VISIONLINK® FLUID ANALYSIS

POWERED BY

S•O•S^{SM} SERVICES

TRAINING WORKBOOK

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FLUID ANALYSIS *POWERED BY S•O•S℠ SERVICES* OVERVIEW

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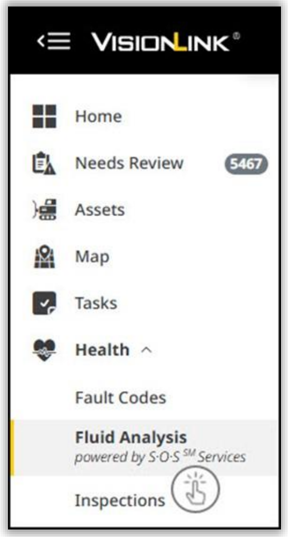
FLUID ANALYSIS *POWERED BY S•O•S℠ SERVICES* OVERVIEW

Here's how to navigate the **Health** > **Fluid Analysis *powered by S•O•S℠ Services*** page, which shows fluid analysis results and the samples' progress in VisionLink®.

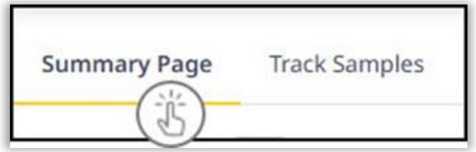
1

Select **Health** > **Fluid Analysis *powered by S•O•S℠ Services***.



2

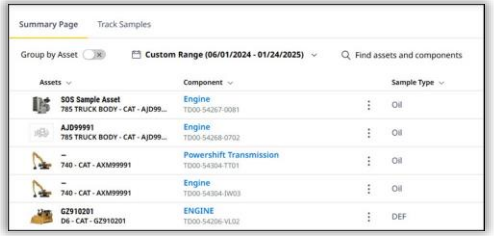
Select the **Summary Page** tab to see fluid analysis results.



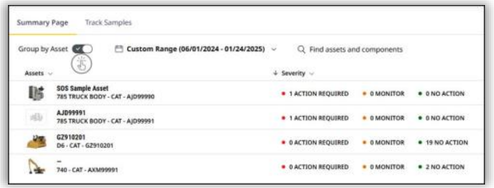
3

View fluid analysis results in two ways:

1. Toggle OFF **Group By Asset**: VisionLink shows each component's fluid analysis result by component (default view).
2. Toggle ON **Group By Asset**: VisionLink consolidates all fluid analysis results for the asset into one line item.



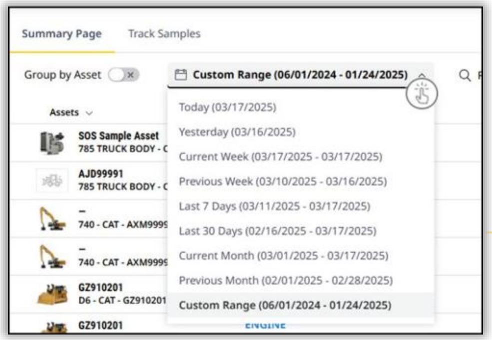
OR



4

The default date range is the last seven days. You can select a date range for up to five years in the past from the drop-down menu. If you change the date range here, it will be retained in the **Track Samples** tab and vice versa.

Note: The date range reflects the date of the sample analysis in the lab.



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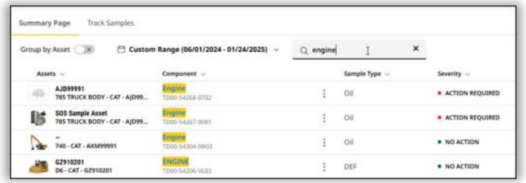
FLUID ANALYSIS *POWERED BY S•O•S SM SERVICES* OVERVIEW (CONT.)

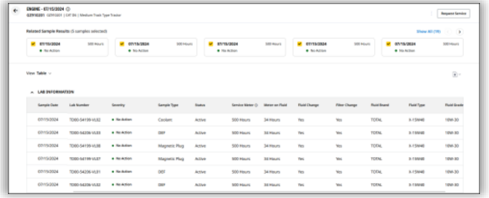
5

Search for fluid analysis results by asset or component name, serial number, or asset ID.



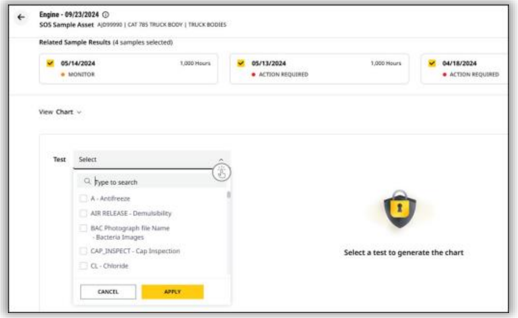
6

Select the **Component** to open a sample results details page. If available, you can add up to 20 previous fluid analysis results in the **Related Sample Results** section to the current results for comparison.



7

If you change the view to **Chart,** you can select up to five tests to compare historical sample test results.



8

To return to the main **Summary Page** tab, select the black arrow. You can register a new sample on either tab.

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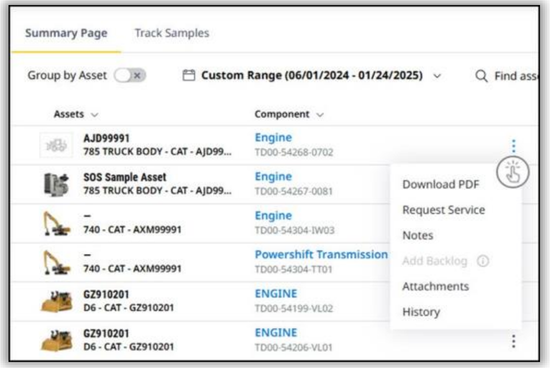
FLUID ANALYSIS *POWERED BY S•O•S*℠ *SERVICES* OVERVIEW (CONT.)

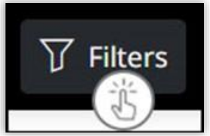
9

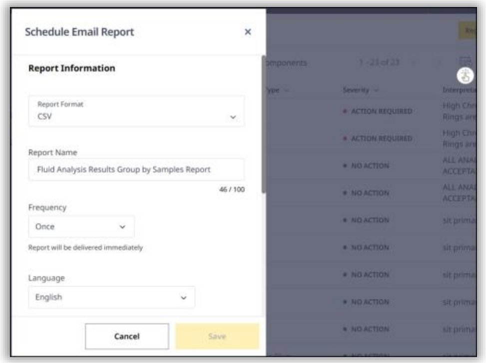
The **Actions** menu provides all the various options you can perform on the fluid analysis results (i.e. downloading a PDF and requesting service from your dealer).



