

Frequently Asked Questions about S•O•SSM functionality in Customer Portal

1. How do I prepare Users for the SOS Services Web move to Customer Portal?

A ZIFT awareness campaign has been published and is available for your ZIFT Admin <https://cat.ziftsolutions.com>

You can also reference the hyperlinks for the emails

[Email 1 - Introducing a new way to view your S•O•S Services Results](#)

[Email 2 - S•O•S Services Web in CAT® Customer Portal](#)

[Email 3 - S•O•S Services Web in CAT® Customer Portal - New Features](#)

[Email 4 - S•O•S Services Web in CAT® Customer Portal - Graphing and Activities](#)

[Email 5 - Retirement of all previous versions of S•O•S Services Web](#)

There is no cost associated with the campaign, and SOS Admins have been provided a list of their users that have logged into SOS SW applications in 2016.

2. What training materials are available?

On <https://dealer.cat.com/en/ps/equipment-management/sos.html> under the Software Tools tab is a section named **S•O•SSM functionality in Customer Portal**.

This contains documentation regarding the process to configure users in Customer Portal (Portal Admin guide), how to configure new SOS Services Web users (Process for user setup in Customer Portal), Quick Hints Guide, FAQs, and 5 User-guide training documents.

3. What marketing materials are available?

As SOS functionality will be fully integrated into Customer Portal all marketing materials will be available through the Customer Portal site <https://dealer.cat.com/portal>

4. What is the process for onboarding new users?

Please refer to the 'Process for user setup in Customer Portal' on

<https://dealer.cat.com/en/ps/equipment-management/sos.html> under the Software Tools tab

5. What will be the landing page for Customers? For Dealers?

This will depend on whether the Dealership has deployed the Fleet and Rental portions of Customer Portal. If either of these modules have been deployed, ALL users will land on the Customer Portal homepage

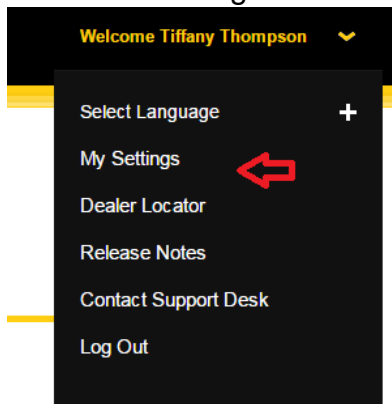
The screenshot displays the CAT Customer Portal interface. At the top, a black navigation bar contains the CAT logo and menu items: HOME, ASSETS, OPERATIONS, MY ACTIVITY, and ADMINISTRATION. On the right side of this bar, it says "Welcome Tiffany Thompson" with a right-pointing arrow. Below the navigation bar is a yellow horizontal separator. The main content area is white and features a "HOME" heading. Underneath is a "Customer Selector:" label and a text input field with the placeholder "Enter a customer name or number". The interface is divided into two columns. The left column has a "TASKS" section with a yellow underline, showing "0 TOTAL" in large bold text and "0 TASKS ASSIGNED TO YOU" below it. At the bottom of this column are "DUE DATE" and "TASKS" dropdown menus. The right column has an "ALERTS" section with a yellow underline and a help icon. Below it is a "CONTACTS" section with a yellow underline and a help icon. Underneath the contacts section is a "FREQUENT CONTACTS" section with a dropdown arrow, showing "No Results Found".

If NEITHER of these modules have been deployed, then all users will be automatically redirected to the SOS portion of Customer Portal upon login

CAT DASHBOARD FLEET SAMPLES SUBMIT REPORTS PREFERENCES ADMIN									
Welcome PPS-00073E1A									
CLOSE SAMPLES		DOWNLOAD RESULTS		-- Select filter --		Filter Details			
HEALTH	HEALTH HISTORY	STATUS	LAB NO.	ASSET SERIAL NO.	COMPONENT	LAB DATE			
--Select Option--		1 Checked				Last 7 Days			
✓	✓ ✓	New	CCFV-46281-0292	XXXXXXXXXX	HYDRAULIC SYSTEM	10/07/2016			
✓	✓ ⚠	New	CCFV-46281-0291	XXXXXXXXXX	FINAL DRIVE LEFT	10/07/2016			
✓	✓ ✓ ✓	New	CCFV-46281-0290	XXXXXXXXXX	ENGINE	10/07/2016			
✓	✓ ✓ ✓	New	CCFV-46281-0289	XXXXXXXXXX	FINAL DRIVE REAR RI...	10/07/2016			

