page**
  - Beneath the “Email” field, the following additional input fields have been added:
    - First Name
    - Last Name
    - Country
    - Phone number
    - Phone country



- When a user clicks the “Add Another” link, the information for the first new user invited contracts, and there are fields for a new user to be entered. The contracted section for the previous user displays the email address that was entered for the user (the only required field).
- The information that is entered in the “Invite New User” modal for the invited user is stored – and when the user enters the registration (“Sign Up”) flow from the link provided in the invitation email, several of the input fields are pre-populated with the data that was entered in the “Invite New User” modal.
- The prepopulated fields in the “Sign Up” screen include the following from what was entered in the “Invite New User” modal:
  - Email
  - First Name
  - Last Name
  - Country
  - Phone number
  - Phone country
- If the new user invitation is still pending, a Dealer Admin or Customer Admin user can edit the invitation by selecting the "Edit Information" option from the "Actions" drop-down on the "Manage Customer Users" screen (Invitations tab).
- The "Edit Information" modal should now include the following fields, which can be updated:
  - First Name
  - Last Name
  - Country
  - Phone number
  - Phone country

#### October 2020:

- **Legal – Remove the “Data Privacy Notice” Acknowledgement from the MCC Landing Page**
  - Within the pop-up overlay that displays at the bottom of the My.Cat.Com “Landing Page”, the “When using this website, you be asked to provide some personal information to help fulfill your request. By continuing to use this site, you acknowledge having read the My.Cat.Com Data Privacy Notice” text – and the “I AGREE” button associated to this text have been removed.
  - The text, and associated button related to the “Cookie Statement” still displays.
- **Legal – Update the “Cookie Statement” Banner Text on the MCC Landing Page**
  - The “Cookie Statement” banner text that displays at the bottom of the My.Cat.Com Landing page has been updated to read as follows:
 

“This site uses cookies to create a better experience for you. Some of these cookies are set automatically because they’re necessary for the site to perform. Other cookies are used for functional, performance, and targeting purposes to enhance your experience by personalizing content and ads, enabling third party content and features, and enabling us to analyze how this site is used. To learn more, please visit our [Legal Notices - Cookie page](#).

By clicking 'I Agree', you are agreeing to our use of functional, performance and targeting cookies.”
- **Legal – Update “Data Privacy Notice” Text**



- The “Data Privacy Statement” content has been updated to reflect the updated text.

## Privacy Notice for My.Cat.Com

**Last Revised: May 6, 2020**

This privacy notice describes how **Caterpillar** collect(s), share(s), and process(es) personal information through **My.Cat.Com**; this notice is consistent with Caterpillar’s Global Data Privacy Statement and provides additional details relevant to **My.Cat.Com**. Caterpillar’s Global Data Privacy Statement, which should be read with, and treated as part of this notice, is available at <http://www.caterpillar.com/dataprivacy>.

What personal information does **My.Cat.Com** collect and process, and why?

### User-Provided & Collected Information

**My.Cat.Com** is an interactive website that provides to users information and offers for **Caterpillar** products and services. We collect information about your computer, your use of the **My.Cat.Com** website, and may collect or receive user provided personal information as you interact with us in order to optimize your user experience or address your request. Examples of how your information may be used (but not limited to) include the delivery of marketing communications or promotional materials, improvements to the website, products, and services we provide, and detecting, preventing, and responding to misuse of the website (ie. fraud, violation of law, etc.).

Personal information is any information about a specific individual or that identifies or may identify a specific individual. Some additional information we may collect includes contact and relationship or role.

- **Contact information** allows us to interact and communicate with you.
- **Relationship or role information** helps us understand who you are and what you are seeking to properly fulfill your request.

We may share personal information with our affiliated companies, suppliers, dealers, and business partners which may use it for the purposes listed above.

Users are advised that information provided may be cross referenced with other information you have provided to us. For example, if you provide your contact information we may be able to provide additional information on products you own and services you use.

**My.Cat.Com** may directly authenticate or connect a user to an authenticated (or logged in) experience based on the user’s digital activity or data inputted by the user. An authenticated experience occurs when a set of log-in credentials are obtained from the users and will allow for additional access and experiences not allotted to non-authenticated users. In these circumstances an anonymous user is not acceptable or allowed. Common authenticated users include Caterpillar and Dealer personnel, customers, & affiliates. In an authenticated experience we collect the information discussed in the section above which will now be tied to an authenticated account profile and additional information associated with the account profile. In the event the user provides personal information on behalf of another individual the user should ensure proper consent is obtained from the individual. Examples of how this information may be used (but not limited to) include requesting, accessing, and managing Caterpillar systems, services, or programs.

Some additional personal information we may collect includes personal preferences and authenticated account information.

- **Personal Preferences** allows us to provide an experience adjusted to the way you prefer to ingest content.
- **Authenticated Account Information** is an identity profile which is requested or created by the user and collected by Caterpillar to ensure you are an authorized user.

### Do Not Track Signals

At this time, **My.Cat.Com** does not respond to “Do Not Track” signals that may be sent by your browser. We may revisit this as standards develop on how such signals should be interpreted and applied.



## Cookies

Cookies and other tracking technologies, in general, are used to improve website and application efficiency, enable better processing of information, and for various other reasons. To learn more about **My.Cat.Com's** usage of cookies please refer to the cookie notice by selecting "Cookies" on the website or application website.

## Third Party Integration, Services, and Tracking

We may link to third party solutions that enable third-party companies to collect certain information when you visit this Site. These companies use non-personally-identifiable information (e.g., click stream information, browser type, time and date, subject of advertisements clicked or scrolled over, hardware/software information, cookie and session ID) and information that may allow for identifying you (e.g., static IP address) during your visits to this Site and other websites in order to provide advertisements for products likely to be of greater interest to you or advertising-related services, such as ad delivery, reporting, attribution, analytics, and market research. These third parties typically use a cookie, pixel tag, web beacon or other similar tracking technologies to collect this information. For example, in the course of visiting our site, these third parties may place or recognize a unique cookie on your browser in order to collect certain information about you and your interest in our Products and could be used to show you ads on other websites based on your interests. This information may also be used to relate devices which belong to the same user (based on user behavior or other information collected) or re-identified to an individual user (e.g. an email address). More information on these is available in our Cookie Disclosure. This includes:

- Microsoft's Bing Ads - Bing Ads collect user information (including personally identifiable information) from Microsoft online properties, apps and other technologies like tags, pixels or unique tracking codes ("Bing Ads User Data"). Microsoft uses Bing Ads User Data for purposes of delivering Bing Ads including, where applicable, retargeting and conversions. Microsoft uses Bing Ads User Data for its own purposes, including to improve its services. To learn more about how Microsoft collects, uses and processes personally identifiable information, including information on how to control the use of your data for interest-based advertising from Microsoft, please see its Privacy Statements at <https://privacy.microsoft.com/en-us/privacystatement>.
- Facebook Ads – Facebook collects user information (including personally identifiable information) from Facebook, Instagram, Messenger and other products and features offered by Facebook apps and other technologies like tags, pixels or unique tracking codes ("Facebook User Data"). Facebook uses Facebook User Data for purposes of delivering Facebook Ads including, where applicable, retargeting and conversions. Facebook uses Facebook User Data for its own purposes, including to improve its services. To learn more about how Facebooks collects, uses and processes information and how you can manage or delete information about you please see its Data Policy at <https://www.facebook.com/about/privacy>.
- Google's Google Analytics - Google Analytics is a third party analytics service. We use Google Analytics to collect information about the use of this Site. Google Analytics collects information on visitor behavior on this Site such as how often users visit this Site, what pages they view when they do so, and what other websites they used prior to coming to this Site. We use the information we get from Google Analytics to analyze user behavior, improve Site performance, personalize the user experience, and analyze the effectiveness of our marketing campaigns. Google Analytics collects only the IP address assigned to you on the date you visit this site, rather than your name or other identifying information. Google Analytics anonymizes the IP address before it is stored. We do not receive the non-anonymized IP address. We may combine the Google Analytics data with first and third-party data information which may include personally identifiable information. Although Google Analytics plants a permanent cookie on your web browser to identify you as a unique user the next time you visit this site, the cookie cannot be used by anyone but Google. To learn more about how Google collects and uses data, visit <https://policies.google.com/privacy/partners>. For opt-out options specific to Google Analytics, please visit <https://tools.google.com/dlpage/gaoptout>.

## Website Linkages



As users explore **My.Cat.Com**, they may encounter linkages to other Caterpillar and non-Caterpillar websites. Users are advised that as links are selected, they may encounter different features and experiences that may have different privacy notices and processes not associated with **My.Cat.Com**. Where can I obtain further information about **My.Cat.Com** and its privacy practices?

Please use the Contact Support Desk form available on **My.Cat.Com**.

For additional information about Caterpillar's privacy practices, including corporate contact information, please see the Global Privacy Statement at <http://www.caterpillar.com/dataprivacy>.

What happens if this privacy notice changes?

We reserve the right to amend this privacy notice. If we update or change this privacy notice, the changes will be made on this page. Your use of the Website following the posting of changes to this privacy notice will demonstrate your acceptance of those changes.

- **Account Provisioning – Update White Text on the MCC “Sign Up” Page**
  - On the My.Cat.Com “Sign Up” page (step 1 of the registration flow), the white text that displays on the image has been replaced with the following text:  
  
**“One Account. All of Cat.**  
Your Caterpillar account is the single account you use to log in to select services and applications we offer. Shop online, manage your fleet, go mobile, and more.”
  - The “One Account. All of Cat.” text is displayed in a separate line above the other text – and is in bold.
  - The remaining text is not bold, and wraps as needed to fit within the screen space.
- **Account Provisioning – Add “One Account. All of Cat” Text to MCC Sign-In Page**
  - On the MCC Sign-In page, the “Sign-In” portlet has the following text under the Cat logo:  
“One Account. All of Cat. Sign in using an existing Cat® account.”

#### **Maintenance – Interval “Frequency” Unit of Measure Editable When “One Time Only”**

- The “Add Independent Interval” and “Add Major Component Interval” modals have been updated to leave the “Frequency” unit of measure drop-down active when the “Occurs only once” option is selected.
- The “Frequency” numeric input field is inactive when the “Occurs only once” option is selected.
- When the “Occurs only once” option is NOT selected, then both of the “Frequency” input fields (numeric, and unit of measure drop-down) are active.
- When the “Frequency” unit of measure drop-down selection is changed, the unit of measure for the “First Occurrence” field changes to match the same unit of measure.

#### **September 2020:**

- **UI: Asset Details: Health & Maintenance: Alerts screen Fault Codes - move Service Meter column**
  - As any user role on the Asset Details: Health & Maintenance: Alerts screen Fault Codes tab:
    - The Service Meter column displays in the main table view before the Actions column.
    - In Desktop view with the browser window in full screen view the expand row triangle icon is not displayed.
  - In Desktop view when the browser width is reduced so that all columns of data do not fit, then columns are moved to the expanded row section. A horizontal scroll bar is not **displayed**.

**Add “Describe Service Needed” text to “Schedule General Service” email**

- The “Schedule General Service” email has been updated to include the text entered in the “Describe Service Needed” field of the “General Service Request” modal.
- A new “Service Needed” field has been added to the “SERVICE REQUEST” section of the email. This new field displays beneath the “Preferred Date” and “Service Location” fields.
- **“Asset Details: Utilization” – Show Chart Area with X-Axis and Y-Axis but No Points Plotted**
  - If the data table on the “Asset Details: Utilization” page does not have any data displayed in it (only dates shown) – then still show the chart area, but include the x-axis and y-axis, just with no points plotted.
  - If there is data displayed in the table, then the default view of the page is to display the chart area.
- **VALIDATE USER: Error while validating the Customer User when the Customer is not onboarded**
  - When the dealer tries in to add a customer user under a customer not onboarded under the dealer,
    - The Dealer should be prompted to onboard the customer first
    - Once the customer is onboarded, the delaer should be prompted to onboard the customer user.

**August 2020:**

- **Dealer “Registration Report” changes**
  - The columns in the table displayed on the “Registration Report – Dealer tab” have been updated. The values for each (excluding “Dealer”), represent a count of items in that “state” for the date range chosen.
  - “Dealer” – this column displays the dealer’s name
  - “Total” – this column displays the total count of registrations requests that the dealer has received within the date range selected. This is the total of “Validated” + “Rejected” + “Pending Validation”.
  - “Validated” – this column displays the count of registration requests that have been validated by the dealer within the date range selected.
  - “Rejected” – this column displays the count of registration requests that have been rejected by the dealer within the date range selected.
  - “Pending Validation” – this column displays the count of registration requests that are pending validation (within the date range selected).
  - “Average Validation Days” – this column displays the calculated average number of days it took the dealer to validate a registration request (within the date range selected).
  - “Average Rejection Days” – this column displays the calculated average number of days it took the dealer to reject a registration request (within the date range selected).
  - “Average Pending Validation Days” – this column displays the calculated average number of days that a registration request remained in the “Pending Validation” state (within the date range selected).
  - An information icon is displayed to the right of each of the column heading labels. Hovering over the icon displays a brief explanation for each.
  - The “Status Chart” tab has also been updated to display bar charts for the number of registration requested in the “Validated”, “Rejected”, and “Pending Validation” statuses.