10

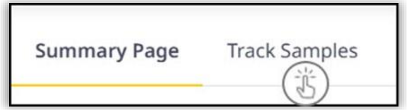
Filters help you create a refined view of your fluid sample results.
You can schedule an email report for fluid analysis results for selected recipients in your choice of formats and delivery frequency using the Schedule Email Report icon.





11

You can download a report in your choice of formats.
You can change your view of the **Sample Page** tab using the Settings icon.
Select the **Track Samples** tab to continue.



12

Use the **Track Samples** tab to view samples registered in VisionLink that are in **Submitted, Received in Lab,** and **In Analysis** states.
You can change your view of the **Track Samples** tab using the Settings icon.

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REGISTER FLUID SAMPLES IN WEB

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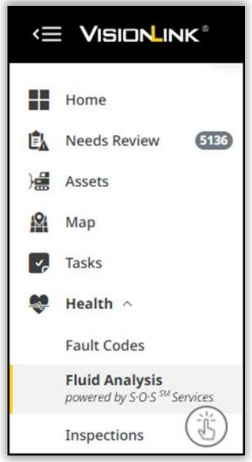
REGISTER FLUID SAMPLES IN WEB

Registering fluid samples in VisionLink® makes it easy for you to set up and reuse frequently sampled component sets for assets, associate your assets' components with dealer-provided sample bottle numbers, and track your samples as they progress through the lab. This process can save time and reduce the risk of submitting unidentifiable samples.

1

Select **Health** > **Fluid Analysis** ***powered by S•O•S SM Services***.

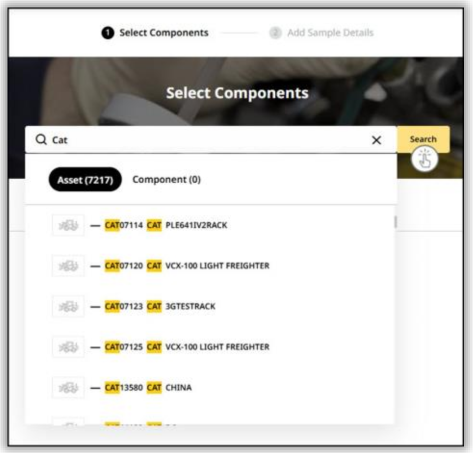


2

Select **Register Sample.**

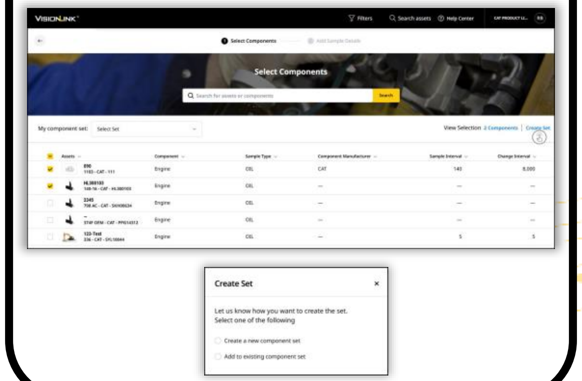
3

Use the smart search functionality in the **Select Components** page to search for your asset or component.



4

Select check boxes for all the components and assets whose samples you want to register (up to 20). Use the **Create Set** functionality to save time when taking samples frequently from these components.



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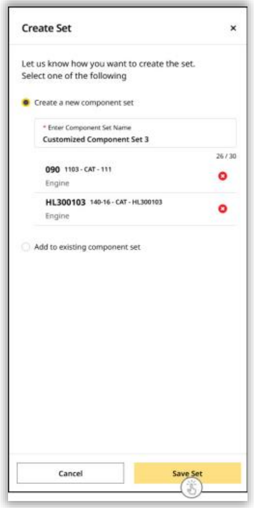
CATERPILLAR®

FLUID ANALYSIS *POWERED BY S•O•S℠ SERVICES* TRAINING WORKBOOK

REGISTER FLUID SAMPLES IN WEB (CONT.)

5

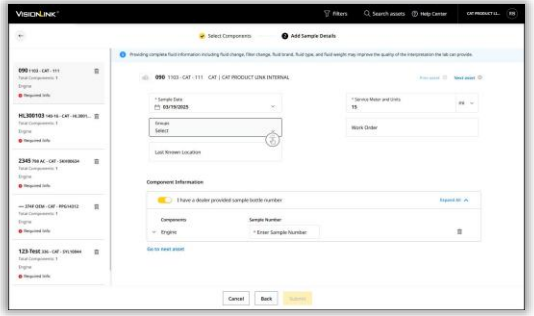
Create a new set, name the set, and select **Save set.**



6

In the **Add Sample Details** page, the first asset in the component set is selected for you.

Note: The **Sample Date** is filled in for you. If the data is available, the **Service Meter** value will be populated. You can update the **Service Meter**. Optionally, select the **Group**.



7

The **Component Information** toggle labeled **I have a dealer provided sample bottle number** is on by default. If your dealer did not provide sample bottle numbers, turn it off and select your dealer from the drop-down menu – VisionLink will generate the sample numbers.

Enter the sample numbers for each component. Use the **Expand All** option to save time.

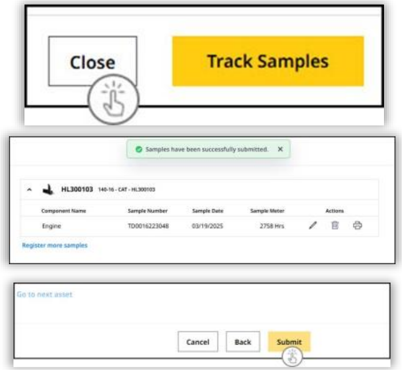
Provide as much detail as possible for each component (e.g., fluid change, filter change, fluid brand) to improve the quality of the sample interpretation.

If you set the priority to **Urgent**, you must enter notes explaining the urgency.

8

After entering all the component information for the selected asset, select **Go to next asset** (if applicable) and complete the **Select Components** and **Add Sample Details** fields.

Then select **Next.** A **Submit Samples** confirmation message is shown. Select **Submit Samples.** Select **Close.**



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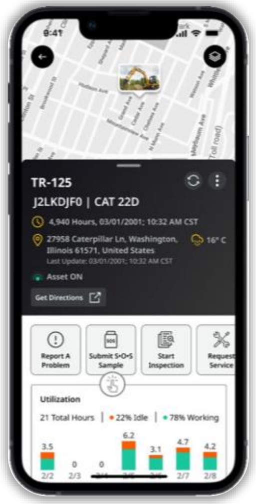
REGISTER FLUID SAMPLES ON A MOBILE DEVICE

REGISTER FLUID SAMPLES ON A MOBILE DEVICE

Registering fluid samples using the VisionLink® mobile app makes it easy for you to set up and reuse frequently sampled component sets for assets, associate your assets' components with dealer-provided sample bottle numbers, and track your samples as they progress through the lab. This process can save time and reduce the risk of submitting unidentifiable samples.

