

AAON Rep Portal and ECat 6

How to Manage your Rep Office's Users

The AAON Rep Portal is a powerful resource for AAON Sales Representatives. Sales Reps can access orders, download AAON product documents, access training, and more.

Each Sales Rep office will have an assigned **Firm Manager**. The **Firm Manager** is the office's gatekeeper to the AAON Rep Portal. This guide will help the **Firm Manager** add, update, and manage users.

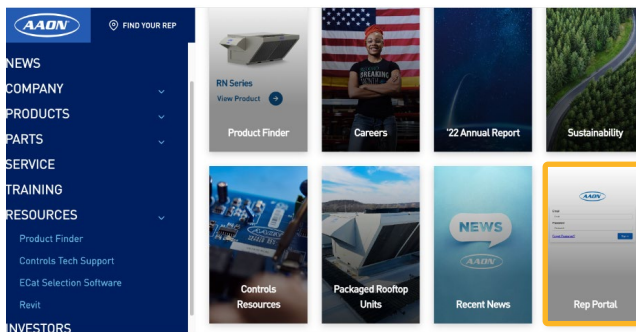
Managing Users

As the **Firm Manager**, you may have to update user profiles and their access to different areas of the AAON Rep Portal.

1.

To manage your users, login to the [AAON Rep Portal](#).

There are two ways to access the AAON Rep Portal. You can go directly to the site at reps.aaon.com or from the main [AAON website](#) click on **Rep Portal**.



2.

You will be prompted to **Sign in** with your credentials.

Email

whitney.tapp@aaon.com

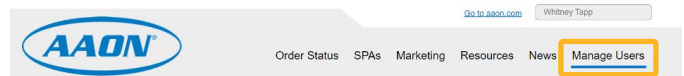
Password

[Forgot Password?](#)

Sign in

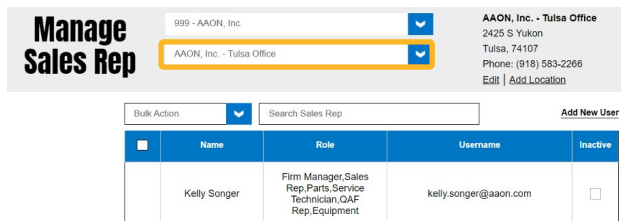
3.

Click on **Manage Users** to access your rep office's users.



4.

If you have multiple locations, you can toggle between them with the **second drop-down menu**.



Each user will be listed by:

- **Name**
- **Role** — current access they have to different areas of the site.
- **Username** — the email address they use to log into the site.
- **Inactive Option** — check this box if you want to disable a user but not delete them from the list.

5.

Click on a **Name**.



6.

From here you can edit the user's account, such as their **password, name, location access, and user role**.

Edit a User

[Go Back >>](#)

→ Whitney

→ Tapp

→ (918) 583-2266

→ whitney.tapp@aaon.com

→ Password

The password must be at least 8 characters long and contain at least one number.

Confirm Password

→ **Select Location**

- ☐ 997 - AAON - Parkville
- ☐ 103 - AAON Air Wise (inactive)
- ☐ 611 - AAON Coil Products (inactive)
- ☐ 998 - AAON Coil Products, Inc. - Main Office
- ☐ STK - AAON, Inc. - Tulsa (inactive)

→ **Select Role**

| | |
|--|---|
| <input checked="" type="checkbox"/> Firm Manager | <input checked="" type="checkbox"/> Equipment |
| <input checked="" type="checkbox"/> Sales Rep | <input type="checkbox"/> QAF Admin |
| <input checked="" type="checkbox"/> Parts | <input type="checkbox"/> QAF AAON Tech |
| <input checked="" type="checkbox"/> Service Technician | <input type="checkbox"/> QAF Regional |
| <input checked="" type="checkbox"/> QAF Rep | <input checked="" type="checkbox"/> Accounting Only |
| <input type="checkbox"/> QAF Tech | |



Roles

You have the option to assign or change a user's role at any time. Roles determine what access that user will be granted.

