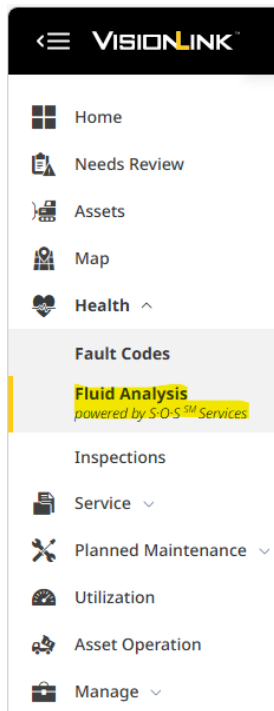


Quick Guide to View Fluid Sample Results in VisionLink

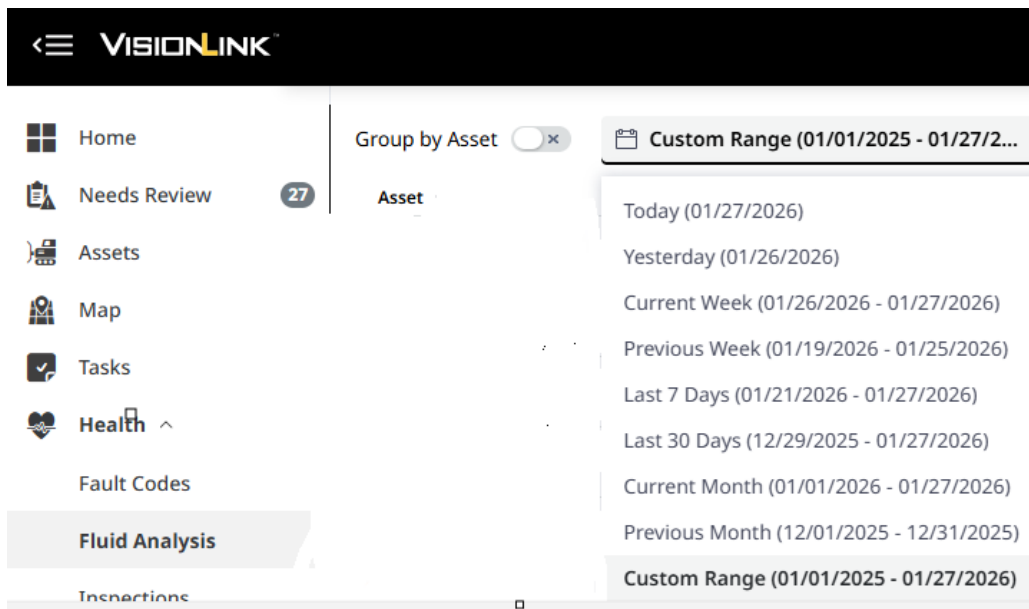
Login to VisionLink

<https://vl.cat.com>

Scroll down to “Fluid Analysis powered by SOS Services” under “Health”

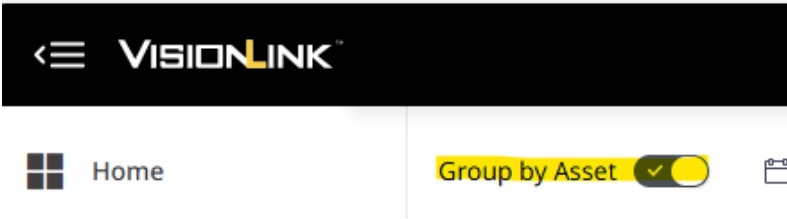


Set Date Range



Toggle “Group by Asset”

- This will allow individual sample(s) to be viewed by compartment or for samples to be summarized by serial number



To view sample details, click on asset and then click on “blue” sample number to view sample details



ZB24852

262D3 - CAT - ZB204852

● 0 ACTION REQUIRED

● 0 MONITOR

● 1 NO ACTION

● 0 ACTION REQUIRED

● 0 MONITOR

● 1 NO ACTION

📅

Custom Range (01/01/2025 - 01/27/2...