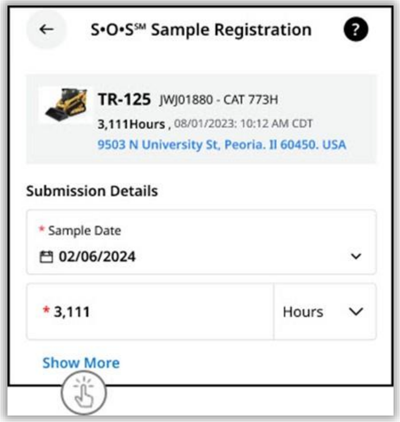
1

Search for the asset on your mobile device and select **Submit S•O•SSM Sample.**



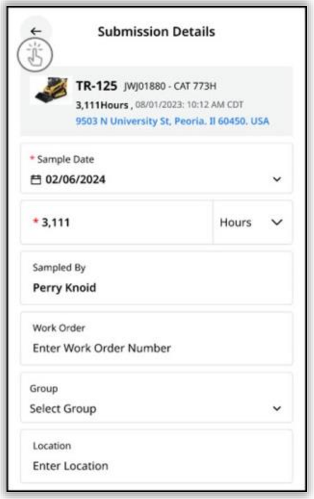
2

In the **S•O•SSM Sample Registration** > **Submission Details** section, today's date is the **Sample Date** by default. If the asset is connected and subscribed, it displays the latest **Service Meter** value and **Primary Service Meter Type**. Select **Show More** to add additional details.



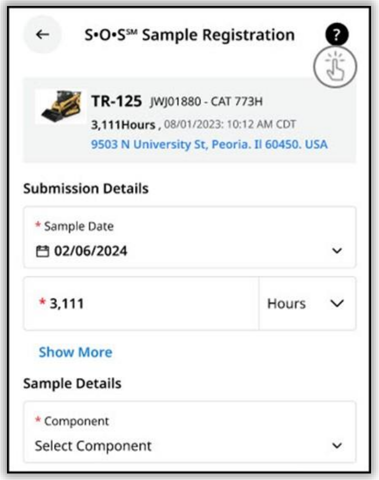
3

Select the back arrow to return to the **S•O•SSM Sample Registration** page.



4

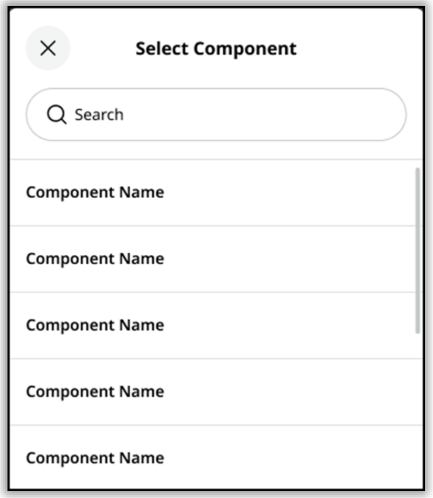
Select the black question mark icon to view a tutorial that showcases specific steps for registering samples on your mobile device.



REGISTER FLUID SAMPLES ON A MOBILE DEVICE (CONT.)

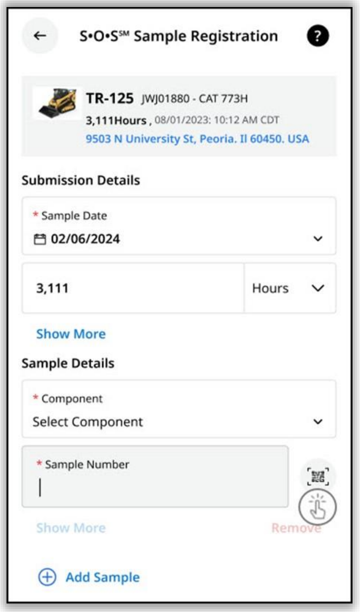
5

In the **Sample Details** section, select the **Component** from the drop-down menu. If the asset is a Cat Make, you can search for the component by description or name in the **Select Component** pop-up. For assets other than Cat Make, you can select a component or add components manually.



6

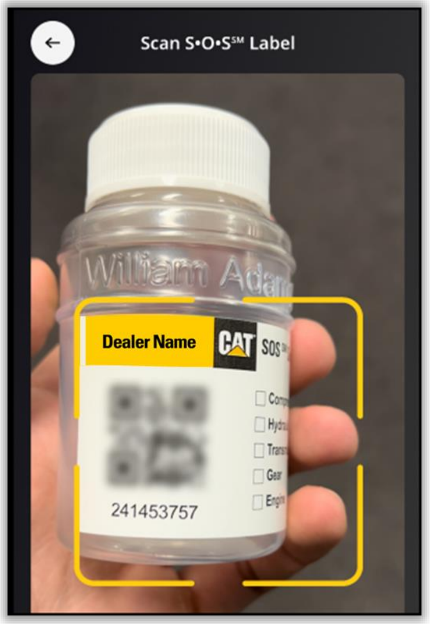
Enter the **Sample Number.** If you have a sample bottle provided by your dealer, then select the QR Scan icon.



7

Scan the QR code on the SOS fluid sample bottle.

Disclaimer: Photo does not reflect an actual dealer's bottle.



8

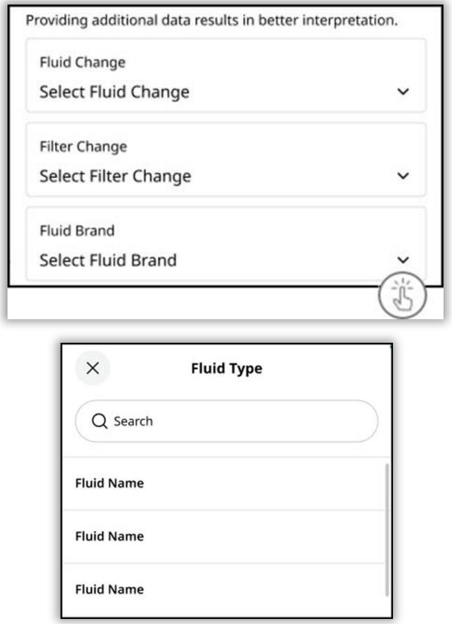
After the QR code is scanned, you are directed to the **Sample Details** page with the auto-populated **Sample Number.** Select **Show More** to add additional information.

FLUID ANALYSIS *POWERED BY S•O•S SM SERVICES* TRAINING WORKBOOK

REGISTER FLUID SAMPLES ON A MOBILE DEVICE (CONT.)

9

The **Fluid Type** and **Fluid Grade** fields become available when you select from the **Fluid Brand** drop-down menu.

