

Quick Hints on using Cat S.O.SSM Services Web Functionality for Customer Portal



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Set Date Range Filter – Samples Page

1. Select “Filter Details”
2. Click Add Filter Condition
3. Choose Date (Sampled, Process, etc...)
4. Choose “Between”
5. Input Date Range
6. Click Save Filter
7. Click Apply
8. To select a new date range – click Edit

The screenshot illustrates the steps to set a date range filter on the CAT Samples page. The navigation bar at the top includes 'CAT', 'DASHBOARD', 'FLEET', 'SAMPLES', 'SUBMIT', 'REPORTS', 'PREFERENCES', and 'ADMIN'. A dropdown menu shows 'Filter Details' (1) and 'Add Filter Condition' (2). Below are filters for 'HEALTH', 'HEALTH HISTORY', 'STATUS', 'ASSET ID', 'ASSET SERIAL NO.', 'JOBSITE', and 'LAB NO.'. An 'ADD FILTER' dialog box shows 'Sampled Date' (3) selected, 'Between' (4) as the operator, and a date range input field (5). The main page shows a filter card for 'Sample' with 'Sampled date between Jan 1, 2014 and Aug 31, 2016'. Below the card are 'Add Filter Condition' (6), 'Save Filter' (6), 'Apply' (7), and 'Reset' buttons. An 'EDIT' button (8) is circled in red with an arrow pointing to it.

Equipment Comparison

1. Fleet page
2. Components tab
3. User selects equipment & components
4. Click “Compare Graph”

1

Assets Components 2

-- Select filter -- Filter Details

+ Add Filter Condition

SUBMIT COMPARE GRAPH 4

ASSET ID	COMPONENT	SERIAL NO.	MANUFACTURER	MODEL	LAST SAMPLE DATE	DUE / OVERDUE	ASSET SERIAL NO.	JOBSITE
100-000063	FINAL DRIVE REA...		CATERPILLAR	773B	08/25/2014	03/21/2015	63W02316_DSF1	002801 - Tuscaloos...
100-000060	FINAL DRIVE REA...		CATERPILLAR	773B	08/25/2014	03/21/2015	63W02422_DSF1	002801 - Tuscaloos...
00-000064	FINAL DRIVE REA...		CATERPILLAR	773B	08/25/2014	03/21/2015	63W02218_DSF1	002801 - Tuscaloos...
00-000030	FINAL DRIVE REA...		CATERPILLAR	980C	08/25/2014	11/02/2014	63X07262_DSF1	002801 - Tuscaloos...
00-000061	FINAL DRIVE REA...		CATERPILLAR	773B	08/25/2014	10/27/2014	63W02812_DSF1	002801 - Tuscaloos...
100-000062	FINAL DRIVE REA...		CATERPILLAR	773B	08/25/2014	09/27/2014	63W02811_DSF1	002801 - Tuscaloos...

3

Add New Equipment to Create Label

1. Fleet page
2. Assets tab
3. Click "Add"
4. Fill in Info
5. Click "Save Asset"
6. Submit page
7. Search or Add Component field

The image illustrates the process of adding new equipment to create a label through the CAT software interface. It consists of three sequential screenshots:

- Screenshot 1:** Shows the main navigation bar with the 'FLEET' menu item circled in red. Below it, the 'Assets' tab is selected and circled in red. The 'ADD' button is also circled in red.
- Screenshot 2:** Shows the 'ADD ASSET' form. The 'SAVE ASSET' button at the bottom left is circled in red. The form contains fields for Asset ID, Manufacturer, Dealer, Jobsite, Meter Type, Language, Asset Serial Number, Model, DCN Customer, Region, Meter Units, and Equip Note.
- Screenshot 3:** Shows the 'SUBMIT' button circled in red in the navigation bar. Below it, the 'Search or Add Component' field is circled in red.

Red arrows indicate the flow from one step to the next.

Fluid or Equipment Maintenance

1. Fleet page
2. Asset or Component tab
3. Click on blue link
4. Click “Add Fluid Maintenance”
5. Select Event
6. Enter information
7. Click “Add” when finished.

The screenshots illustrate the following steps:

- Step 1:** The user is on the 'FLEET' page of the CAT system.
- Step 2:** The user clicks on the 'Components' tab.
- Step 3:** The user clicks on a blue link for a specific component, 'FINAL DRIVE REAR'.
- Step 4:** The user clicks on 'ADD FLUID MAINTENANCE' in the 'SUBMIT SAMPLES' menu.
- Step 5:** In the 'ADD FLUID MAINTENANCE' modal, the user selects 'Fluid Change' as the event.
- Step 6:** The user enters the following information:
 - Sampled Date: 08/31/2016
 - Equipment Meter Reading: [blank]
 - Previous Meter Reading: 53114
 - Meter On Fluid: 53114
 - Fluid Brand: Mobil Lube
 - Fluid Type: HD
 - Fluid Weight: 80W-90
 - Notes: [blank]
- Step 7:** The user clicks the 'ADD' button to save the record.

Take Action on a Sample

1. Samples Page
2. Select sample
3. Sample Activities field - Select Record Action
4. Click Apply
5. Select/Check Actions taken
6. Enter Info
7. Click Submit

The screenshot displays the CAT software interface for managing samples. The top navigation bar includes 'DASHBOARD', 'FLEET', 'SAMPLES', 'SUBMIT', 'REPORTS', 'PREFERENCES', and 'ADMIN'. The 'SAMPLES' tab is active. Below the navigation bar, there are filters for 'Sample Date Range' and 'Filter Details'. A table of samples is shown, with the 'Lab No.' field for 'DSF1-44330-0023' highlighted. The 'SAMPLE ACTIVITIES' dropdown menu is open, showing 'Record Action' selected. The 'RECORD ACTION' dialog box is displayed, with 'Was action taken on this sample?' set to 'Yes', 'Action(s) taken' set to 'Check All', and 'Date Performed' set to 'MM/DD/YYYY'. The 'SUBMIT' button is highlighted in the dialog box.