▼

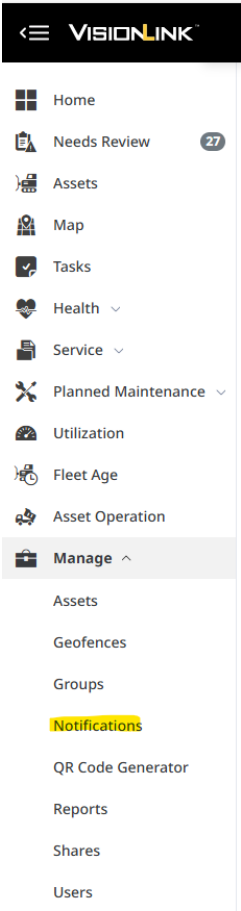
🔍

Find samples

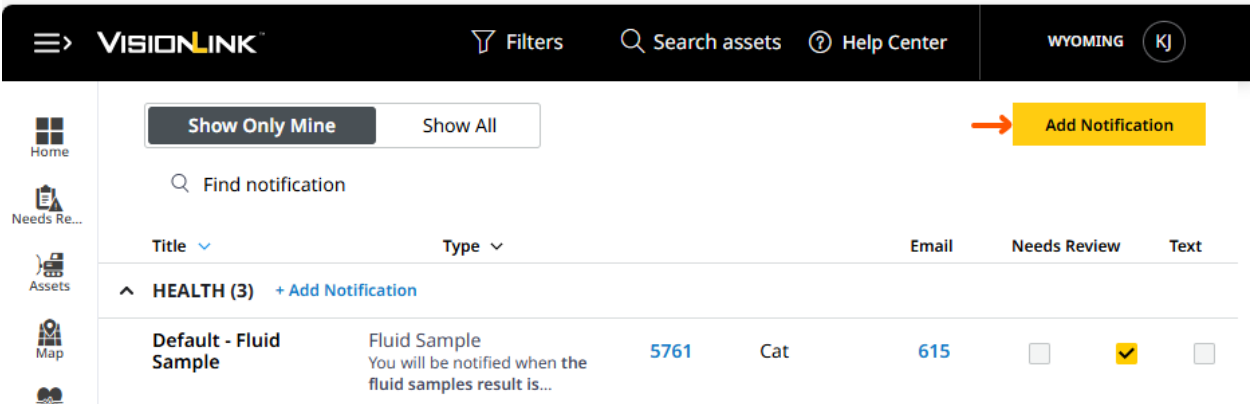
Sample ▼	↓ Sample Date ⓘ ▼	Analysis Date ⓘ ▼	Severity ▼
ENGINE			
E490-55325-0015 🔗	11/20/2025	11/21/2025	⋮ ● NO ACTION

Notifications –

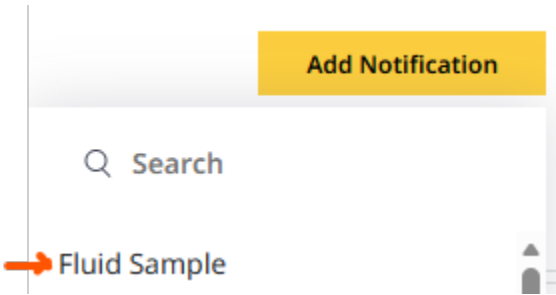
- Notifications are set so that the user can be notified there is either a “Monitor” – Yellow or an “Action Required” - Red sample
- To set a notification, select “Notifications” under the “Manage” tab



Select “Add Notification”



Select “Fluid Sample”



Check desired notification(s) - “Action Required” and/or “Monitor”

Add email address for Recipient; Select “Add”

Add Fluid Sample Notification

Setup

Notification Name

0 / 100

Fluid Sample is:

☐ Action Required☐ Monitor

Summary:

Asset Inclusion

All Assets

On Jobsite

In Geofence

In Group

Selected Assets

You will receive notifications on all eligible assets in your fleet.

130

824C - CAT - 85X00474

14012

JOHNDEERE_UNKNOW...

141

D9L - CAT - 14Y02667

147

D9L - CAT - 14Y03294

157

D9L - CAT - 14Y02102

1610

631D - CAT - 24W01934

Recipients

Select who will receive these notifications.