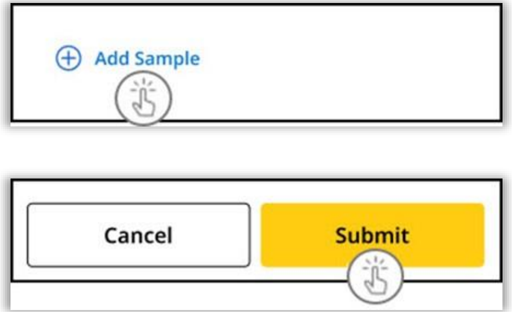


10

If you change the priority to **Urgent**, you must enter notes explaining the urgency.

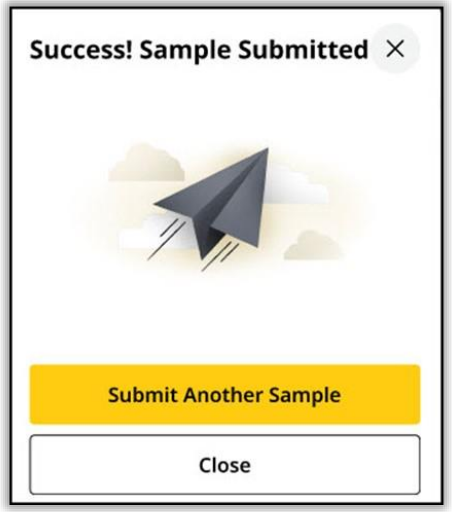
11

If you want to add additional samples from the same asset, select **Add Sample**. Once you are ready to submit, select **Submit**.



12

In the confirmation window, you can select **Submit Another Sample** to register a new sample or select **Close**.



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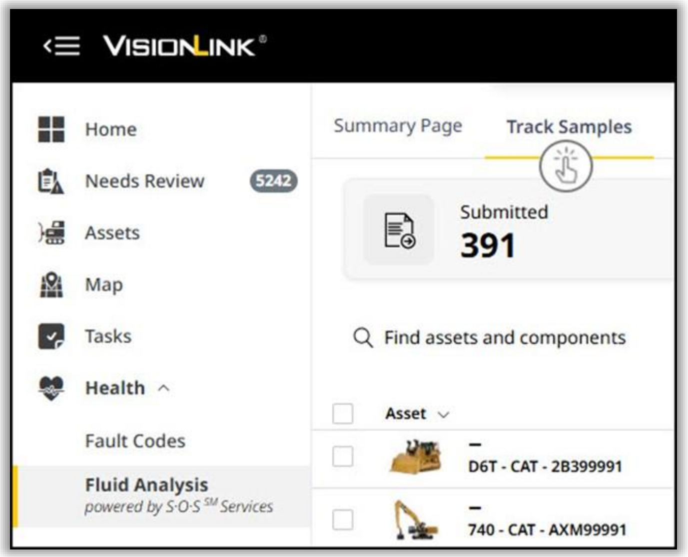
TRACK FLUID SAMPLES IN VISIONLINK®

FLUID ANALYSIS *POWERED BY S•O•S SM SERVICES* TRAINING WORKBOOK

TRACK FLUID SAMPLES IN VISIONLINK®

1

Select the **Track Samples** tab.

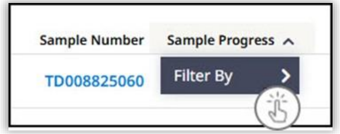


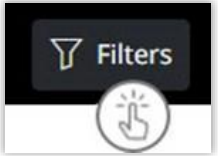
2

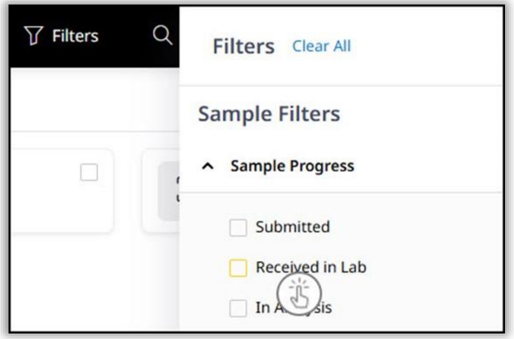
By default, VisionLink shows you samples in **Submitted**, **Received in Lab**, and **In Analysis** states.

3

You can also filter by the **Sample Progress** drop-down menu or **Filters** in the top navigation bar. Samples can also be filtered by selecting / deselecting the **Submitted**, **Received in Lab**, and **In Analysis** states at the top of the page.





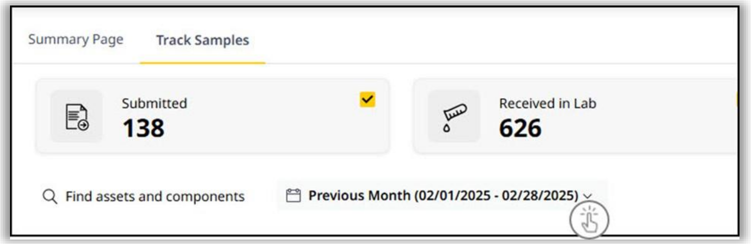


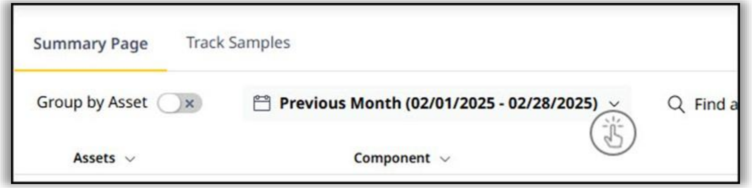
FLUID ANALYSIS *POWERED BY S•O•S SM SERVICES* TRAINING WORKBOOK

TRACK FLUID SAMPLES IN VISIONLINK (CONT.)

4

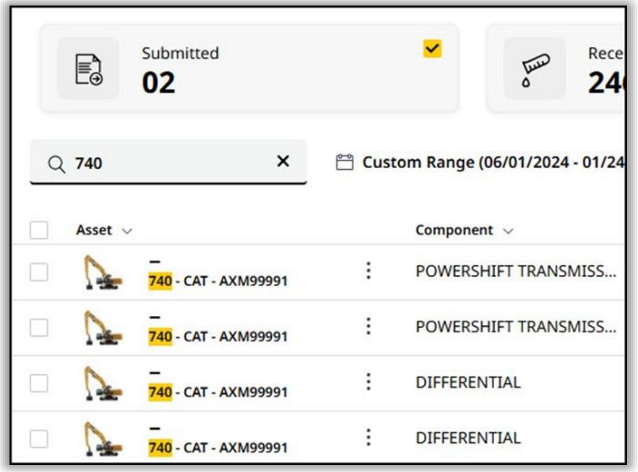
View sample activity for the last seven days or change the date range. If you change the date range, it will change in the **Summary Page** tab and vice versa.





