

QUICK REFERENCE GUIDE



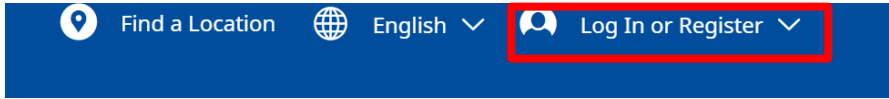
LOGGING INTO E-COMMERCE – NEW USER

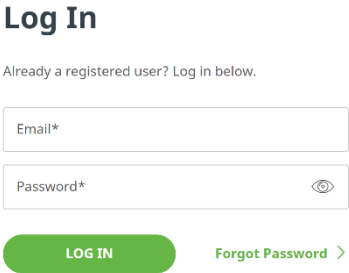
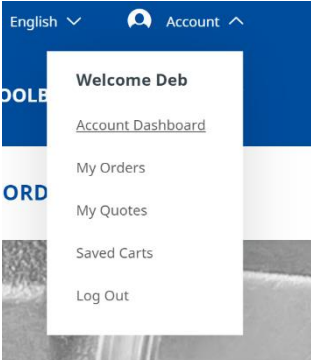
Purpose: This document is to be used by new customers in setting up their account in our new e-Commerce platform.

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 “Log in or Register” in the top right corner of the page. 						
2.	Click “Register” and you will open the register page. Register We encourage you to take full advantage of our website by registering. Anyone can register, and completing the entire registration form will allow you to view pricing, order online, request quotes, store favorite products, assign customized part numbers, and save or forward your shopping cart. Complete the 6 sections of information and select “Register” 1. Professional Information 2. Industry 3. Location 4. Select Your Sales and Service Center 5. Account information a. Use your email that you would like all customer communication to come to. b. Select a password 6. Accept our Site policies + RECAPTCHA Professional Information (1 of 6) <table><tr><td>First Name*</td><td>Last Name*</td></tr><tr><td>Phone*</td><td>Company*</td></tr><tr><td>COMPANY TYPE* Please select</td><td>JOB TYPE* Please select</td></tr></table>	First Name*	Last Name*	Phone*	Company*	COMPANY TYPE* Please select	JOB TYPE* Please select
First Name*	Last Name*						
Phone*	Company*						
COMPANY TYPE* Please select	JOB TYPE* Please select						
3.	Once submitted, you will receive an email verification to complete. Please confirm your account by clicking this link: https://products.staging.swagelok.com/en/register/confirm?token=Z9EPTJN1srhkf2BNvo74ZX7D3vVv84ldGM438CHexZxSE%2Bgam084w3kheQh8HmpOkz8027FKwE6gAkVN9SYNrkPaPjtCYaBZbC8a%2BhkofJb ~~~~~ Thank you for visiting swagelok.com and registering with Swagelok Southeast Texas, an authorized Swagelok sales and service center, As a registered user, you may: • View product pricing and make purchases online through your selected sales and service center's online storefront • Obtain quote and order status updates • View your online purchasing history • Assign customized part numbers to Swagelok products You also have access to all the other information and functionality available on swagelok.com including: • The latest product information, including catalogs, technical papers, and thousands of CAD templates, available in a variety of • A comprehensive services section that outlines all the ways in which local experts can help you maintain system health, increase • A toolbox of resources to help you better design and choose components for your fluid systems, including calculators, a flow cui • Swagelok Reference Point, our blog for industrial professionals, updated weekly with expert insights and success stories intend If you would like to make changes to your user profile information, log into swagelok.com and navigate to Account > Account Dashboard Meanwhile, visit swagelok.com frequently for the latest information on products, services, and resources. You can also stay up to date by • LinkedIn • YouTube • Facebook • Twitter Thank you, Swagelok						

4.	Confirm your account by clicking the link. It will direct you to the Swagelok website to login.	
5.	Enter your login information you just completed. Once logged in, you will now be able to access pricing and other details for the service center that you work with.	 The image shows the 'Log In' page on the Swagelok website. It includes a heading 'Log In', a subtext 'Already a registered user? Log in below.', and two input fields for 'Email*' and 'Password*'. Below the fields are a green 'LOG IN' button and a link 'Forgot Password >'.
6.	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.	 The image shows a portion of the Swagelok website's top header. It features a globe icon, the text 'English' with a dropdown arrow, and a blue button with a person icon and the text 'Account' with a dropdown arrow. The 'Account' button is highlighted with a red rectangle.
7.	Once you click “Account”, select “Account Dashboard” to review important details about your account (Shipping, Billing, Favorites, etc.) If you want to review your orders, select “My Orders”. If you want to review your quotes, select “My Quotes”. If you want to review saved carts from paused or past transactions, select “Saved Carts”. To logout, select “Log Out”.	 The image shows the dropdown menu that appears after clicking the 'Account' button. It displays 'Welcome Deb' at the top, followed by a list of options: 'Account Dashboard' (underlined), 'My Orders', 'My Quotes', 'Saved Carts', and 'Log Out'.
8.	If everything is correct, you are now logged in and ready to order from your local Swagelok Sales and Service Center.	