- **New User “Invite” email – provide a contact name and email information**
  - Within the “Register for My.Cat.Com” and “Sign In to My.Cat.Com” emails, the email content beneath the action button has been updated as follows:
    1. The Customer Admin/Dealer Admin requestor’s name is rearranged to display as – First Name (preferred) Last Name.
    2. If a Customer Admin is sending the invitation email, their email address is displayed as the contact within the email text.
    3. If a Dealer Admin is sending the invitation email - they have to choose which email address to display, before submitting the invitation. The designated email address serves as the method by which the invited user can reach out for questions. The Dealer Admin will need to select from the options listed below:
      - a. The Inviter's email address or
      - b. The Dealer branch entered email address under "Access Requests from Customers" - associated to the Dealer Admin performing the request. If there are multiple email addresses that have been provided for the Dealer branch email address, show each of the email addresses - separated by a comma.
- **Default New Customer “Capabilities” set to match Dealership “Capabilities”**
  - When a Dealer Admin wants to add a new Customer (Company) – the checkboxes under “Capabilities” are default populated to match those for which the Dealership is configured/enabled.
- **Cat Digital Support phone numbers exposed to users**
  - In the Contact Cat Digital Support modal the introduction text has been updated to: Caterpillar is dedicated to improving your My.Cat.Com experience. Use this form to report any issues you find or enhancements you would like to see or contact us at +1-866-228-2111. We value your feedback.
  - In the Operations: Telematics Invoices portlet Billing Inquiry modal, the introduction text has been updated to: Please use this form to raise any inquiry about your invoice(s) or contact us at +1-866-228-2111. We value your feedback.

#### July 2020:

- **Add “Interval Type” to PM downloads**
  - A new column, titled “Interval Type”, has been added to the download file generated from “Maintenance” screens.
  - The information in the “Interval Type” column matches the different symbols displayed on the screen.
    - If the icon shown in “Next Service” is a STAR, the interval type in the report should read “Service Level”
    - If the icon shown in “Next Service” is a CIRCLE, the interval type in the report should read “Independent Interval”
    - If the icon shown in “Next Service” is a TRIANGLE, the interval type in the report should read “Backlog”
    - If the icon shown in “Next Service” is a DIAMOND, the interval type in the report should read “Major Component”
    - The color of the icon does not affect the value for “Interval Type” in the export report.
- **Update the “Record Service” modal UI**
  - Within the “Record Service” modal, the placeholder text for the “Type of Service Performed” drop-down field has been updated to read: “Select”.
  - For the “Machine Component Serviced” drop-down field, the placeholder text has been updated to read: “Select”.





- Only a single set of these input fields are shown on initial view of the modal.
- If a user tries to submit the “Record Service” modal without first making selections for the “Type of Service Performed” and “Machine Component Serviced” fields – validation error messages display under the fields.
- Beneath the “Type of Service Performed” and “Machine Component Serviced” input fields, an “Add Another” link has been added – that when clicked adds an additional set of the two input fields.
- Only one set of the “Type of Service Performed” and “Machine Component Serviced” fields is required, but if the user “adds another” the added fields are also required. The added fields should display with a delete (trash can) icon, so that they can be removed.
- **Update the UI for the “Schedule Service” modals**
  - The “Describe Service Needed” section has been moved higher in the modal, placing it below the “Contact Method” radio button options.
  - The “Service Location” section displays beneath the “Describe Service Needed” input field.
  - Under the “Service Location” label, there is the following text: “Please select where the machine will be located at the time of service. If the Current Asset Location displayed is not accurate, please update it.”
  - On initial display, the two radio buttons display (“Current Asset Location” and “Dealer Location”) – with neither option selected. In this state, the map for the “Current Asset Location” does not display.
  - If the user selects the “Current Asset Location” radio button option, then an input field displays with the current asset location, or a “-” if no location is known. The user can update the current location by typing in this field.
  - Under the input field, a map displays with the current asset location identified by a map pin.
  - If the user selects the “Dealer Location” radio button option, the input field and map under “Current Asset Location” do not display.
  - The text entered in the “Describe Service Needed” field has been added into the email that is sent when the “Schedule General Service” modal is submitted.
  - The input field that displays beneath the “Service Location” section in all of the other “Schedule ..” modals (Fault Codes, SOS, Inspections, and Maintenance) has been removed.

#### June 2020:

- Addition of Diesel Engine Fluid (DEF) information to “Asset Details”
  - The “Asset Details” page now includes information on both “Fuel Level” and “Diesel Exhaust Fluid Level” – for those asset that report these values.
- Display the values for “Shift All” option within “Schedule Adjustment” modal
  - The “Schedule Adjustment” modal has been updated to display the amount by which the services associated to an asset will be shifted when the user opts to “Shift all services”. This option will now display how much each subsequent service will be shifted from its current value.
- Addition of time stamp and time zone information for “Last Reported” data
  - “Service Meter” values, and “Location” data for connected assets will now display with the date the information was last updated, as well as the time of the update. In addition, the time zone for the time being reported will be displayed – so the user can know exactly when the data was updated.
- Increase the number of characters allowed for a step name for maintenance intervals
  - The “Edit” modals for each of different maintenance interval types (“Service Level”, “Independent Interval”, “Major Component”, and “Backlog”) will now have a character limit of 1,000 for each “Step Name” – increased from 100 characters.
- Display of an “alert” icon on “Operations – Rental” page for assets within 5 days of billing cycle

