

QUICK REFERENCE GUIDE



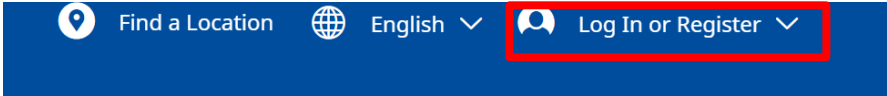
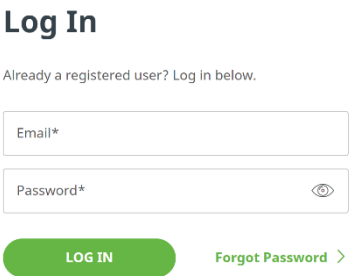
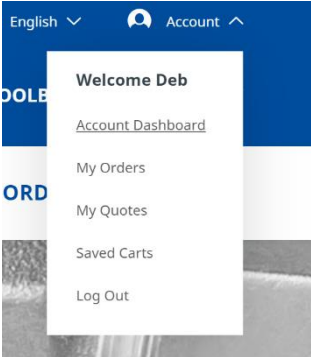
USING THE ACCOUNT DASHBOARD

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 the page. Select Login. 
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. 
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. 
4.	Once you click “Account”, select “Account Dashboard” to review important details about your account (Shipping, Billing, Favorites, etc.) 

5.	If you want to review your orders, select “My Orders”. Within “My Orders” you can find orders by Purchase Order, Sales Order, or System / E-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 centers, you will need to select the service center when you login.	Account Dashboard Account Profile Orders Quotes Saved Carts My Favorites Customer Part Numbers Address Book Log Out Orders Search Orders Search by PO #, Sales Order #, or System Order # ORDER DATE FROM 02/06/2021 ORDER DATE TO 05/07/2021 Date range limited to 90 days SEARCH RESET 5 Orders <table><tr><th>PO #</th><th>Sales Order #</th><th>System Order #</th><th>Order Date</th><th>Order Status</th></tr><tr><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table>	PO #	Sales Order #	System Order #	Order Date	Order Status							
PO #	Sales Order #	System Order #	Order Date	Order Status										
6.	If you want to review your quotes, select “My Quotes”. Within “My Quotes” 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.	Quotes Search Quotes Search By Part #, Reference #, Sales Quote #, or System Quote # QUOTE DATE FROM 02/06/2021 QUOTE DATE TO 05/07/2021 Date range limited to 90 days SEARCH RESET 2 Quotes <table><tr><th>Reference #</th><th>Sales Quote #</th><th>System Quote #</th><th>Creation Date</th><th>Expiration Date</th><th>Quote Status</th></tr><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table>	Reference #	Sales Quote #	System Quote #	Creation Date	Expiration Date	Quote Status						
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”. Customers can email or delete carts on this page. In order to activate a saved cart, select the cart. Select “Add to Active Cart” If you want to use this cart again in the future, select “Keep Saved Account”	Saved Carts 1 Saved Cart Sort By Date Saved Latest <table><tr><th>Cart Name</th><th>Cart Description</th><th>Date Saved</th><th>Action</th></tr><tr><td>Cart 1357</td><td>-</td><td>May 7, 2021, 2:47 PM</td><td>Email Delete</td></tr></table> ☐ Keep saved cart Email Cart Delete Cart ADD TO ACTIVE CART	Cart Name	Cart Description	Date Saved	Action	Cart 1357	-	May 7, 2021, 2:47 PM	Email Delete				
Cart Name	Cart Description	Date Saved	Action											
Cart 1357	-	May 7, 2021, 2:47 PM	Email Delete											

8.	To review items that you have favorited, select “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.	My Favorites CREATE NEW LIST Sort By Last Modified Latest ▾ <table> <tr> <th>List Name</th><th>Last Modified</th><th>Action</th></tr> <tr> <td>Regular Purchased from Swagelok</td><td>05/07/2021</td><td>Share Delete</td></tr> </table>	List Name	Last Modified	Action	Regular Purchased from Swagelok	05/07/2021	Share Delete
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 the file. The service center will review and approve the template, and then it will be accessible to you.	Customer Part Numbers 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. Download Template Upload Parts from File File extensions allowed: .csv Note: Please allow 7-10 business days for customer part numbers to be added to your account. CHOOSE FILE						
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”.							