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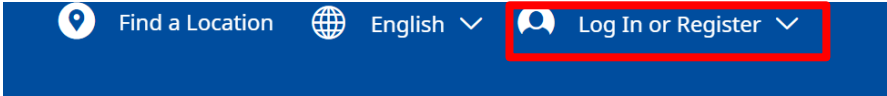
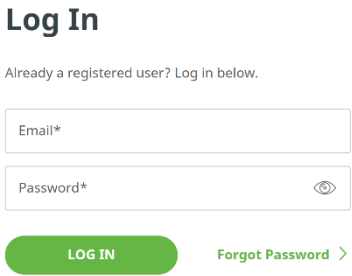
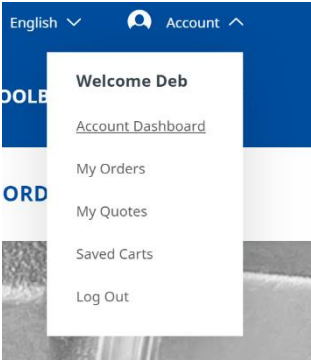
LOGGING INTO E-COMMERCE – REGISTERED USER

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

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LOGGING IN AS A REGISTERED USER

1.	Click on “Log in or Register” 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.	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. 
5.	Once you click “Account”, select “Account Dashboard” to review important details about your account (Shipping, Billing, Favorites, etc.) If you want to review your orders, select “My Orders”. If you want to review your quotes, select “My Quotes”. If you want to review saved carts from paused or past transactions, select “Saved Carts”. To logout, select “Log Out”. 
6.	If everything is correct, you are now logged in and ready to order from your local Sales and Service Center.

QUICK REFERENCE GUIDE



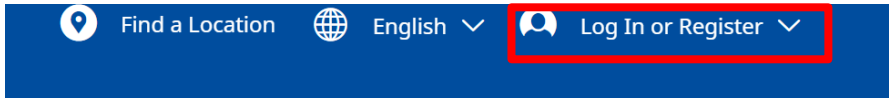
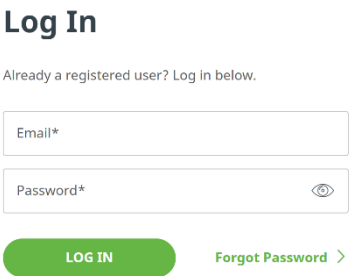
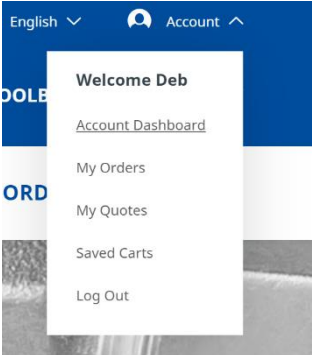
USING THE ACCOUNT DASHBOARD

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

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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

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

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

Cart Name

Cart Description

Date Saved

Action

Cart 1357

-

May 7, 2021, 2:47 PM

Email

Delete

Keep saved cart

Email Cart

Delete Cart

Add to Active Cart

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><thead><tr><th>List Name</th><th>Last Modified</th><th>Action</th></tr></thead><tbody><tr><td>Regular Purchased from Swagelok</td><td>05/07/2021</td><td>Share Delete</td></tr></tbody></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”.						

QUICK REFERENCE GUIDE



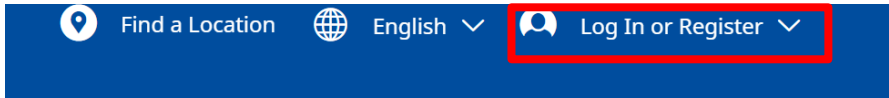
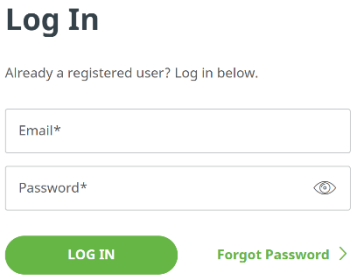
PLACING A QUOTE AND ORDER

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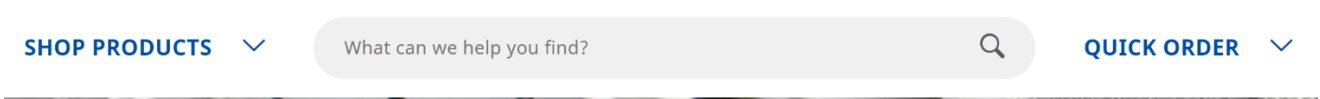
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2.	Your login will have changed since you last logged in. Instead of a username, please use the email associated with the account. Your password will not have changed. Username: Email Password: Past e-Commerce Login PW <i>If you have forgotten your 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. 1. Navigating the shop products page. 2. Using the Search Bar. 3. Adding items via the Quick Cart.

