

# QUICK REFERENCE GUIDE



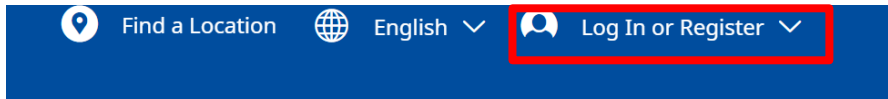
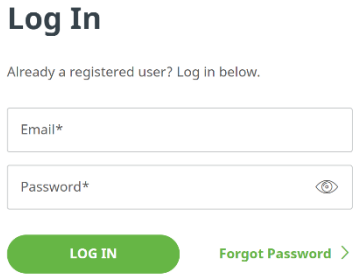
## PLACING A QUOTE AND ORDER

**Purpose:** This document is to be used by registered customers in setting up their account in our new, e-Commerce platform.


### NEW DOMAIN

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

### LOGGING IN AS A REGISTERED USER

1.	Click on <b>“Log in or Register”</b> in the top right corner of the page. 
2.	Your login will have changed since you last logged in. Instead of a username, please use the email associated with the account. Your password will not have changed. Username: Email Password: Past e-Commerce Login PW <i>If you have forgotten your password, follow the “Forgot Password” link and instructions.</i> 
3.	Once logged in, you will now be able to access pricing and other details for the service center that you work with.
4.	Now, we will begin to add items to the order. There are three different ways to find and add items to an order. <ol style="list-style-type: none"><li>1. Navigating the shop products page.</li><li>2. Using the Search Bar.</li><li>3. Adding items via the Quick Cart.</li></ol>

### CREATING A QUOTE OR ORDER

1.	There are several ways to navigate to search for an order. If you ever need assistance in finding a part, please contact your local Swagelok Service Center and their technical team can help. <ol style="list-style-type: none"><li>1. Using the <b>“Shop Products”</b> icon</li><li>2. Using the Search Bar</li><li>3. Using the <b>“Quick Order”</b></li></ol> 
2.	Using the <b>“Shop Products”</b> function is best for those who are looking for a product that they do not know the name, but understand how the product works and/or is designed.

3. Select **“Shop Products”** and review the Categories from the drop down. They are organized by our most popular products.

1. Fittings
2. Valves
3. Regulators
4. Hoses and Flexible Tubing
5. Filters
6. Sample Cylinders
7. Welding System
8. Leak Detectors, Lubricants, and Sealants
9. Tubing and Tube Accessories
10. Analytical Instrumentation
11. Measurement Devices

As you mouse over the product options, you will see sub-categories, listed in alphabetical order.

Users can select either a category or sub-category to search for a product.

The screenshot shows the 'SHOP PRODUCTS' page with a search bar at the top right containing the text 'What can we help you find?'. Below the search bar is a list of product categories under the heading 'SHOP PRODUCTS'. The categories are organized into two columns: 'Fittings' and 'Assembly-by-Torque Fittings (AbT)'. The 'Fittings' column includes: Valves, Regulators, Hoses and Flexible Tubing, Filters, Sample Cylinders, Welding System, Leak Detectors, Lubricants, and Sealants, Tubing and Tube Accessories, Analytical Instrumentation, and Measurement Devices. The 'Assembly-by-Torque Fittings (AbT)' column includes: Cone and Thread Fittings, Dielectric Fittings, Flange Adapters, Medium-Pressure Tube Fittings, PFA Fine Thread Flare Fittings, Pipe Fittings, Sanitary Fittings, Snubber Fittings, Tube Fittings and Adapters, Ultra-Torr Vacuum Fittings, VCO® O-Ring Face Seal Fittings, VCR® Metal Gasket Face Seal Fittings, and Weld Fittings. A 'View All Products >' link is located at the bottom of the 'Fittings' column.

4. Once you have **selected a sub category**, you can begin to use the filters on the left hand side of the navigation to narrow down results of a product.

Those filters include:

1. Body Material (i.e. Stainless, Brass, etc.)
2. Connection Size (1/4", 1/16", etc.)
3. Connection Type (Male or Female)
4. Cleaning Process (Standard or Special)
5. Feature (Positionable, Shape, etc.)
6. Coatings
7. Lubricant

You can add or takeaway filters, and the product will update on the left hand side in real time.