Cancel

Add

Reports -

- Provides a summary email of samples that have been processed.
- Summary emails can be daily, weekly, monthly etc.
- This is probably the closest method to view sample results like today's present emails



- Home
- Needs Review
- Assets
- Map
- Health ▾
- Service ▾
- Planned Maintenance ▾
- Utilization
- Asset Operation
- Manage ^
 - Assets
 - Customer Users
 - Dealer Settings
 - Dealer Users
 - Geofences
 - Groups**
 - Notifications
 - QR Code Generator
 - Registrations
 - Reports**

Select “Add Report”

VISIONLINK Filters Search assets Help Center WYOMING KJ

Home Manage Reports Templates Needs Re... Find Reports 0 < > Add Report

	Report Name	Report Type	Owner	Frequency	Format	Recipients
☐						

Scroll down to “Fluid Analysis”

Add Report

1 Asset Selection

2 Schedule Report

Scheduled Report Type

Select Report Type

Fleet Fuel

Fleet Status

Fleet Usage

Fleet Utilization

Fluid Analysis

Site Runtime

Select assets for report (typically “All Assets”)

Add Report

1 Asset Selection

2 Schedule Report

Scheduled Report Type

Fluid Analysis

All Assets

On Jobsite

In Geofence

In Group

Selected Assets

This report will contain data for all eligible assets in your fleet.

323-07 - CAT - RAZ11351

0021

375H - SULLAIR - 2010...

004-0031

777G - CAT - RDR00352

004-0032

777G - CAT - RDR00243

005-0018

D10R - CAT - 3KR01414

005-0026

D11T - CAT - JEL00153

007-0006

16M - CAT - R9H00690

Select Report “Format” and Report “Frequency”

Add Report

1 Asset Selection

2 Schedule Report

Report Name

Fluid Analysis Report

21 / 100

Start Date

Select Date

Report will be delivered immediately.

Language

English

Format

CSV

CSV

XLSX

PDF

JSON

XML

Frequency

Once

Download

Once

Daily

Weekly

Monthly

Add Report

1 Asset Selection

2 Schedule Report

Report Name

Fluid Analysis Report

21 / 100

Start Date

Select Date

Report will be delivered immediately. Date range is limited to 31 days

Language

English

Format

CSV

Frequency

Once

Download

Once

Daily

Weekly

Monthly

Next, add “Email Subject Line” and “Email Recipient”
Select “Add” at bottom of menu

Add Report

Email Information

Email Subject

Fluid Analysis Once Report

26 / 200

Email Content (Optional)

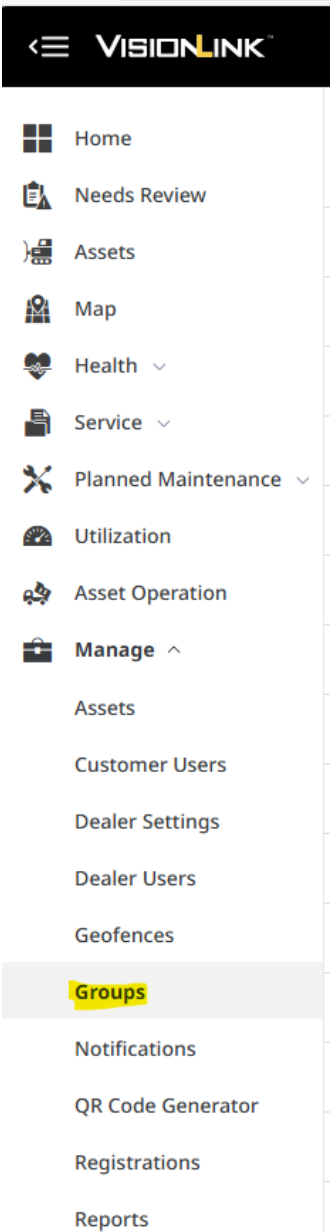
0 / 2500

Add Recipient (Consent ⓘ)

