QUICK REFERENCE GUIDE



USING THE ACCOUNT DASHBOARD

Purpose: This document is to be used by new customers.

NEW DOMAIN

The Swagelok e-Commerce Site domain has changed to products.swagelok.com. Please update all bookmarks and favorites.

ACCOUNT DASHBOARD

1.	In order to access the account dashboard. Click on "Log in or Register" in the top right corner of page. Select Login.			
	• Find a Location \bigoplus English \checkmark \square Log In or Register \checkmark			
2.	Enter your login information. Once logged in, you will now be able to access pricing and other details for the service center that you work with.	Log In Already a registered user? Log in below. Email*		
		LOG IN Forgot Password >		
3.	Your top header will now have changed. Click on " Account " to confirm important details related to your account. You will also see the service center that you are logged in with.			
	📀 Swagelok Southeast Texas 🗸 🌐 English 🗸 🗖 Acco	ount 🗸		
4.	Once you click " Account ", select " Account Dashboard " to review impor details about your account (Shipping, Billing, Favorites, etc.)	tant English Velcome Deb Account Dashboard My Orders My Quotes Saved Carts Log Out		

5.	If you want to review your orders, select "My Orders" .	Orders		
	Within "My Orders" you can Account Profile find orders by Purchase Order, Orders Sales Order, or System / E- Quotes commerce generated #. Saved Carts My Favorites My Favorites	Search Orders		
		Search by PO #, Sales Order #, or System Order #		
	For our customers, you will be able to access only your e- commerce orders for our	Colore and the room of the second sec		
	service center. If you place orders with other service centers, you will need to select	5 Orders 50 # Sales Order # System Order Ø Order Date Order Status		
	the service center when you login.			
6.	If you want to review your quotes, select "My Quotes". Quotes			
	Within "My Quotes" you can find orders by Part #, Reference #, Sales Quote #, or System / E-commerce generated #.	Search Quotes		
		Search By Part #, Reference #, Sales Quote #, or System Quote #		
	For our customers, you will be able to access only your e-commerce quotes for our service center. If you place quotes with	Q20/06/2021 05/07/2021 Date range limited to 90 days		
	other service centers, you will need to select the service center when you login.	SEARCH RESET		
		2 Quotes Reference # Sales Quote # System Quote # Creation Date Expiration Date Quote Status		
7.	If you want to review saved carts from paused transactions, select "Saved Carts".	Saved Carts		
	Customers can email or delete carts on this page.	1 Saved Cart Sort By Date Saved Latest 🗸		
	In order to activate a saved cart, select the cart.	Cart Name Cart Description Date Saved Action Cart 1357 - May 7, 2021, 2:47 PM Email Delete		
	Select "Add to Active Cart"			
	If you want to use this cart again in the future, select "Keep Saved Account"			
		Keep saved cart		
		Email Cart Delete Cart ADD TO ACTIVE CART		

8.	To review items that you have favorited, select " My Favorites ".	My Favorites
	Customers can use " My Favorites " to save regularly purchased items from Swagelok. This can speed up your time creating transactions when buying from Swagelok. To access parts, select the name of your Favorites list.	CREATE NEW LIS Sort By Last Modified Latest List Name Last Modified Action Regular Purchased from Swagelok 05/07/2021 Share Delete
9.	To upload your customer part number references. Select " Customer Part Numbers ". Download the Template and upload th file. The service center will review and approve the template, and then it will t accessible to you.	Add Customer Part Numbers to Your Account he Enter Swagelok part numbers and assign your own customized part numbers. Please download and use the below template to ensure an accurate import.
10.	"Address Book" will show all addresses that the service center has on file for your account. If you need to add a new address, that can be done in the check-out process. Address Book Shipping Address	
11.	To logout, select "Log Out".	