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. 1. Using the “Shop Products” icon 2. Using the Search Bar 3. Using the “Quick Order” 
2.	Using the “Shop Products” 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.

SHOP PRODUCTS

What can we help you find?

Fittings

Valves

Regulators

Hoses and Flexible Tubing

Filters

Sample Cylinders

Welding System

Leak Detectors, Lubricants, and Sealants

Tubing and Tube Accessories

Analytical Instrumentation

Measurement Devices

View All Products

Assembly-by-Torque Fittings (AbT)

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

Weld Fittings

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

Filter By:

+ 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

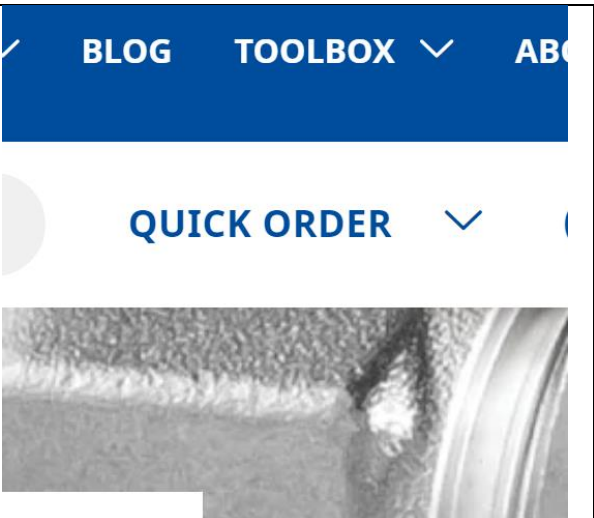
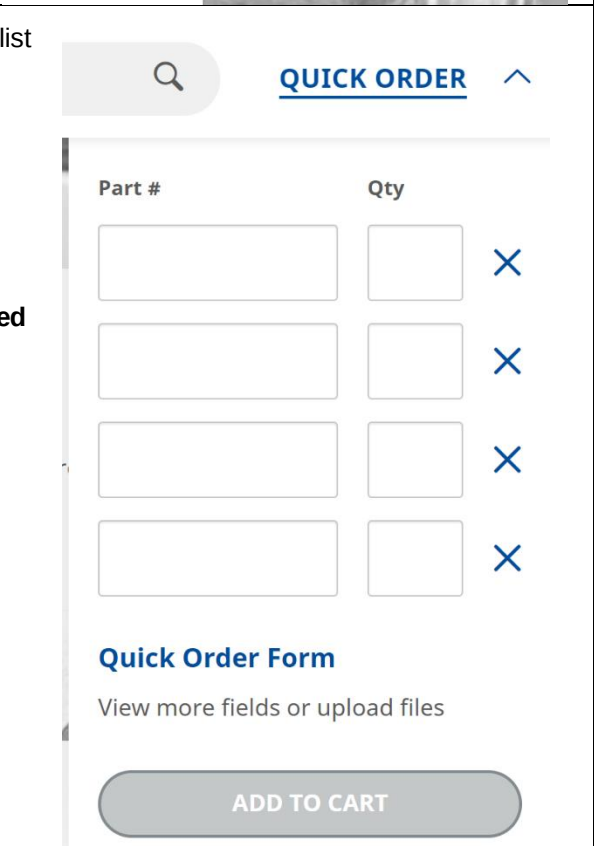
+ LUBRICANT

Sort By: Relevance

Tube Fittings and Adapters — N

Part #	Body Material	Connection 1 Size	Connection 1 Type
+ S5-1210-5-12	316 Stainless Steel	3/4 in.	Swagelok® Tube Fitting
+ S5-1610-5-16	316 Stainless Steel	1 in.	Swagelok® Tube Fitting

5.	Once you have found your product, select the +, and add the product to cart. <u>Note: You must be logged in to view pricing.</u>	SS-810-5-8 316 Stainless Steel 1/2 in. Swagelok® Tube Fitting 1/2 in. Male NPT  + View CAD 1 + ADD TO CART 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 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 1 + ADD TO CART ADD TO FAVORITES Clear All BODY MATERIAL ✉

8.	The last way to find an item is by using the “Quick Order” Cart. 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. 1. The Short List Table 2. The Long List Table / Quick Order Form 3. Or the CSV 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.	
9.	The first way to order via the “Quick Order” is to use the short list table. First, click on the “Quick Order” drop down. Then, 1. Add in the Part Number 2. Add the Quantity 3. Select “Add to Cart” Tip! If you click out of the quick order section and are logged in, your part #s will save in the quick order table.	
10.	The second way to order is using the “Quick Order Form”. Select “Quick Order”, then select “Quick Order Form”. This will expand the number of items that can be added to the table.	