- On the “Operations – Rental” page, users will see a red alert icon next to the billing cycle date for any assets that have a billing cycle due date within five days of the current date. This will help users easily identify those rental contracts that will soon have a payment coming due.
- Updates to the “Schedule Adjustment” modal for maintenance
  - When a “Service Level” maintenance task is completed, a user is sometimes required to rationalize the service tasks that come after it. If rationalization is needed, the “Schedule Adjustment” modal will be displayed. The size of this modal has been enlarged to allow the user to see both their options, and the timeline preview of services at the same time. Those options that require additional inputs from the user will only show the input fields when those radio buttons are selected. This allows the user to more easily see the timeline preview without having to scroll.
- “Warranty” information visibility on “Asset Details”
  - The “Warranties” tab will be hidden from any Dealer who is not connected to Fast Iron – so they do not see empty tabs. When the “Warranty” settings for an account are turned on, the “Warranties” card and the “Warranties” selector in the “Asset Details: Overview” configuration menu are displayed - allowing the user to display or not display the “Warranties” card. When the “Warranty” settings for an account are turned off, the “Warranties” selector in the “Asset Details: Overview” configuration menu are not shown (i.e., no option to select/show the “Warranties” card)
- Addition of status flag information to maintenance downloads
  - Users are able to associate a status flag to a maintenance task, but until now the status flag information has not been included in the download generated on the “Assets: Maintenance” or “Asset Details – Maintenance” pages. Two new columns have been added to the download – one for the “Status Flag Name” and another for the name of the person who modified the status flag (“Status Flag Modified By”). These two columns have been added between the “Completed Date” and “Location” columns that were already included in the download.
- Addition of “View Fleet” link to “Manage Customer” page
  - The “Administration: Manage Customers” page now provides a “View Fleet” link for each of the customers listed. Clicking the “View Fleet” link takes the user to the “Assets: List” page for that specific customer.
- Addition of filters to the “Registration Report”
  - The “Registration Report” now has a new page filter option – “Source”. Under the new “Source” filter, the user can select the source of the registration information to show only those registrations from My.Cat.Com, Cat App, Cat Inspect, or from an External source. They can also view the data from all of the sources combined. This will help Admin users keep track of where most of the new registrations are coming from.

#### May 2020:

- Updates to screen “Filters” and “Manage Groups”
  - Persistent screen “Filters” and “Manage Groups” access: The filters applied on one page are now persistent across other My.Cat.Com pages. In addition, all existing “Groups” will be available in the “Edit Filters” modal on all pages that allow filtering. In addition, through a “Manage Groups” link within the “Edit Filters” modal – users can now easily create/edit groups on any page with filters, not just the “Assets: List” page.
  - Updated “Manage Groups” page: By clicking the “Manage Groups” link within the “Edit Filters” modal, or the button on the “Assets: List” page – a user can access the “Manage Groups” screen to create a new group, or edit an existing group. Users can select from a list of “Available Assets” to add to their group, with those that have been selected listed on the right side of the screen.



- Applied “Filters” Displayed Next to Page Title: Any filters that are currently applied to a page will be displayed separately next to the page title. Users can remove a filter by clicking the “X” in the tile next to the page title, or within the “Edit Filters” modal. The “Filters” button on the page will show the total number filter categories that current have a filter selected. Users can have multiple filters applied within a single category, so the number displayed may not match the total number of filter tiles displayed.
- “Assign Inspection” option added to “Summary” and “SOS” tabs
  - There are two new places that users can now assign an inspection for their asset. This option links to Cat Inspect and prepopulates information about the asset. The “Assets: Health” page displays a “Summary” tab, and individual tabs for each of the different “Health” related items. Users can now assign an inspection for an asset from the fleet level “Actions” menu for “Fault Codes” and “SOS” items. Those items that display on the “Summary” tab because of an “SOS” or “Fault Code” item will also have the “Assign Inspection” option in the “Action” drop-down on the “Summary” tab.
- Ability to edit a “Backlog” maintenance task
  - Users who have “Backlog” maintenance tasks entered for an asset are now able to make edits to the details entered for the “Backlog” task. By clicking the “pencil” icon, an “Edit Backlog Item” modal opens where the user can make updates to the information currently stored for the “Backlog” maintenance task.
- “Asset Health Snapshot” section added to several My.Cat.Com emails
  - An “Asset Health Snapshot” section has been added to provide more data to the dealership which aids in understanding what may be going on with the asset from the last 30 days.  
The following dealer emails have been enhanced:
    1. “Schedule General Service”
    2. “Schedule SOS Service”
    3. “Schedule Maintenance Service”
    4. “Schedule Fault Code Service”
    5. “Schedule Inspection Service”
- Maintenance task “type” icons added to “Maintenance” screens
  - New icons have been added to several “Maintenance” screens, to visually provide an indicator to users as to the “type” of maintenance task that the entry is – they are the following:
    - “Service Level” = a “star” icon
    - “Independent Interval” = a “circle” icon
    - “Backlog” = a “triangle” icon
    - “Major Component” = a “diamond” icon
 The color of the “type” icon corresponds to the “status” of the maintenance task:
    - Red = “Overdue”
    - Orange = “Upcoming”
    - Green = “Completed”

## FIXES

Remedies applied to known to product issues or software bugs.

March 2022:

- **Maintenance – Update Tool-tip Text for “Reset to Factory Settings” when not available**
  - When the “Edit Maintenance Settings” modal shows that the user can “Reset Tracking” for the asset, but they cannot “Reset to Factory Settings” – the tool-tip that displays for

the “Reset to Factory Settings” link reads: “Reset to Factory Settings is not available for this asset.”

### Validate User Option – No Existing DCN’s

- When a customer user who is already UCID Validated requests a new Dealer association in My.Cat.com and that dealership does not have any existing DCNs associated to that customer users UCID organization, there will still be a “Validate User” option in the Actions drop down. However, when the "Validate User" option is selected a new popup "No DCNs Exist" modal will display with this information:

**Sorry, since your dealership doesn’t have any existing Dealer Customer Numbers (DCNs) with this company organization, you are not able to setup the user within [My.Cat.com](https://my.cat.com). Please investigate this customer user account or setup any new DCNs if appropriate in the CAT Customer Admin Tool here: [mycustomer.cat.com](https://mycustomer.cat.com).**