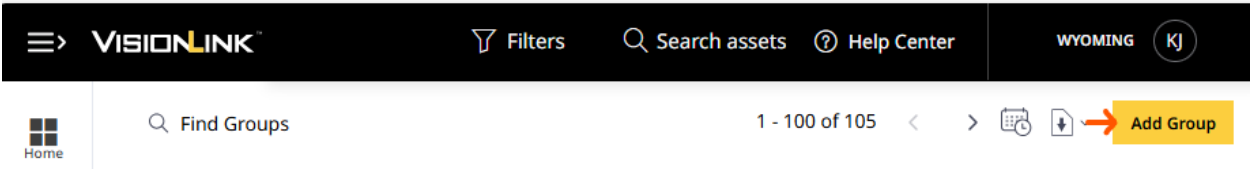
🔍 Add recipient

Groups -

- Groups assets into subsets like SOS Jobsites (Casper Machines, Cheyenne Machines, etc.)



Select “Add Group”



Enter “Group Name” and Description

Assets can be added to group either “manual” or “automatic”

Under the manual option, find the asset and then select (+) to add to the Group

Add Group

Setup

Group Name

Description (optional)

Privacy

☒ Public (Visible to all users within my organization)

☐ Private (Only visible to me)

Asset Update Type

Select a group type

☒ **Manual**

Assets will be added or removed from this group only when someone makes an update.

☐ **Automatic**

Assets will automatically be added or removed from this group based on your selected criteria below.

Search and select assets to add to the group.

Find Asset

Asset

323-07 - CAT - RAZ11351

0021
375H - SULLAIR - 201007310021

004-0031
777G - CAT - RDR00352

Find Asset

Remove All (0)

Using Groups to Filter Asset SOS sample results

- Once a group has been set up (“DOZERS” in this example)

Add Group

DOZERS

6 / 500

Privacy

☒ Public (Visible to all users within my organization)

☐ Private (Only visible to me)

Asset Update Type

Select a group type

☒ Manual

Assets will be added or removed from this group only when someone makes an update.

☐ Automatic

Assets will automatically be added or removed from this group based on your selected criteria below.

Search and select assets to add to the group.

Find Asset

↑ Asset ↓

Add All (313)

1100

D9L - CAT - 14Y01372

⊖

116

D9L - CAT - 14Y02004

⊖

120

D9L - CAT - 14Y02139

⊖

127

D9L - CAT - 14Y02377

⊖

Find Asset

Remove All (4)