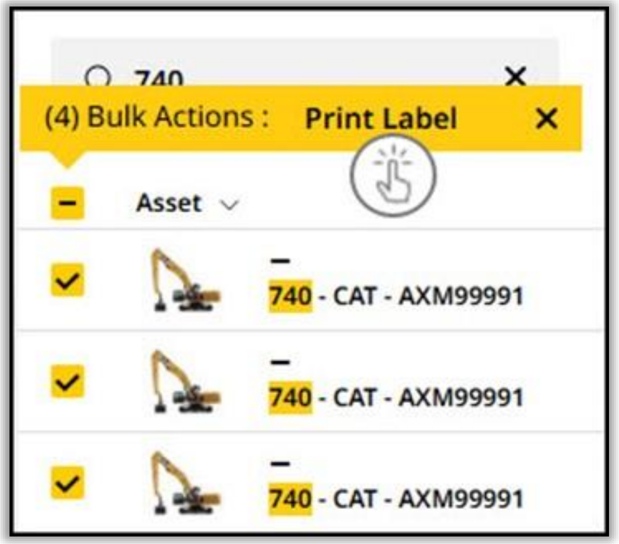
5

You can search for an asset to view sample activity for the selected date range and filters.



6

You can print sample labels in bulk for multiple assets in the **Track Samples** tab.



ADD ASSET WITH COMPONENTS

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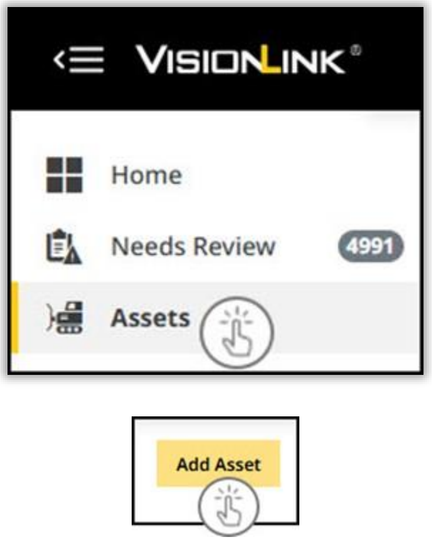
ADD ASSET WITH COMPONENTS

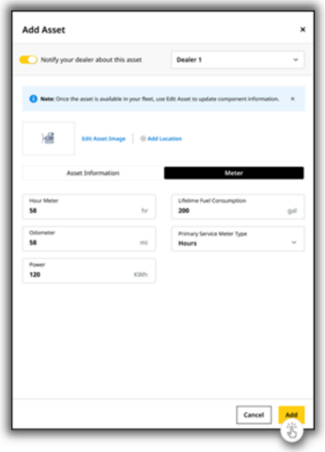
1

Select the **Assets** page.
Next, select the **Add Asset** button.



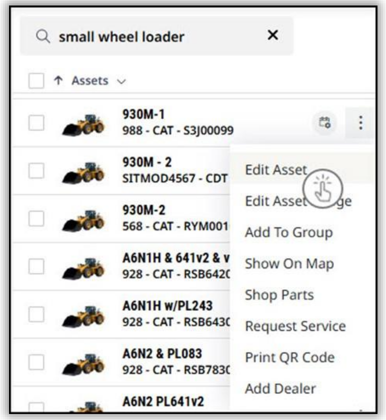
2

Complete the **Asset Information** tab fields and the **Meter** tab fields. Then select **Add**.



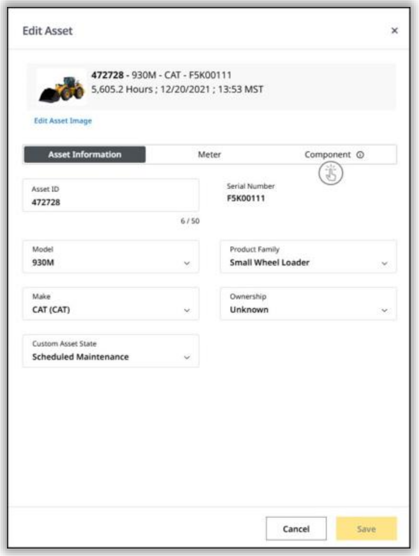
3

Once the asset is visible in your fleet from the **Assets** page, find the newly added asset and select **Actions menu** > **Edit Asset**.



4

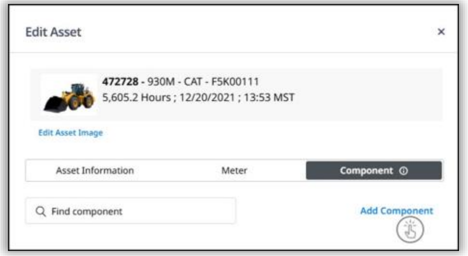
Select the **Component** tab.



ADD ASSET WITH COMPONENTS (CONT.)

5

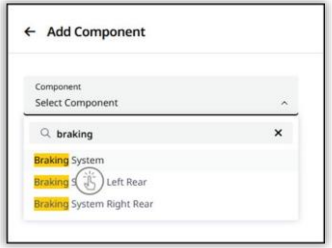
Select **Add Component.**



6

If this is a Cat Make, search for the component.

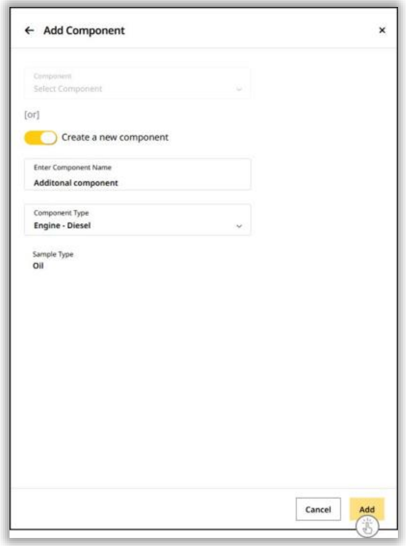
If this is a Make other than Cat, you can create a new component.