### January 2022:

- **Batch Notification Notifications Not Sending to Multiple Email Addresses**
  - A dealer user reported they are not getting the Asset ID update email notifications.
  - The users email address is listed in the correct place in MCC EQUIPMENT NOTIFICATION > Change Asset ID.
  - The Dealer has all of their BATCH NOTIFICATION types checked to receive a daily email.
  - The daily email is being sent but only to the first email address listed under EQUIPMENT NOTIFICATION > Change Asset ID or possibly the "General Email Address for the Dealership".
  - MCC is not sending the batch email to every email address signed up for EQUIPMENT NOTIFICATION > Change Asset ID and likely should if that is the business rule.
  - **Expected Results:** Emails are sent to the appropriate email addresses based on how the dealership has things configured
  - The "Recipient" field is updated to point to the correct data/email addresses.
- **Null Pointer Exception for Tasks Linked to Un-validated Assets**
  - It was reported that when a user creates a task and links it to an un-validated asset, the email generated for that task creation shows an empty "Asset Information" Section.
  - Along with this empty asset information section, the user is unable to share a task with anyone.
  - After the fix, there are no errors. The email contains “Asset Information” & the “Share Task” functionality works successfully.
- **Duplicate “Telematics Device” field displayed in “Subscription” tool-tip**
  - It was found that MCC was duplicating the “Telematics Device” field (in the tool-tip) for assets on the “Fleet List” and “Asset Details” pages.
  - The duplicate “Telematics Device” field happened when the device is a daily upgradable telematics device.
  - Now, the “Telematics Device” field only appears once in the “Subscription” tool-tip for a single telematics device.
- **“Global Search” Invalid Serial Number due to trailing space**
  - Dealer had reported not seeing any asset details after selecting an asset from the global search results (MCC allowed a space in the global search).



- MCC now removes any trailing or leading spaces after the user clicks "Search".
- **My.Cat.Com Emails – "Contact Information" Duplicated in "Schedule Inspection Service" and "Schedule General Service" Emails**
  - Users found that the "Contact Information" section was listed twice in the "Schedule Inspection Service" and "Schedule General Service" emails. Instead of "Inspection information", we were seeing contact information.
  - After the fix, the "Schedule Inspection Service" email only displays the "CONTACT INFORMATION" section once, and displays the "INSPECTION INFORMATION".
  - In addition, the "Schedule General Service" email now only displays the "CONTACT INFORMATION" section once.

#### October 2021:

- **Maintenance – Re-Implement a Maximum Number of "Steps" and "Parts"**
  - The initial maximum number for both "Steps" and "Parts" is set at 100.
- **Fixed the Fault Code Links to SIS2.0 from My.Cat.Com fault code pages**
  - Incorrect CID and SPN FMI mapping has been fixed to yield proper search results in SIS2.0
  - EID codes were not affected

#### August 2021:

- **Incorrect Model Number in MCC**
  - The Cat Model number for some assets in My.Cat.Com was showing one way, but elsewhere the safe-source model number was not being evaluated correctly.

#### July 2021:

- **Maintenance – Remove Limit on Number of Interval Steps Allowed**
  - A user can now associate as many "steps" to a Maintenance interval as they desire. There should no longer be a limit – so the "Add Step" button should never be disabled.
- **Remove Customer Name & UCID from Non-Customer Specific PDF & Excel Downloads**
  - The PDF and Excel downloads that are not customer specific (ie DEALERSHIP TASKS, MANAGE CUSTOMERS, REGISTRATION REPORT, etc) erroneously contain the name of the selected customer
  - **Expected Results:** Don't display a customer name and UCID

#### June 2021:

- **Remove "Mongolian" from the list of supported languages in MCC**



- Today, when a customer has selected "Mongolian" as their language in settings - the My.Cat.com still displays in English.
  - For "Mongolian", the content on My.Cat.com is not translated into Mongolian, it just passes the language code through to SOS.
  - "Mongolian" should not appear as a language option in drop down lists anywhere in MCC.
- **Dealer initiated Invite & Add user email - Dealership name & Email only**
    - **Flow #1: When a Dealer Admin invites:**

The text of the "Register for My.Cat.com" email has been updated so that the current text that provides the Dealer Admin user's name and their email address is changed to only display the "Dealership Name" and the "General Email Address for the Dealership".

The "General Email Address for the Dealership" is pulled from the "Dealership Configuration" page.

The text in the email displays as shown below:

**"Contact <Dealership Name> with any questions at <General Email Address for dealership>".**
    - **Flow #2: When a Dealer adds an existing (pre-validated) user:**

The text in the "Welcome" email has been updated to no longer display the name of the Dealer Admin user the granted access to My.Cat.com.

The following text has been replaced in the email:

**"You have been granted access to My.Cat.com by <Dealer Admin>"**

With this new text:

**"You have been granted access to My.Cat.com by <Dealership Name>".**

The existing functionality has been left alone for Customer Admins. (ie. still displays the name for Customer Admin who added the user in the "Welcome" email)
- **Restrict Email Domains for Enterprise Employee Users**
    - Email domains that are entered in the MCC registration/onboarding flow (specifically "Step 1") have been restricted to not allow the following domains:
      1. cat.com
      2. perkins.com
      3. solarturbines.com
      4. progressrail.com
      5. mwm.net
      6. fgwilson.com
      7. kempervalue.com



## 8. anchorcoupling.com

### May 2021:

#### SMU Last Update Field not Populated for SMU Miles / Kilometers

- The last update field is populated the same as the hours when SMU type is Miles / Kilometers

#### Update/Remove SIS links in My.Cat.Com

- The SIS Web (Legacy) Quick Link has been removed from the "Overview" page (keep the SIS 2.0 Quicklink).
- The "NEW" text from the "SIS 2.0" Quick Link text on the "Overview" page has been removed.
- The "SIS Legacy" Serial number specific Link/card has been removed from the "Toolkit" page.
- The "(NEW)" text from the existing SIS 2.0 Toolkit card on the "Toolkit" page has been removed.

#### Timestamp Inconsistency in Downloaded XLS files (UTC)

- **Issue:** When downloading the Fault code data in XLS format, the downloaded file shows different time than the time displayed in My.Cat.com. My.Cat.com shows UTC time and downloaded file shows CDT time.
- **Fix:** Downloaded XLS file should show time in UTC.
  - The service used for exports has been updated so that XLS files show the date/timestamp for in UTC instead of CDT.
  - The column header in the XLS download for "Date" has been updated to display as "Date (UTC)".

### April 2021:

- **Remove Dealer/Admin name from "Account Validated" and "Account Validation Cancelled" Emails**

- The "Account Validated" email has been updated to no longer display the name of the Dealer/Admin user who completed the validation.
- The "Account Validated" email now reads as follows:

<Dealership name> has completed your My.Cat.Com set up. Your user account has been successfully tied to your business account and you are ready to view your equipment data!

Your username is <username>

If you have any questions, please contact our [support team](#). Thank you for registering with [My.Cat.Com](#).