1100

D9L - CAT - 14Y01372

⊗

116

D9L - CAT - 14Y02004

⊗

120

D9L - CAT - 14Y02139

⊗

127

D9L - CAT - 14Y02377

⊗

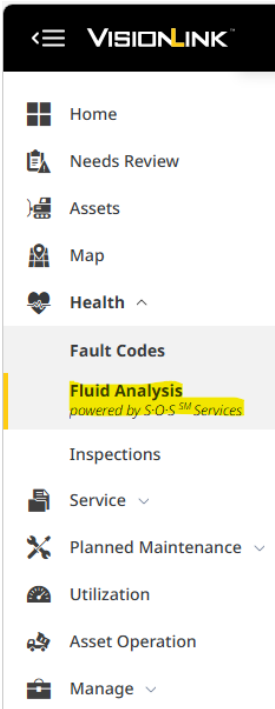
Cancel

Add

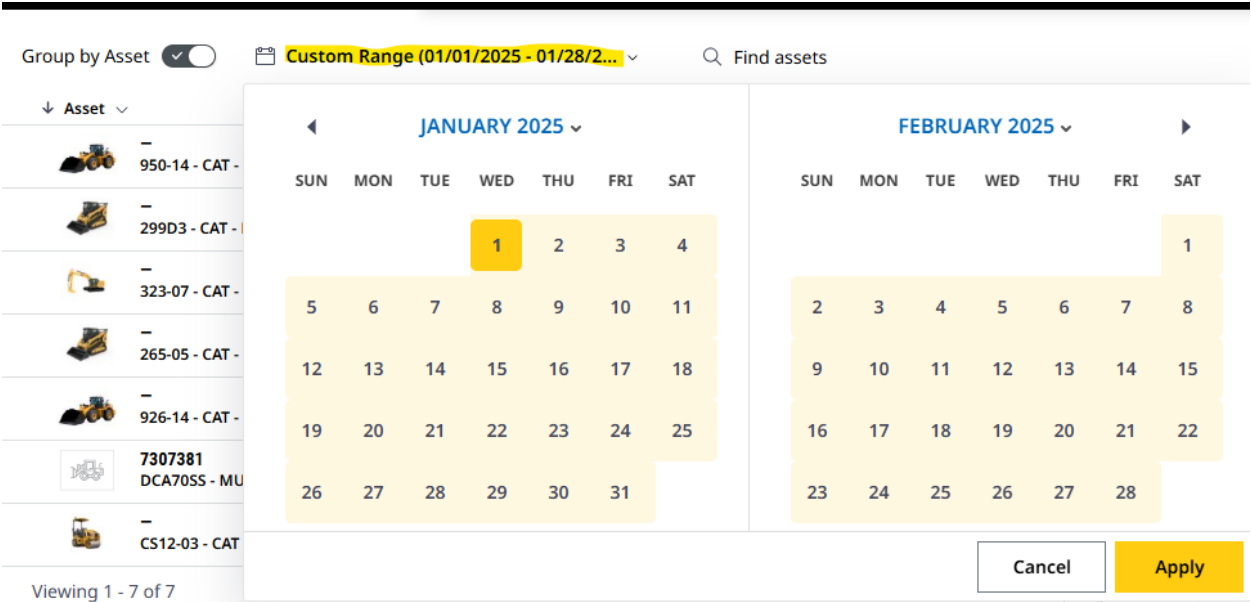
“DOZERS” Group (example)

Home Needs Re...	Find Groups	1 - 1 of 1			
	Group Name	Assets	Asset Update Type	Privacy	Creation Date
	★ DOZERS	4	Manual	Public	01/28/2026

To view sample results, go to “Fluid Analysis” from the main VisionLink drop-down menu