OR

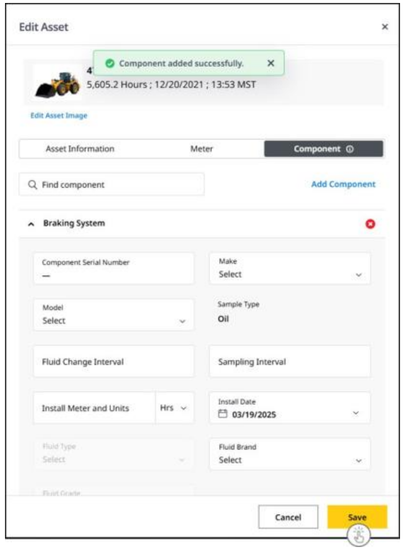
7

Complete the fields and select **Add.**



8

Once you see the success message, select **Save.**

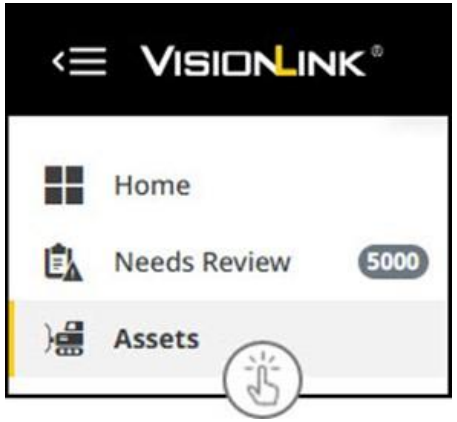


MANAGE COMPONENTS

MANAGE COMPONENTS

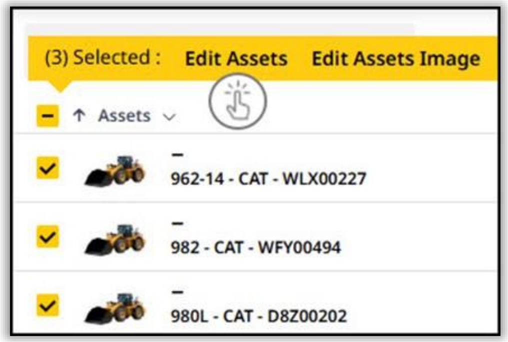
1

To add components to multiple assets, start by navigating to the **Assets** page.



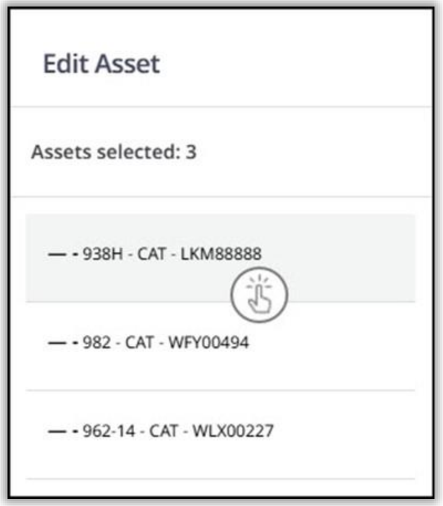
2

Find and select the check boxes for your assets. Then select **Edit Assets** from the bulk menu.



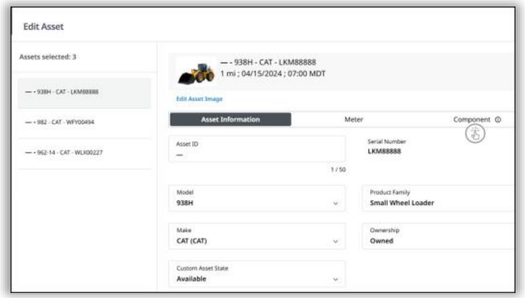
3

In the **Edit Asset** panel, select the first asset you wish to edit.



4

Next, select the **Component** tab from the **Edit Asset** panel.



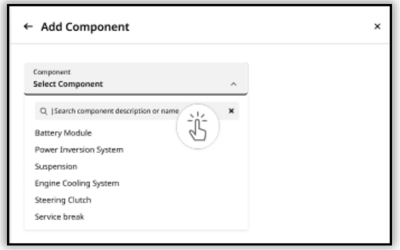
MANAGE COMPONENTS (CONT.)

5

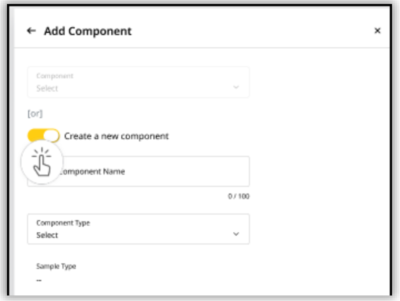
Select **Add Component.**

6

If this is a Make other than Cat, you select a component or create a new component.

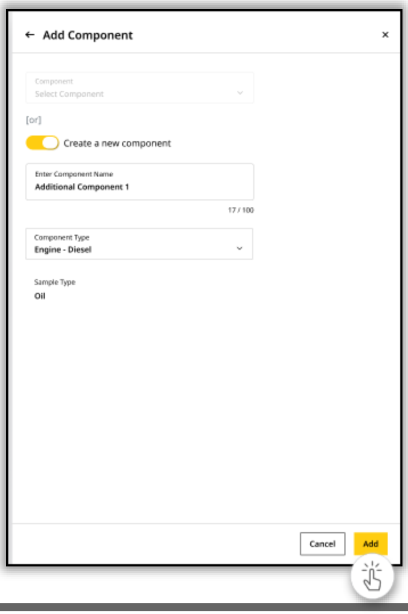


OR



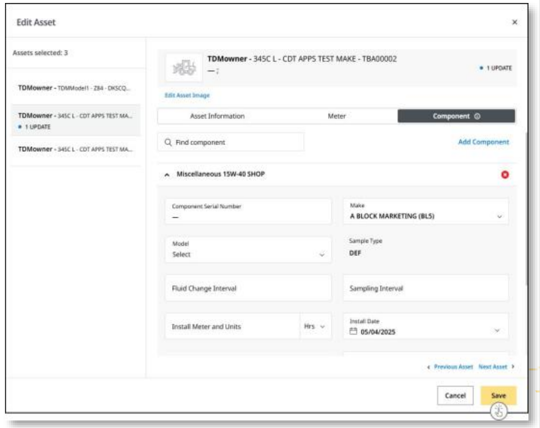
7

Complete the fields and select **Add.**



8

Select **Save** after making changes to all assets.

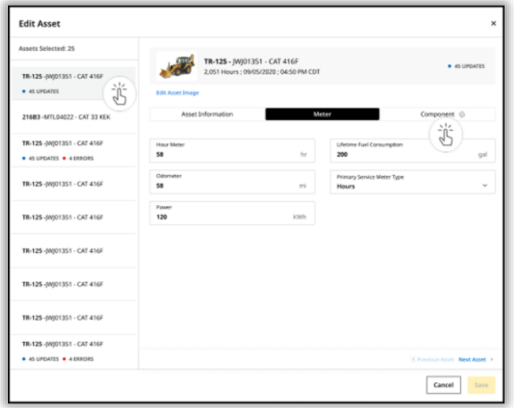


MANAGE COMPONENTS (CONT.)

See below to learn how to remove (delete) a component. **Note**: You cannot remove default components – you can only remove components that you or another user has added.

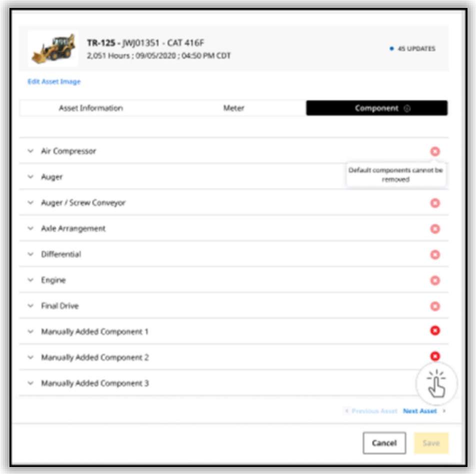
9

In the **Edit Asset** panel, select the asset and select the **Component** tab.