Sincerely,

The Caterpillar My.Cat.Com Team

- The "Account Validation Cancelled" email has been updated to no longer display the name of the Dealer/Admin who has cancelled the validation request.
- The "Account Validation Cancelled" email now reads as follows:

<Dealership name> has cancelled your validation request for My.Cat.Com. The reason given for the cancellation is listed below:

<"Reason for Cancellation" text saved in "Cancellation Validation Request" modal>

If you have any questions or believe that you have received this email in error, please contact our [support team](#).

Sincerely,

The Caterpillar My.Cat.Com Team

- **Update "End User Agreement" Registration Page with new Text and Hyperlink**
  - first checkbox text under the "End User Agreement" has been updated to read: "I have read and agree to the My.Cat.Com End User Agreement."
  - The second checkbox text under the "End User Agreement" has been updated to read: "I have read and acknowledge the [My.Cat.Com Privacy Notice](#) and [Data Governance Statement](#)."
  - The "My.Cat.Com Privacy Notice" text is a hyperlink to the Privacy Notice. This is the same as the "Privacy" link at the bottom of the page.
  - The hyperlink for the "Data Governance Statement" text is: <https://www.caterpillar.com/dataprivacy>

#### March 2021:

- **"Manage Customer Users" – Display the Name of Original Invite Sender (from MCC Data table)**
  - The displayed name of the "Administrator" on the "Invitations" tab of the "Manage Customer Users" tab
  - When there is no name in the database record (if the original account is no longer existing), then the screen displays "Unknown".
- **Mobile Date Range Selector updates**
  - The framework code for "Date Range" has been updated so that the range that can be selected is the same in mobile as it is in the desktop (non-mobile) view.
  - The selected "Date Range" is retained when a user returns to the date picker to select a new date range.

#### February 2021:

- **SOS Sample Missing Status Error**
  - End users get an error which prevents them from seeing any of their SOS samples.
- **Add Validation Message for "Service Meter" for Non-Manual Maintenance Assets**
  - The same field validation messaging has added for non-PMM Manual Maintenance assets that is currently displayed for PMM Manual Maintenance assets: **"Enter a value less than or equal to 999999999"**

#### January 2021:

- **"Utilization" – if "Idle Hours %" or "Working Hours %" is over 100%, then bad data flagged**
  - As any user role on the Asset Details: Utilization screens - for both Hours & Fuel tabs:



If the idle hours % value for a date is greater than 100% then:  
 The text for the row is in red font.  
 The alert icon is displayed after the date, with the suspected bad data tool tip text.  
 The data points for the date are not displayed in the chart.

If the working hours % value for a date is greater than 100% then:  
 The text for the row is in red font.  
 The alert icon is displayed after the date, with the suspected bad data tool tip text.  
 The data points for the date are not displayed in the chart.

M5S00347 M5S00347 - CAT 972M

Assign Inspection Request Service Buy Parts

	Service Meter	Working Hours	Idle Hours	Total Hours	Working %	Idle %
Apr 16, 2020	10,316 Hours	39.5	6.8	46.3	85	15
Aug 28, 2020	11,645 Hours	32.9	0	32.9	100	0
Jul 22, 2020	11,216 Hours	32.8	0	32.8	100	0

- **Ownership Status is now consistent between “Details” and “List” pages**

- If an asset is found in both CDDW and CCDS then the Ownership value is determined by the ownership status value the dealer sent to CDDW as long as the DCN matches in CCDS and CDDW.
- If an asset is found in CDDW but not in CCDS then the Ownership value is determined by the ownership status value the dealer sent to CDDW as long as the DCN is correct.
  1. If the asset is un-validated, then use whatever the customer specified.
  2. Else if the asset is in CDDW:
    - a. If one or more are Owned, then Owned.
    - b. Else if one or more are Leased, then Leased.
    - c. Else if one or more are Rented, then Rented.
    - d. Else Unknown.
  3. Else Unknown.

- **Fixed the validation error message for “User Selector” in the “Add User” modal**

- The error message for that displays for the “User Selector” field in the “Add User” modal only display if the entered/selected user is already a Dealership User.
- The error message only includes the user name for the user that is already a Dealership User – not all of the users that have been added.

- **Telematics Invoices - Don't calculate outstanding balance value**

- As any user with access to the **Operations: Telematics Invoices** screen:

For any invoice row with 1 or more credit memo's the outstanding balance value displayed in the MCC UI matches the outstanding balance value displayed in the associated invoice PDF.



- **Removed the multiple language support for the “Learn More” link**

- As any user role, on the:

**Overview screen Subscription Summary box:**

If the user's selected language is English then this link is displayed: "Learn more about telematics subscriptions".

Else, for all other selected languages the link is Not displayed.

Clicking the link opens a new browser tab to this URL:

[https://www.cat.com/en\\_US/support/operations/technology-services-for-construction/technology-for-construction/link-for-construction.html](https://www.cat.com/en_US/support/operations/technology-services-for-construction/technology-for-construction/link-for-construction.html)

**Request Subscription Upgrade modal:**

If the user's selected language is English then this text & link is displayed: "Learn more about [telematics subscription options](#)."

Else, for all other selected languages the text & link is Not displayed.

Clicking the link opens a new browser tab to this URL:

[https://www.cat.com/en\\_US/support/operations/technology-services-for-construction/technology-for-construction/link-for-construction.html](https://www.cat.com/en_US/support/operations/technology-services-for-construction/technology-for-construction/link-for-construction.html)

**November 2020:**

- **UI: Validate Cat Serial Number for QR Code**
  - For an asset with Make: CAT - the entered serial number value must be a valid Caterpillar serial number.
- **Telematics Invoices: change default date range to 6 months**
  - As any user granted access to the Operations: Telematics Invoices screen.
  - Upon first load of the screen the default date range is 6 months.

**October 2020:**

**“Invite New Users” - Customer Admin Users Verify if UCID Still Exists**

- If an email address has been entered into the “Invite New User” modal, and it has an invitation already associated to it – then check to see if the UCID that invitation was tied to still exists.
- If the UCID still exists, then the Customer Admin user is not able to submit another invitation to the same email address – since one is already pending.
- If the UCID has been deleted, then the invitation associated to the email address is cancelled – and the Customer Admin user is able to submit a new invitation for that same email address.