## Tube Fittings and Adapters-Male Connectors

Your local authorized Swagelok sales and service center may have additional options.


[+ Contact Us](#)

The screenshot shows the product page for 'Tube Fittings and Adapters-Male Connectors'. On the left side, there is a 'Filter By:' section with a list of filter categories, each with a plus sign to expand it: BODY MATERIAL, CONNECTION 1 SIZE, CONNECTION 1 TYPE, CONNECTION 2 SIZE, CONNECTION 2 TYPE, CONNECTION 3 SIZE, CONNECTION 3 TYPE, CLEANING PROCESS, FEATURE, BORED THROUGH, PLATINGS/COATINGS, and LUBRICANT. On the right side, there is a 'Sort By:' dropdown menu set to 'Relevance'. Below the filters, there is a product image of a male connector. To the right of the image is the text 'Tube Fittings and Adapters — M'. Below the image is a table with the following columns: Part #, Body Material, Connection 1 Size, and Connection 1 Type. The table contains two rows of data:

Part #	Body Material	Connection 1 Size	Connection 1 Type
+ 55-1210-5-12	316 Stainless Steel	3/4 in.	Swagelok® Tube Fitting
+ 55-1610-5-16	316 Stainless Steel	1 in.	Swagelok® Tube Fitting

5. Once you have found your product, select the +, and add the product to cart.

**Note: You must be logged in to view pricing.**



[+ View CAD](#)

— SS-810-5-8    316 Stainless Steel    1/2 in.    Swagelok® Tube Fitting    1/2 in.    Male NPT

**Stainless Steel Swagelok Tube Fitting, 45° Male Elbow, 1/2 in. Tube OD x 1/2 in. Male NPT**

Part # SS-810-5-8

[Log in or Register](#) to view price

—  + [ADD TO CART](#)

**Warning:** Do not mix/interchange Swagelok products or components not governed by industrial design standards, including Swagelok tube fitting end connections, with those of other manufacturers.

6. Next, we will use the Search Bar to navigate to find a product. You can use the Search Bar to find products by attribute or part number. Simply key in the part number or description and press search.


[SHOP PRODUCTS](#) ▾

ss-100|

7. Once you have found the product, select the + and add the product to cart.

Other features on this page:

1. Mail – You can email a part to yourself or another member of your team.
2. Add to Favorites- If this is a common part you purchase often, you can add to favorites as a quick reference.