Set Date Range

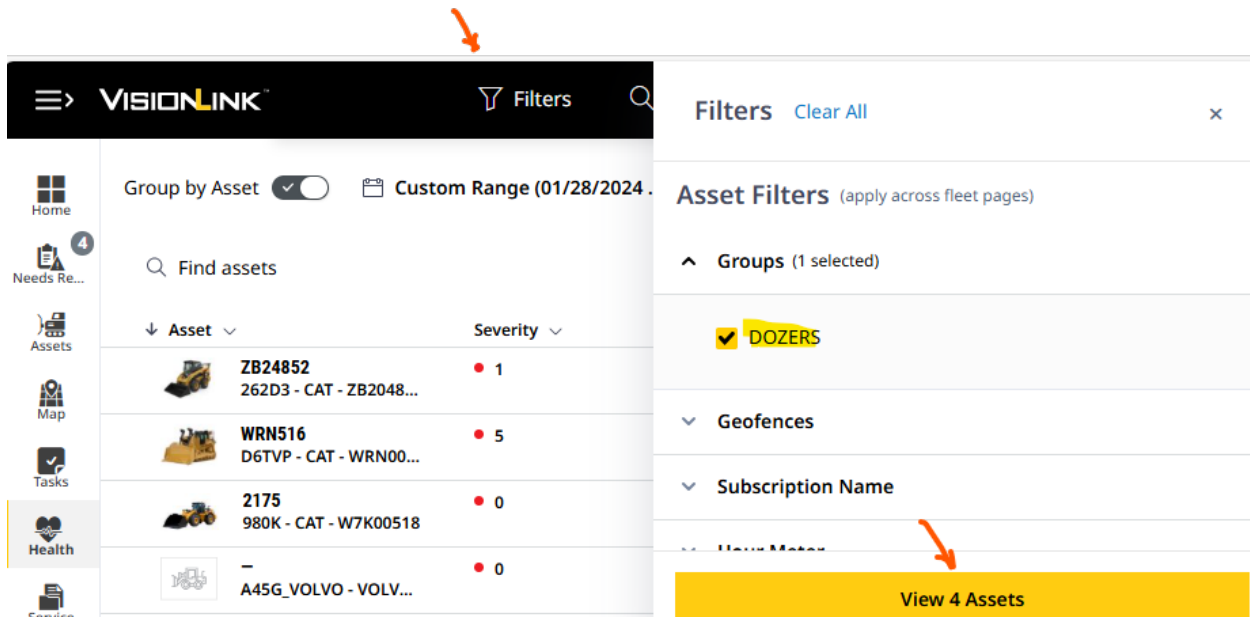


Select “Filters” at the top of the menu

Select the “Group Name” (i.e. Dozers) under Asset Filters

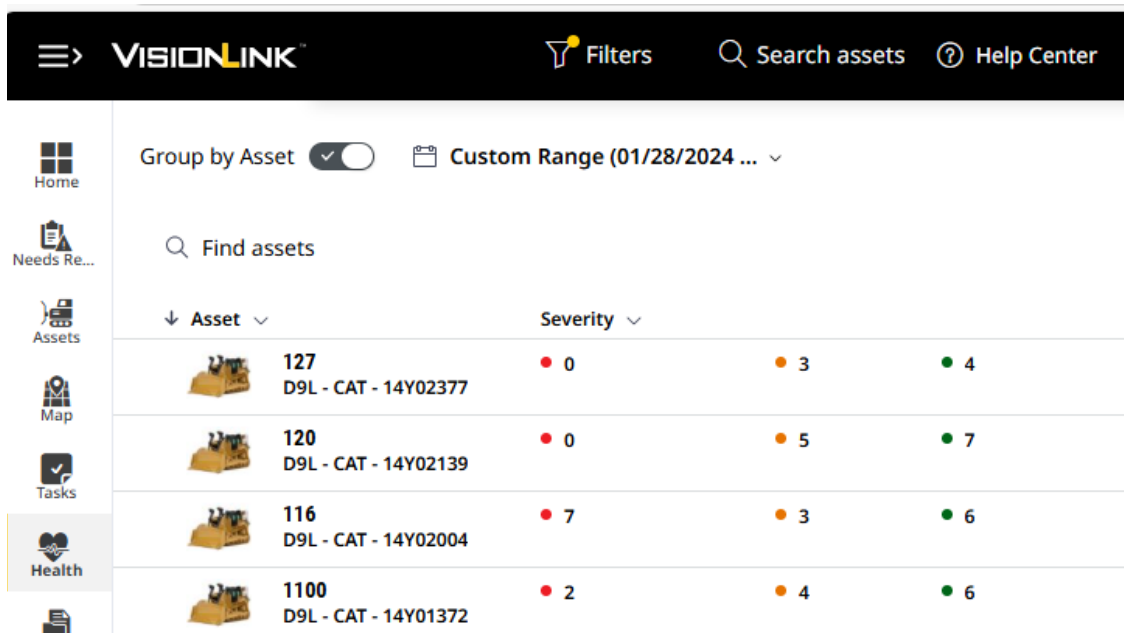
Select “View Assets” (four assets in this example)

- FYI - “View Assets” tab will not highlight if there are no samples to view or there are no samples within the selected date range)



The screenshot shows the VISIONLINK interface. On the left is a sidebar with navigation icons: Home, Needs Re..., Assets, Map, Tasks, Health (highlighted), and Service. The main area displays a table of assets with columns for Asset, Severity, and a red dot indicator. The 'Filters' menu is open on the right, showing 'Asset Filters' with a 'Groups (1 selected)' section where 'DOZERS' is checked. Below this are sections for 'Geofences' and 'Subscription Name'. At the bottom of the filters panel, a yellow button labeled 'View 4 Assets' is highlighted with an orange arrow.

In this “Dozer” group example, there are samples for the dozers within the selected date range



The screenshot shows the VISIONLINK interface with the 'Assets' section selected in the sidebar. The main area displays a table of assets for the 'Dozer' group. The table has columns for Asset, Severity, and a red dot indicator. The 'Assets' section is highlighted in the sidebar. The table lists four assets with their IDs, names, and severity levels.

Asset	Severity	Red Dot	Green Dot
127 D9L - CAT - 14Y02377	0	3	4
120 D9L - CAT - 14Y02139	0	5	7
116 D9L - CAT - 14Y02004	7	3	6
1100 D9L - CAT - 14Y01372	2	4	6