**“Registration Report” Download – Include the “All” Row in Download File**

- The XLS and PDF files for the download of the “Registration Report” (Dealer Report) includes all of the same data that is shown on the screen.
- If the “All” row is shown on the screen, then it is included in both the XLS and PDF downloaded files.

**September 2020:**

- **My.Cat.Com Emails – Add “Customer Contact” Info to “Request Service” Emails**



- Each of the “Schedule Service” emails that are sent to dealers include a “Contact Information” section with information related to how to contact the customer who has scheduled that particular service. The emails that have the customer “Contact Information” included are:
  1. “Schedule Fault Code Service”
  2. “Schedule General Service”
  3. “Schedule GPS Rollover Service”
  4. “Schedule Inspection Service”
  5. “Schedule Maintenance Service”
  6. “Schedule SOS Service”
  7. “Call Off Rental”
  8. “Create Telematics Subscription”
  9. “Upgrade Telematics Subscription”
  10. “Quote Customer Value Agreement”
  11. “Quote Extended Protection Plan”
  
- **Password Change from “Account Settings” was not working as expected**
  - Previously, no confirmation of a successful password change was displayed and the password was not changed to the new password.
  - Now, the user is shown a success message when the password has been successfully updated – and the password is updated to the new password.
- **“Date Range” Selector (iPad) – Blank (Black) Tool-Tip Displays Briefly on Hover**
  - Previously, when a user viewed a My.Cat.com page with a “Date Range” selector on an iPad – hovering over the “Date Range” text resulted in a blank (black) tool-tip displaying briefly on the screen.
  - The reason for this “Date Range” tool-tip displaying on the iPad has been determined, and the solution has been implemented for all pages that have a “Date Range” selector.
- **“Manage Customers” Downloads – Do Not Include the “View Fleet” Text in Downloads**
  - The “View Fleet” text has been removed from the download of information from the “Administration: Manage Customers” page.
  - The XLS file’s “NAME” column displays only the customer name, without the “View Fleet” text.
  - The PDF file’s “NAME” column displays only the customer name, without the “View Fleet” text.
  - The “Administration: Manage Customers” page continues to display the “View Fleet” link text. Only the download files remove the “View Fleet” text.
- **Maintenance – “Next Service” Does Not Display if Not Within the Default Timeframe**
  - On the “Assets: List” page, the “Next Service” for each asset in the fleet list is displayed within the “1-week back, 1-year forward” timeframe.
  - On the “Asset Details” page, the dashboard displays the “Next Service” for the asset within the “1-week back, 1-year forward” timeframe.
  - The “Due Date” for the first maintenance service shown in the table for an asset on the “Asset Details: Maintenance” page already shows the date the service is due - but it may not be the same as what is shown on the “Assets: List” screen & “Asset Details: Dashboard”, as the table on the “Asset Details” screen has it’s own “Date Range” selector.
- **Manage Dealer Users - dealer code mapping issue**
  - Previously, there were Dealer users added to a dealer code that had been mapped to a different dealer. They would get an error upon logon, and were unable to use My.Cat.com.
  - The “Administration: Manage Dealer Users” screen has been updated so that Caterpillar Admins and Dealer Admins cannot add users to a dealer code that has been mapped to a different dealer.



- **Sign Up Password Validation Error**
  - Previously, some Dealer users were unable to sign up their customers with My.Cat.com – and they were getting a generic "contact support" error.
  - The password the user was using appeared to be meeting the minimum password requirements per the UI (specifically the Special Character item), but it really wasn't because there wasn't a special character being used in the password. The My.Cat.com was treating "p" as a special character.
  - There is now a more specific message displayed to the user when the password does not meet the minimum requirements.

#### August 2020:

- **Relaxation of duplicate interval names for Independent Intervals and Major Component Intervals**
  - My.Cat.Com has been updated to allow a user to use a duplicate name for "Independent Interval" and "Major Component" intervals that are designated as "Occurs only once" ("one time only"). If a duplicate name is used, then each of the occurrences needs to have a different "First Occurrence" associated to it.
  - With the change to allow a duplicate name, the validation for the name in the "Add" modal happens upon the user clicking the "Save Changes" button – so the system is able to determine if the "Occurs only once" checkbox has been selected.
  - Duplicate interval names are allowed for: (1.) "Independent Intervals" marked as "Occurs only once", (2.) "Major Component" intervals marked as "Occurs only once", and (3.) "Backlog" intervals.
  - When a user is attempting to "Copy" an interval from any of the three scenarios listed above, then they no longer are shown a "Resolve Conflict" button – as there is no longer be a conflict with the duplicate name (it is now allowed).
  - The "First Occurrence" field takes into account both the numeric value and the unit of measure when determining if there is a duplication.

#### July 2020:

- **Display the "Reset to Factory Settings" link as inactive if reset is not available**
  - Within the "Edit Maintenance Settings" modal, the business logic has been updated to show the "Reset to Factory Settings" link as grayed out (not selectable) when the current settings match Cat's schedule.
  - When the user hovers over the icon while the "Reset to Factory Settings" link is inactive, the tool-tip reads: "Reset is not eligible due to the current schedule matching Cat's schedule."
  - The inactive "Reset to Factory Settings" link is displayed if the asset is "multi-model" (it has multiple builder files). The tool-tip in this scenario reads: "Reset is not eligible due to multiple models of this asset."
  - The inactive "Reset to Factory Settings" link is displayed if the asset data does not come from SMI. The tool-tip in this scenario reads: "Reset is not available for this asset."
- **Update MCC "Invite" emails to not link the "My.Cat.Com" text**
  - For the "Register for My.Cat.Com" and "Sign In to My.Cat.Com" emails we don't want the "My.Cat.Com" text to be turned into a link automatically by Outlook.
  - The resource bundle has been modified such that the "My.Cat.Com" text is not turned into a link within these two emails, nor in the footer of any of the MCC emails.

#### June 2020:

- **Standardized display of text links within My.Cat.Com**
  - Text links throughout My.Cat.Com now display in a consistent manner. If text is a link, it will display as blue text. When the user places their cursor over the blue text, the link will also be underlined. This update should make it easier for users to identify text as a link.
- **Default of the user's email address as their CWS ID when signing up for My.Cat.Com**

- Within the “Sign Up” screen for My.Cat.Com, the email address entered will be defaulted as the “Username” as well. The “Username” can still be changed if desired – but once an email address is entered in the “Email” field, the “Username” field will automatically be populated with the same email address.
- Sync of Dealer Management Tool (DMT) deletions with new users in Dealer Registration Report
  - A new My.Cat.Com batch job will run daily to sync the “Registration Report” to remove any users that have been deleted by dealer users in the Dealer Management Tool (DMT). This will keep users from being reported as “waiting for dealer validation” on the “Registration Report” – when the dealer will not be validating. The “Registration Report” will be updated to “Cancelled” – and the “Unvalidated Days” column count will display a dash “-”.