**Stainless Steel Swagelok Tube Fitting, Male Elbow, 1/16 in. Tube OD x 1/8 in. Male NPT**

Part #: SS-100-2-2



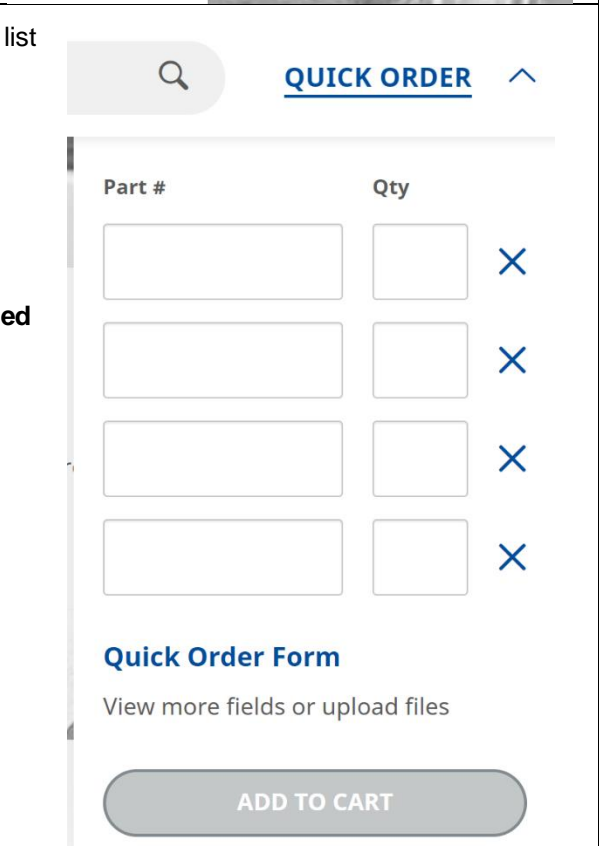
[Log in or Register](#) to view price

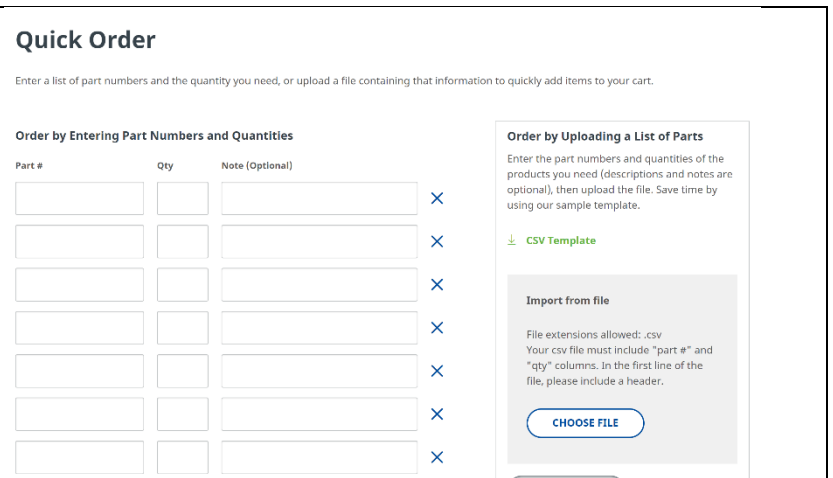
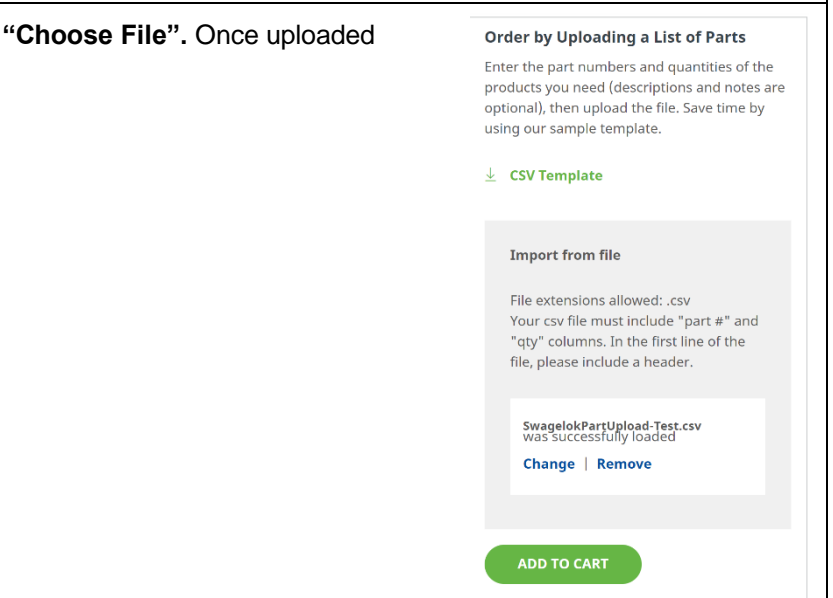
—  +

[ADD TO CART](#)    [ADD TO FAVORITES](#)

[Clear All](#) >

**BODY MATERIAL**


<p>8.</p>	<p>The last way to find an item is by using the <b>“Quick Order” Cart</b>. There are three different ways to use the Quick Order Cart. The Quick Cart is best used for adding parts quickly to an order – and ones that you are certain of the part number.</p> <ol style="list-style-type: none"> <li>1. The Short List Table</li> <li>2. The Long List Table / Quick Order Form</li> <li>3. Or the CSV</li> </ol> <p><b>Tip! Looking for a part and can’t find it in the catalog? Adding the part number in the quick cart is one way to add to a e-commerce quote.</b></p>	 
<p>9.</p>	<p>The first way to order via the <b>“Quick Order”</b> is to use the short list table.</p> <p>First, click on the <b>“Quick Order”</b> drop down. Then,</p> <ol style="list-style-type: none"> <li>1. Add in the Part Number</li> <li>2. Add the Quantity</li> <li>3. Select <b>“Add to Cart”</b></li> </ol> <p><b>Tip! If you click out of the quick order section and are logged in, your part #s will save in the quick order table.</b></p>	
<p>10.</p>	<p>The second way to order is using the <b>“Quick Order Form”</b>. Select <b>“Quick Order”</b>, then select <b>“Quick Order Form”</b>. This will expand the number of items that can be added to the table.</p>	

