## QUICK REFERENCE GUIDE



## USING THE ACCOUNT DASHBOARD

Purpose: This document is to be used by new, Swagelok London 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 the 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 Arready a registered user? Log in below. Email* Password*			
3.	Your top header will now have changed. Click on " <b>Account</b> " to confirm important details related to your account. You will also see the service center that you are logged in with.				
	📀 Swagelok London 🗸 🌐 English 🗸 🗖 Account 🕚	×			
4.	Once you click " <b>Account</b> ", select " <b>Account Dashboard</b> " to review impor details about your account (Shipping, Billing, Favorites, etc.)	tant English V Account Account DoLE Velcome Deb Account Dashboard My Orders ORD Ny Quotes Saved Carts Log Out			

5.	If you want to review your orders, select <b>"My Orders"</b> .	t Dashboard	Orders		
	Within "My Orders" you canAccount Profilefind orders by Purchase Order, Sales Order, or System / E-Orders		Search Orders		
	Commerce generated #. For our customers, you will be able to access only your e- commerce orders for our service center. If you place orders with other service		Search by PO #, Sales Order #, or System Order #		
		Part Numbers	02/06/2021 05/07/2021 III Date range limited to 90 days SEARCH RESET		
	centers, you will need to select the service center when you login.		5 Orders PO # Sales Order # System Order # Order Date Order Status		
6.	If you want to review your quotes, select "My Quotes". Quotes				
	Within <b>"My Quotes"</b> you can find orders by Part #, Reference #, Sales Quote #, or System / E-commerce generated #. For our customers, you will be able to access only your e-commerce quotes for our service center. If you place quotes with other service centers, you will need to select the service center when you login.		earch Quotes		
			Search By Part #, Reference #, Sales Quote #, or System Quote #          Quote DATE FROM       QUOTE DATE TO         02/06/2021       05/07/2021         Date range limited to 90 days		
			Quotes leference # Sales Quote # System Quote # Creation Date Expiration Date Quote Status		
7.	If you want to review saved carts from paused transactions, select " <b>Saved Car</b>	ts".	Saved Carts		
	Customers can email or delete carts on t page.		1 Saved Cart Sort By Date Saved Latest 🗸		
	In order to activate a saved cart, select to cart.	ne	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 fuse select " <b>Keep Saved Account</b> "	uture,			
			Keep saved cart		
			Email Cart   Delete Cart ADD TO ACTIVE CART		

8.	To review items that you have favorited, select " <b>My Favorites".</b>	My Favorites	
	Customers can use " <b>My</b> <b>Favorites</b> " 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 LIST         Sort By       Last Modified Latest v         List Name       Last Modified       Action         Regular Purchased from Swagelok       05/07/2021       Share   Delete	
9.	To upload your customer part number references. Select " <b>Customer Part</b> <b>Numbers</b> ". 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 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 " <b>Log Out".</b>		