## OTHER/OPERATIONS

Changes that impact availability, installation, or support for the product.

### March 2022:

- **Dealer Admin (inviter) cc'd on “Invitation Accepted” email**
  - When a MCC “Invite” is initiated by a Dealer Admin (not a Customer Admin), the Dealer Admin is cc'd on the “Invitation Accepted” email.
  - The Customer Admin is not cc'd on the “Invitation Accepted” email, as it has information/instructions that this person does not have access or capabilities to manage.
- **No Longer Display “Advice Center” on “Asset Details” page**
  - On the “Asset Details” page, the “Advice Center” section – and all sub-sections - no longer display.
- **Suppress “Fault Code” Data for Assets with Cat Basic subscription per Commercial Product Link Subscription definition**
  - Assets with a VisionLink Cat Basic subscription are not defined to see any of the Fault Code data for Connected assets in MCC as per the Product Link Parts and Service Guide.
  - The display of Fault Code data for Connected assets at the Fleet level, and Asset Detail level has been suppressed– if the asset’s subscription is Cat Basic.
  - If the asset has a Cat Basic subscription, there is a blue-bar message that displays on the “Asset Details” page telling the user that Fault Code data is not supported for the Cat Basic subscription. They are directed to consult with their dealer if they would like a subscription upgrade.

### February 2022:

- **Fuel Guarantee Enrollment for ADSN-N - Validated user & equipment**
  - Newly enrolled ADSN-N assets are required to have the associated equipment UCID match the associated UCID of the person submitting the Fuel Guarantee enrollment request.
  - The enrollment in the Fuel Guarantee program for ADSN-N assets is only granted for Validated users & Validated equipment.
  - If the Equipment UCID, and the user’s/submitter’s UCID do not match – then MCC prevents enrollment in the Fuel Guarantee program.



- MCC points the user/submitter to contact their Local Dealership for any questions or concerns.
- The message reads: **"Sorry, please reach out to Dealer <X> to ensure asset ownership and customer user accounts match."**
- The case check on S/N for enrollment has been removed.
- **"Validate Customer User" email updated with "Customer Admin Tool" text**
  - The text within the "Validate Customer User" email has been updated to reflect the retirement of the UCID tool, and its replacement with the "Customer Admin Tool" (<https://mycustomer.cat.com/>).
  - The 3<sup>rd</sup> point in the "ACTION REQUIRED" list now reads:

**If a new UCID Customer Organization or DCN needs to be created, manage the company hierarchy in the new Customer Admin Tool ([https://mycustomer.cat.com](https://mycustomer.cat.com/)), otherwise you can validate the user to their UCID Organization using the My.Cat.com Registration Report or Dealership Task report.**

- **Explanatory Note added to "Maintenance Notifications" Modal**
  - Within the "Maintenance Notifications" modal, under the "Email notifications will be sent based on the settings below" text, the following text has been added:

**Note: Notifications for assets subscribed to a VisionLink level must be configured in VisionLink.**

#### January 2022:

- **MCC Registration – Move "Dealer Selection" Loading Icons & Wait to Load Page Until Dealers Are Retrieved**
  - The "Loading" icons (yellow bubbles) have been moved from the top of the page, to display beneath the explanatory text on the "Dealer Selection" page.
  - The rest of the "Dealer Selection" page remains blank until the loading has been completed.
  - Once the loading has completed, the user is shown a page with a "Search" field, and a map with the dealer locations marked.
  - After a location/name is entered in the "Search" field, the list of dealers matching the search criteria display in a list – and the map adjusts to focus on the dealers in the returned list.

#### November 2021:

- **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, kempervalue.com, anchorcoupling.com**

- The blocked/restricted domains are:
  - cat.com
  - perkins.com
  - solarturbines.com
  - progressrail.com



- mwm.net
- fgwilson.com
- kempervalue.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.

## July 2021:

- **Update "Machine Component Serviced" List in "Record Service" Modal**
  - The "Machine Component Serviced" drop-down list has been updated in the following manner:

**Removed from the list:**

AUGER DRIVE  
 AUGER/SCREW CONVEYOR  
 BEACON/STROBE LIGHT  
 BOGIE  
 ELEVATION/SUSPENSION LEG  
 FEEDER CONTROL  
 MANUAL SHIFT/DDT  
 MATERIAL HOPPER  
 SCRD BRNR/WSHDWN FUEL SYS  
 SCREED  
 SCREED BURNER  
 SCREED EXTENSION  
 SEAT ASSEMBLY  
 WATER SPRAY SYSTEM

**Added to the list:**

ENGINE  
 TRANSMISSION  
 HYDRAULIC SYSTEM  
 HYDRAULIC CYLINDERS  
 OPERATOR STATION  
 UNDERCARRIAGE  
 WHEEL & TIRE  
 COUPLERS, HOSES & VALVES  
 GROUND ENGAGING TL (GET)

- **Update "Type of Service Performed" job type field in "Record Service" Modal**



- The "Job Type" list has been updated to include the following entries:
  - Supply Part
  - Remove
  - Disassemble
  - Clean
  - Paint
  - Lubricate
  - Replace
  - Rotate
  - Overhaul
  - Adjust
  - Take & Analyst S-O-S FROM

#### February 2021:

- **"Asset Details: Health & Maintenance" – Remove Counts from Left-Nav Sub-Menu**
  - The counts that are displayed for each of the sub-sections under "Health & Maintenance" in the left-nav of the "Asset Details" page have been removed.

#### September 2020:

- **Operations: Service History – Add Bullet-Points to Display when Multiple "Description" Items Listed**
  - When the "Description" field is included on the page, the separate items are displayed as a bulleted list.
- **Remove the Cat MineStar Health Equipment Insights row from Subscription Summary**
  - On the "Overview" screen, in the "Subscription Summary" box - the "Cat MineStar Health Equipment Insights" row is no longer displayed.
  - "Cat MineStar Health Equipment Insights" subscriptions are included in the "Not Subscribed" count.
  - The "Connection" tool-tips for assets with "Cat MineStar Health Equipment Insights" subscriptions still display that subscription name.