	<p>Once opened,</p> <ol style="list-style-type: none"> <li>1. Add in the Part Number</li> <li>2. Add in the Quantity</li> <li>3. Select <b>“Add to Cart”</b></li> </ol>	
11.	<p>The last way is to download and use the CSV Template. Select <b>“Quick Order”</b>, then select <b>“Quick Order Form”</b>. In the right hand corner, download the CSV Template.</p>	
12.	<p>Once complete, upload the file by selecting <b>“Choose File”</b>. Once uploaded select <b>“Add to Cart”</b>.</p>	





**COMPLETING THE TRANSACTION – QUOTE**

**Note: Customers will not be able to submit an order for items that do not have prices. Customers will only be able to submit quotes for those types of orders. A Swagelok Customer Service Representative will return the quote to the customer with pricing for approval!**


1.	<p>When ready to complete a quote, select <b>“View Cart”</b> or hit the Cart icon.</p> <p>If you want to submit as an order, skip down to the instructions, <b>“COMPLETING THE TRANSACTION – ORDER”</b></p>
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2.	Select "Get a Quote" and the quote will be submitted to the Service Center.	
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3.	<p>Complete:</p> <ol style="list-style-type: none"> <li>1. Shipping Details</li> <li>2. Shipping Method</li> <li>3. Requested Delivery Date – (i.e. when do you need it?)</li> <li>4. Quote Reference # (if this is related to a job or project)</li> <li>5. Quote Notes (i.e. special handling, packaging, etc.)</li> </ol> <p>Select "<b>Submit Quote Request</b>".</p>	<p><b>Quote Request</b></p> <p>Enter New Shipping Address</p> <table border="1"> <tr> <td>First Name*</td> <td>Last Name*</td> </tr> <tr> <td colspan="2">Address 1*</td> </tr> <tr> <td colspan="2">Address 2</td> </tr> <tr> <td colspan="2">COUNTRY* Please select</td> </tr> <tr> <td>City*</td> <td>State/Province</td> </tr> <tr> <td>Postal/Zip Code*</td> <td>Phone</td> </tr> </table> <p><input type="checkbox"/> Request to save Shipping Address</p> <p><small>Please allow 7-10 business days for processing a saved address</small></p>	First Name*	Last Name*	Address 1*		Address 2		COUNTRY* Please select		City*	State/Province	Postal/Zip Code*	Phone
First Name*	Last Name*													
Address 1*														
Address 2														
COUNTRY* Please select														
City*	State/Province													
Postal/Zip Code*	Phone													

4.	<p>Once submitted, you will receive a quote confirmation.</p> <hr/> <h2 style="text-align: center;">Thank You For Requesting a Quote!</h2> <p>Your Temporary Quote Number: <b>0000039079</b></p> <p>You will receive a follow-up from your local sales and service center with updated quote information.</p> <p><b>If you have any question regarding your quote, please contact us.</b></p> <p>YOUR LOCAL SALES &amp; SERVICE CENTER</p> <p><b>Swagelok Southeast Texas</b></p> <p> 10110 Fairbanks N Houston Rd Houston, TX 77064</p> <p> 713-527-0233</p> <p> <a href="mailto:info@sch.swagelok.com">info@sch.swagelok.com</a></p> <p> <a href="https://www.southeasttexas.swagelok.solutions">https://www.southeasttexas.swagelok.solutions</a></p>	
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**COMPLETING THE TRANSACTION – ORDER**