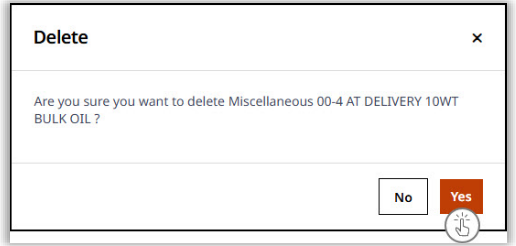
10

Select the red circle for the component you want to remove.



11

Select **Yes** to confirm the component you want to remove.



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ADD A FLUID ANALYSIS NOTIFICTAION

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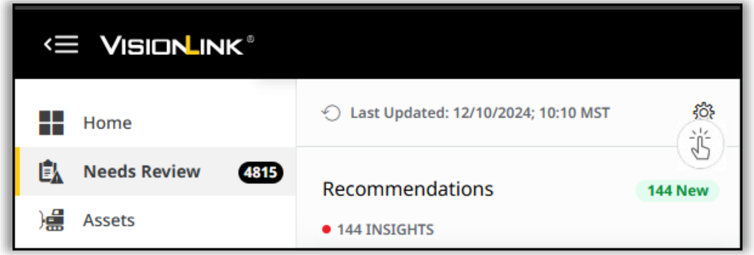
ADD A FLUID ANALYSIS NOTIFICATION

You can configure a notification that tells you when a fluid analysis result requires action so that you can intervene to prevent costly downtime.

1

In **Needs Review,** select the Settings icon.

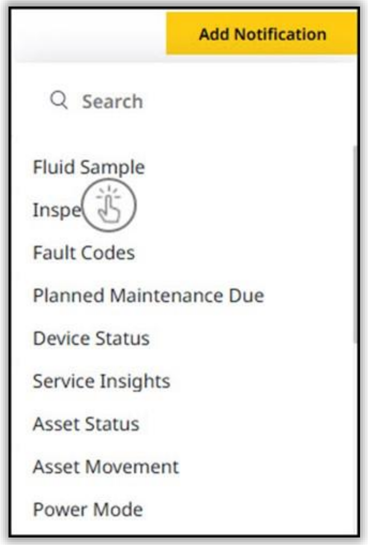


2

In **Manage** > **Notifications,** select the **Add Notification** button.

3

Select **Fluid Sample** from the drop-down menu.

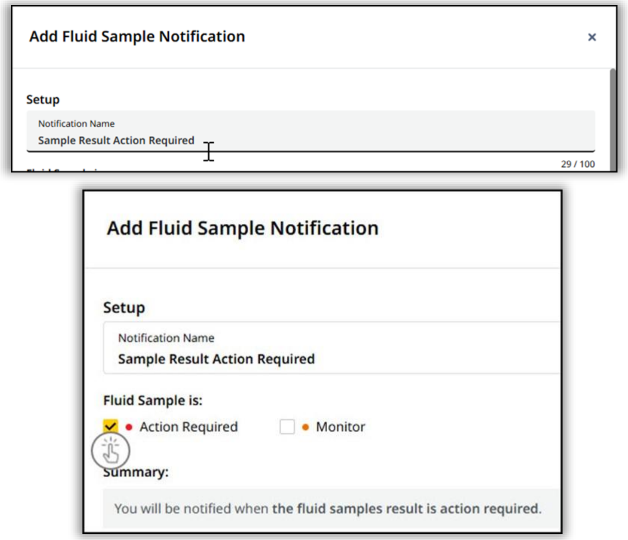


ADD A FLUID ANALYSIS NOTIFICATION (CONT.)

Specify the notification's parameters in the **Add Fluid Sample Notification** window. Add a notification that tells you when a fluid analysis result requires action.

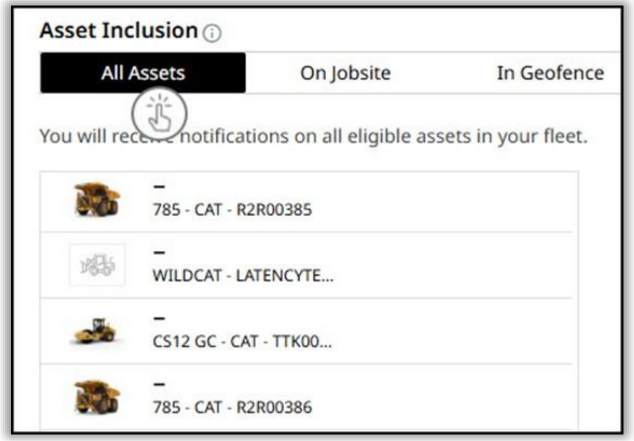
4

Enter the name of the notification (for example, enter **Sample Result Action Required**) and select the **Action Required** check box.



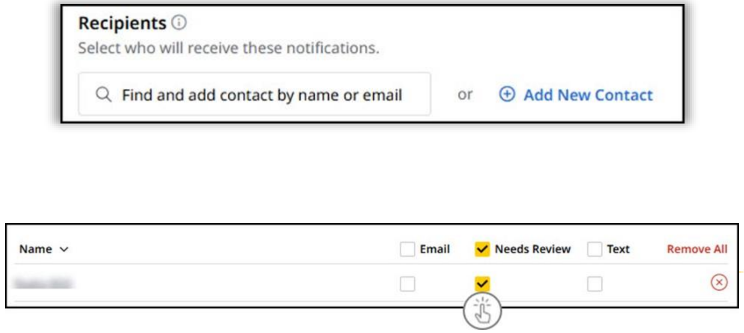
5

Include all assets. This will trigger a notification for all relevant assets whose fluid analysis result requires attention.



6

Scroll to **Recipients**. By default, your contact information is added to the recipients because you created the notification from the **Needs Review** page.



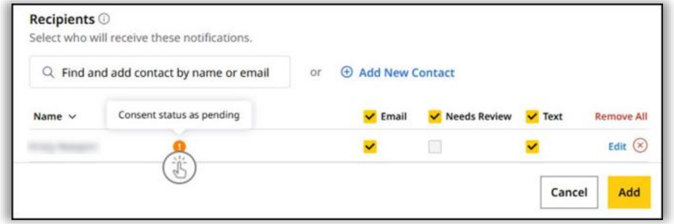
ADD A FLUID ANALYSIS NOTIFICATION (CONT.)

Add other recipients by finding the name or email address of the person you want to receive these notifications. If the person isn't found, select **Add New Contact** and enter the following:

7

Select any combination of the delivery methods using the check box(es):

- By default, **Needs Review** is selected – you and your recipients will see the notification in **Needs Review Health Issues.**
- Selecting **Email** will automatically accept your and the recipient's consent to receiving email notifications.
- The first time you (or your recipients) subscribe to a notification via **Text**, you (and your recipients) will receive text messages.