	Once opened, 1. Add in the Part Number 2. Add in the Quantity 3. Select “Add to Cart” Quick Order Enter a list of part numbers and the quantity you need, or upload a file containing that information to quickly add items to your cart. Order by Entering Part Numbers and Quantities <table><thead><tr><th>Part #</th><th>Qty</th><th>Note (Optional)</th><th></th></tr></thead><tbody><tr><td> </td><td> </td><td> </td><td>×</td></tr><tr><td> </td><td> </td><td> </td><td>×</td></tr><tr><td> </td><td> </td><td> </td><td>×</td></tr><tr><td> </td><td> </td><td> </td><td>×</td></tr><tr><td> </td><td> </td><td> </td><td>×</td></tr><tr><td> </td><td> </td><td> </td><td>×</td></tr><tr><td> </td><td> </td><td> </td><td>×</td></tr></tbody></table> Order by Uploading a List of Parts Enter the part numbers and quantities of the products you need (descriptions and notes are optional), then upload the file. Save time by using our sample template. ↓ CSV Template Import from file File extensions allowed: .csv Your csv file must include "part #" and "qty" columns. In the first line of the file, please include a header. CHOOSE FILE	Part #	Qty	Note (Optional)					×				×				×				×				×				×				×
Part #	Qty	Note (Optional)																															
			×																														
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11.	The last way is to download and use the CSV Template. Select “Quick Order”, then select “Quick Order Form”. In the right hand corner, download the CSV Template.																																
12.	Once complete, upload the file by selecting “Choose File”. Once uploaded select “Add to Cart”. Order by Uploading a List of Parts Enter the part numbers and quantities of the products you need (descriptions and notes are optional), then upload the file. Save time by using our sample template. ↓ CSV Template Import from file File extensions allowed: .csv Your csv file must include "part #" and "qty" columns. In the first line of the file, please include a header. SwagelokPartUpload-Test.csv was successfully loaded Change Remove ADD TO CART																																

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.	When ready to complete a quote, select “View Cart” or hit the Cart icon. If you want to submit as an order, skip down to the instructions, “COMPLETING THE TRANSACTION – ORDER”
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2.	Select “Get a Quote” and the quote will be submitted to the Service Center. GET A QUOTE
3.	Complete: 1. Shipping Details 2. Shipping Method 3. Requested Delivery Date – (i.e. when do you need it?) 4. Quote Reference # (if this is related to a job or project) 5. Quote Notes (i.e. special handling, packaging, etc.) Select “Submit Quote Request”. Quote Request Enter New Shipping Address First Name* Last Name* Address 1* Address 2 COUNTRY* Please select City* State/Province Postal/Zip Code* Phone ☐ Request to save Shipping Address Please allow 7-10 business days for processing a saved address
4.	Once submitted, you will receive a quote confirmation. Thank You For Requesting a Quote! Your Temporary Quote Number: 0000039079 You will receive a follow-up from your local sales and service center with updated quote information. If you have any question regarding your quote, please contact us.

COMPLETING THE TRANSACTION – ORDER

1.	When ready to complete an order, select “View Cart” or hit the Cart icon. VIEW CART
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2.	Select “Check Out” from the homepage. Shopping Cart Continue Shopping > GET A QUOTE CHECKOUT Save Cart >
3.	Complete: - Shipping Details - Shipping Method - Requested Delivery Date – (i.e. when do you need it?) - Payment and Billing Information (Credit Card or Purchase Order) - Final Review Tip: Please include any shipping details or additional requests that you should need to help deliver your customer correctly. Checkout Secure Checkout Shipping Address Enter New Shipping Address Company* Address 1* Address 2 COUNTRY* Please select City* State/Province Postal/Zip Code* Phone Order Summary  Stainless Steel Swagelok Tube Fitting, Male Elbow, 1/16 in. Tube OD x 1/16 in. Male NPT Part #: SS-100-2-1 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 Qty: 1 Subtotal: \$40.40 Tax: Calculated at Domestic & Billing Address
4.	Once you review and complete your order details, select “Place Order” PLACE ORDER
5.	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. Thank You For Your Order! Your Temporary Order Number: 0000039082 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. If you have any question regarding your quote, please contact us.