1.	When ready to complete an order, select " <b>View Cart</b> " or hit the Cart icon.	
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2.	<p>Select <b>“Check Out”</b> from the homepage.</p> <div style="text-align: right;"> <h2>Shopping Cart</h2> <p> <a href="#">Continue Shopping &gt;</a> <span style="margin-left: 100px;"><a href="#">GET A QUOTE</a></span> <span style="margin-left: 50px;"><a href="#">CHECKOUT</a></span> </p> <p><a href="#">Save Cart &gt;</a></p> </div>																								
3.	<div style="display: flex;"> <div style="flex: 1;"> <p>Complete:</p> <ol style="list-style-type: none"> <li>1. Shipping Details</li> <li>2. Shipping Method</li> <li>3. Requested Delivery Date – (i.e. when do you need it?)</li> <li>4. Payment and Billing Information (Credit Card or Purchase Order)</li> <li>5. Final Review</li> </ol> <p><b><i>Tip: Please include any shipping details or additional requests that you should need to help deliver your customer correctly.</i></b></p> </div> <div style="flex: 2;"> <h3 style="text-align: center;">Checkout <span style="float: right;">🔒 Secure Checkout</span></h3> <div style="display: flex;"> <div style="flex: 1; border: 1px solid #ccc; padding: 5px;"> <p style="background-color: #0056b3; color: white; padding: 2px;">Shipping Address</p> <p style="font-size: small; margin-top: 5px;">Enter New Shipping Address</p> <p>Company*</p> <p>Address 1*</p> <p>Address 2</p> <p>COUNTRY* Please select</p> <p>City*      State/Province</p> <p>Postal/Zip Code*      Phone</p> </div> <div style="flex: 1; border: 1px solid #ccc; padding: 5px; margin-left: 10px;"> <p style="background-color: #808080; color: white; padding: 2px;">Order Summary</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center;"></td> <td style="font-size: small;">Stainless Steel Swagelok Tube Fitting, Male Elbow, 1/16 in. Tube OD x 1/16 in. Male NPT Part #: SS-100-2-1</td> <td style="text-align: right; font-size: small;">\$27.67</td> </tr> <tr> <td colspan="2" style="text-align: center;">Qty: 1</td> <td></td> </tr> <tr> <td colspan="3" style="border-top: 1px solid #ccc; height: 10px;"></td> </tr> <tr> <td style="text-align: center;"></td> <td style="font-size: small;">Stainless Steel Swagelok Tube Fitting, Male Connector, 1/16 in. Tube OD x 1/8 in. Male NPT Part #: SS-100-1-2</td> <td style="text-align: right; font-size: small;">\$12.73</td> </tr> <tr> <td colspan="2" style="text-align: center;">Qty: 1</td> <td></td> </tr> <tr> <td colspan="2" style="border-top: 1px solid #ccc; height: 10px;"></td> <td></td> </tr> <tr> <td colspan="2" style="font-size: small;">Subtotal:</td> <td style="text-align: right; font-size: small;">\$40.40</td> </tr> <tr> <td colspan="2" style="font-size: x-small;">Tax:</td> <td style="text-align: right; font-size: x-small;"><i>Calculated at Payment &amp; Billing Address</i></td> </tr> </table> </div> </div> </div> </div>		Stainless Steel Swagelok Tube Fitting, Male Elbow, 1/16 in. Tube OD x 1/16 in. Male NPT Part #: SS-100-2-1	\$27.67	Qty: 1							Stainless Steel Swagelok Tube Fitting, Male Connector, 1/16 in. Tube OD x 1/8 in. Male NPT Part #: SS-100-1-2	\$12.73	Qty: 1						Subtotal:		\$40.40	Tax:		<i>Calculated at Payment &amp; Billing Address</i>
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Subtotal:		\$40.40																							
Tax:		<i>Calculated at Payment &amp; Billing Address</i>																							
4.	<p>Once you review and complete your order details, select <b>“Place Order”</b></p> <div style="text-align: center; margin-top: 20px;"> <span style="background-color: #00a651; color: white; padding: 10px 30px; border-radius: 15px; font-weight: bold; font-size: 1.2em;">PLACE ORDER</span> </div>																								
5.	<p>You will then arrive at the order confirmation page. Our Customer Service team will review the order and update you on when your product will arrive based on stock availability.</p> <h2 style="margin-top: 20px;">Thank You For Your Order!</h2> <p>Your Temporary Order Number: <a href="#">0000039082</a></p> <p style="font-size: small;">You will receive an email copy of your order confirmation. You will also receive a follow-up shortly from your local sales and service center with updated order information.</p> <p style="font-size: small;">If you have any question regarding your quote, please contact us.</p>																								