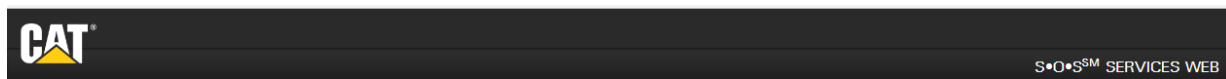
6. Can I change my landing page?

Users can change their landing page in 'My Settings' under the user name in the right corner



7. What happens when I use VisionLink® and I click on the sample details?

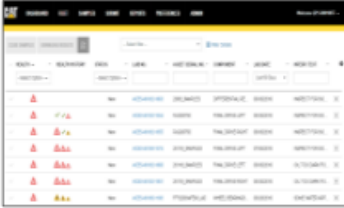
Users will be directed to the SOS Services Web redirect page. Below is the Current View



CWS ID

Below is the New View (as of October 17, 2016)


S•O•SSM Services Web has moved to Customer Portal. All other versions will be retired December 31, 2016. Please use the links below to redirect to the application you want to use.




NEW!! - S•O•SSM Services Web in Customer Portal

You don't need any special software or training to get started.
You are already signed up for Customer Portal.


[Login Now](#)





S•O•SSM ServicesWeb – Version 1
Retires December 31, 2016

[Login Now](#)



S•O•SSM Services Web – Version 2
Retires December 31, 2016

[Login Now](#)

Users will select which application they want to access Customer Portal, SOS SW V1, SOS SW V2. Selecting any of these applications will redirect the user to the selected application's sample details page for the VisionLink® sample. After retirement of the SOS Services Web applications, users will be automatically redirected to the landing page of Customer Portal. See FAQ #5 for additional information

8. *Can I use the same URL I have bookmarked from the Dealer web page?*
All bookmarks that are linked will go to the SOS SW redirect page described in FAQ # 7.
9. *What is the URL that goes directly to Customer Portal?*
Customer users will be able to log on to <https://customerportal.cat.com>
10. *Who do I contact if I can't log on?*
Contact the Caterpillar Customer Portal Support directly
<https://dealer.cat.com/content/dam/dealer/Business-Tools/eBusiness/ebusiness-enterprise-service-center.pdf>
11. *Who do I contact if I can't see samples or equipment?*
Contact the Caterpillar Customer Portal Support directly
<https://dealer.cat.com/content/dam/dealer/Business-Tools/eBusiness/ebusiness-enterprise-service-center.pdf> or in the application

Welcome Tiffany Thompson ▾

- Select Language +
- My Settings
- Dealer Locator
- Release Notes
- Contact Support Desk**
- Log Out

Caterpillar is dedicated to improving the Customer Portal experience. Please report any issues with the interface, bugs or features you would like to see. We value your feedback. You may also contact our Enterprise Service Center any time at +1 309-578-6789 or toll-free in the US and Canada at +1 855-391-1778.

Name*	Role
<input type="text" value="Thompson, Tiffany"/>	<input type="text" value="Employee"/>
Email*	Contact Phone
<input type="text" value="Thompson_Tiffany@cat.com"/>	<input type="text" value="+1 309 675 7798"/>
Method	Preferred Contact Time
<input type="text" value="Select"/>	<input type="text" value="Morning"/>
Request Type*	Time Zone
<input type="text" value="Select"/>	<input type="text" value="(UTC-06:00) Central Time"/>

(Keep in mind that requests that are emailed are responded to within 24 hours and treated as Medium or lower priority. For any high or critical issues, please follow-up email with a phone call to help desk and reference your email)

12. Who do I contact if there is a webpage error?

Contact Caterpillar Customer Portal Support directly

<https://dealer.cat.com/content/dam/dealer/Business-Tools/eBusiness/ebusiness-enterprise-service-center.pdf> or in the application as shown in FAQ #11