| ROLE | DEFINITION AND ACCESS |
|--------------------|---|
| Firm Manager | <p>A firm manager is the one who manages the users' accounts. They have access to:</p> <ul style="list-style-type: none">• Manage Users |
| Sales Rep | <p>Those assigned a Sales Rep role will have access to the following:</p> <ul style="list-style-type: none">• Order Status• SPAs• Marketing — resources like images, promotional items, etc.• Resources — Documents Viewer, Swap Shop, Sales Rep Resource library, etc.• News <p><i>Assign this role to the sales representatives at your office, and any employees that need access to your order information.</i></p> |
| Service Technician | <p>Those assigned a Service Technician role will have access to the following:</p> <ul style="list-style-type: none">• Documents Viewer <p><i>Assign this role to the service technicians at your office.</i></p> |
| Parts | <p>Those assigned a Parts role will have access to the following:</p> <ul style="list-style-type: none">• Direct access to ordering from the Part Website• Document Viewer• Parts Resources and Presentations <p><i>Assign this role to those that need access to the AAON Parts Website.</i></p> |
| QAF Rep | <p>This role grants access to the Warranty site. A QAF Rep will have access to:</p> <ul style="list-style-type: none">• Create Claims• Review Claims and Submit to AAON• Claim History <p><i>Assign this to Sales Reps and Internal Service Techs who need access to the Warranty site.</i></p> <p>More of an administrative and approval role than an outside sales rep role.</p> |
| QAF Tech | <p>This role grants access to the Warranty site. A QAF Tech will have access to:</p> <ul style="list-style-type: none">• Create Claims• Submit Claims to QAF Reps• Claim History <p><i>Assign this to Internal Service Technicians that need claims reviewed by a QAF Rep or External Service Technicians who need access to the Warranty site.</i></p> |
| Accounting | <p>This role grants access to the Debit Memos and Statements on the Documents Viewer.</p> <p><i>Assign this to website users from your accounting department.</i></p> |



Adding a New User

1.

Click on **Add New User**.

| Bulk Action | Name | Role | Username | Inactive |
|--------------------------|--------------|--|-----------------------|--------------------------|
| <input type="checkbox"/> | Kelly Songer | Firm Manager, Sales Rep, Parts, Service Technician, QAF Rep, Equipment | kelly.songer@aaon.com | <input type="checkbox"/> |

2.

Fill out the following information for the User:

- **First and Last Name**
- **Office Phone Number**
- **Email Address** — this will be their username.
- **Password** — the user will have the option to change their password once they log into the site.
- **Select Location** — **You must assign a Rep Code location to every user.** If the user needs access to other rep codes associated with your office, assign those as well.
- **Select Role** — select the roles they need for site access.

Edit a User

[Go Back >>](#)

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Tapp

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Select Location

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Select Role

| | |
|--|--|
| <input checked="" type="checkbox"/> Firm Manager | <input checked="" type="checkbox"/> Equipment |
| <input checked="" type="checkbox"/> Sales Rep | <input type="checkbox"/> QAF Admin |
| <input checked="" type="checkbox"/> Parts | <input type="checkbox"/> QAF AAON Tech |
| <input checked="" type="checkbox"/> Service Technician | <input type="checkbox"/> QAF Regional |
| <input checked="" type="checkbox"/> QAF Rep | <input checked="" type="checkbox"/> AccountingOnly |
| <input type="checkbox"/> QAF Tech | |

AAON Rep Portal Support

If you need assistance with managing the users at your rep office, please contact the AAON Marketing department at: marketing@aaon.com.

Updating Rep Office Contact Information on AAON Website—Rep Finder

www.aaon.com/contact#find-your-rep

If you find that your rep office contact information is incorrect or outdated on the Rep Finder of the AAON website, please contact registration@aaon.com to have the information updated.




ECat 6 Login

If this is your first time logging into ECat 6, follow the instructions below.

1.

Click **Forgot your password?** on the initial login screen.

Note: The AAON Employee button is for AAON employees only.



Sign in with your email address

Password

Forgot your password?


Sign in

AAON Employee

2.

Enter your **email address**.

Click **Send verification code**.



Please enter your email address. You will receive a verification code in your email, titled "Microsoft on behalf of AAONB2C", from msonlineserviceteam@microsoftonline.com. If you don't receive the code within two minutes, be sure to check your spam folder.

Send verification code

3.

You will be sent an email asking you to update your password and set-up two-factor authentication.

Follow the on-screen prompts to finish setting up your login.

If you have any issues, please contact:

ECatsupport@aaon.com.