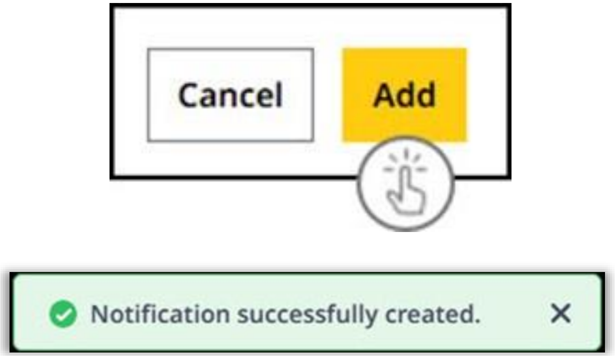


8

Select the information icon next to **Recipients** to learn more.

9

Select **Add.**



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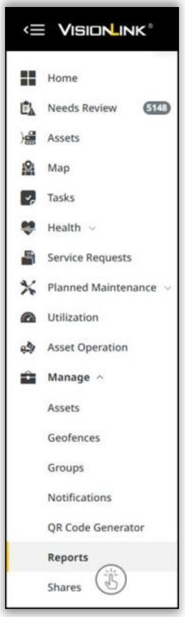
ADD A FLUID ANALYSIS REPORT

ADD A FLUID ANALYSIS REPORT

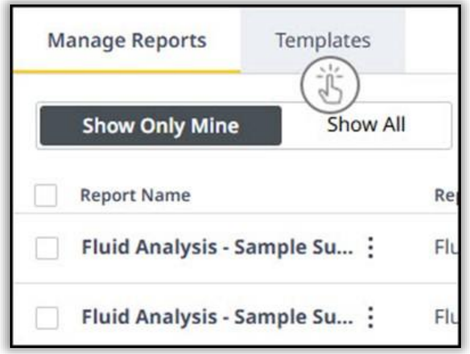
1

Select the **Manage** > **Reports** page.



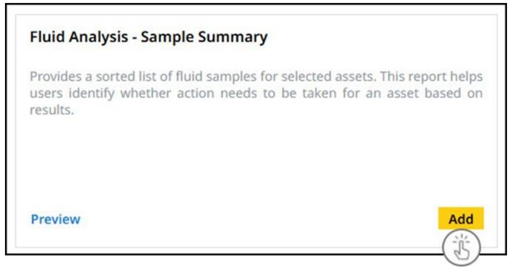
2

Select the **Templates** tab.



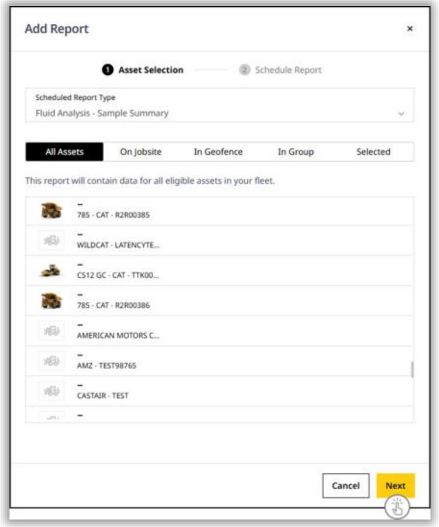
3

Add a **Sample Summary** report. Scroll to the report and select **Add**.



4

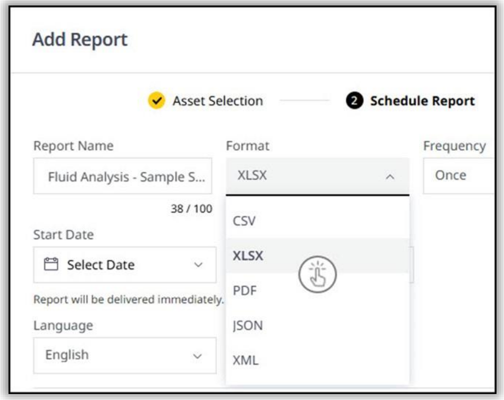
Select **All Assets** for the report. Then select the **Next** button in the **Add Report** window to go to the **Schedule Report** tab.



ADD A FLUID ANALYSIS REPORT (CONT.)

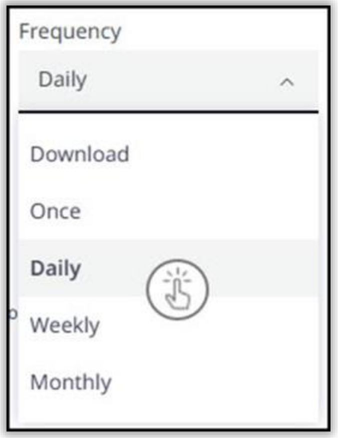
5

Select the **Format** drop-down arrow and select **XLSX.**



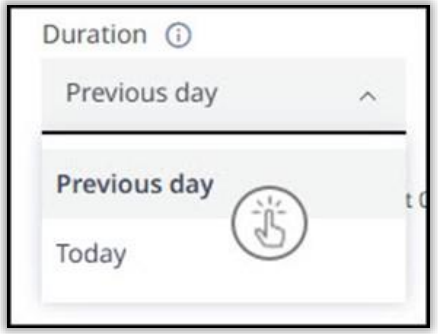
6

Select **Daily** from the **Frequency** menu to receive this report every day.



7

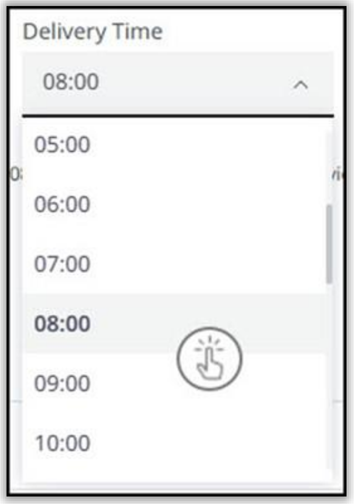
Select the **Previous** day from the **Duration** drop-down arrow to include the previous day's data. The data report includes sample results for all severity levels (Action Required, Monitor, and No Action).



8

Choose your preferred **Delivery Time** in your respective time zone for this report.

*No end date will be added. The report will be created in your preferred set language.



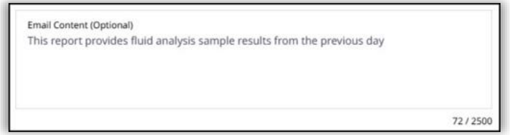
ADD A FLUID ANALYSIS REPORT (CONT.)

9

Optional: Change the **Email Subject** to something other than the report name.

10

Optional: Add additional details to be included in the report email in the **Email Content** field.



11

Choose who you would like to subscribe to this daily report. *Before entering the recipient's email, you must have consent from the recipient(s).

12

Select **Add Recipient** and enter recipients from your contacts list one at a time. Then select **Add.** You will now see a new confirmation message.
Optional: Enter email address(es) to subscribe to the report.