

QUICK REFERENCE GUIDE



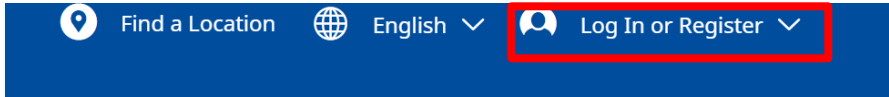
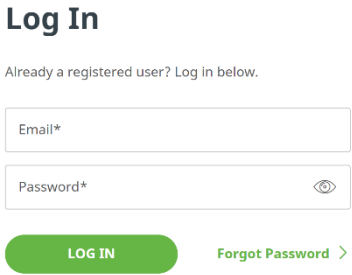
PLACING A QUOTE AND ORDER

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

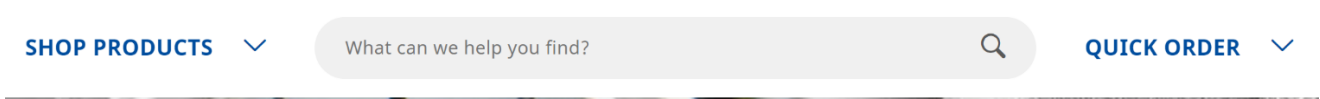
NEW DOMAIN

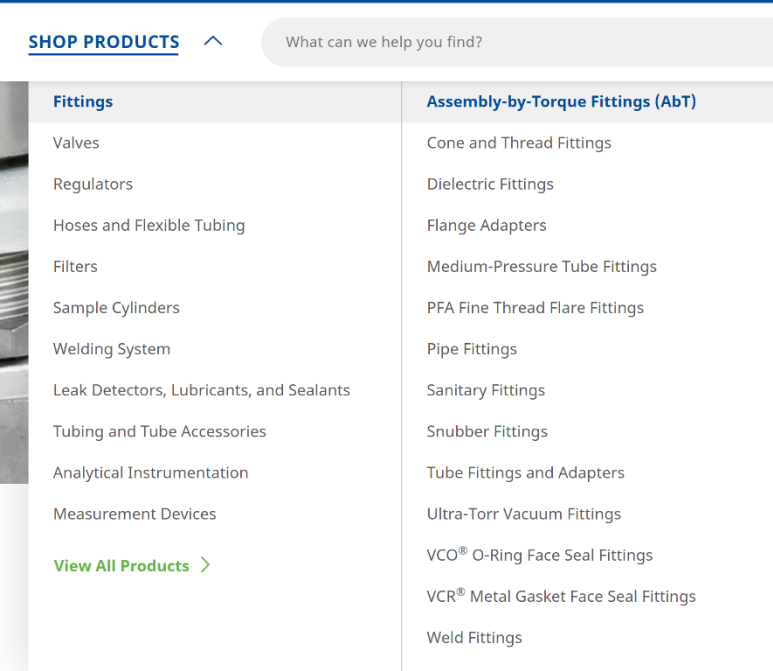
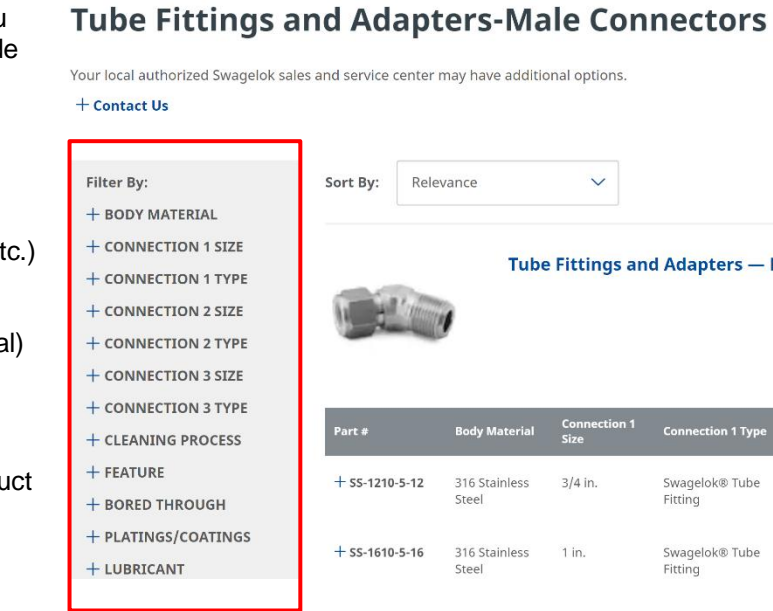
The Swagelok e-Commerce Site domain has changed to products.swagelok.com. Please update all bookmarks and favorites.





LOGGING IN AS A REGISTERED USER

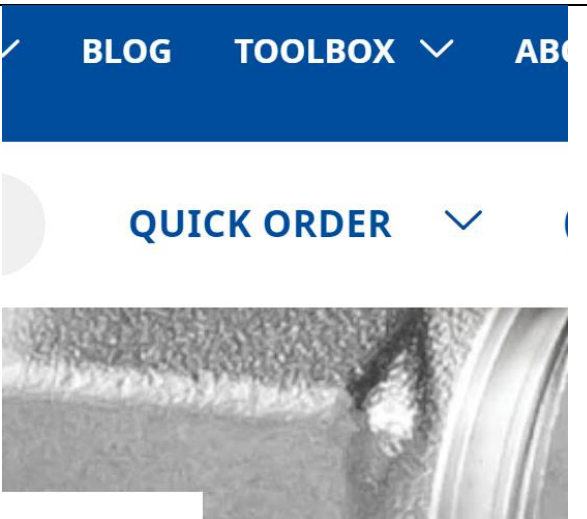
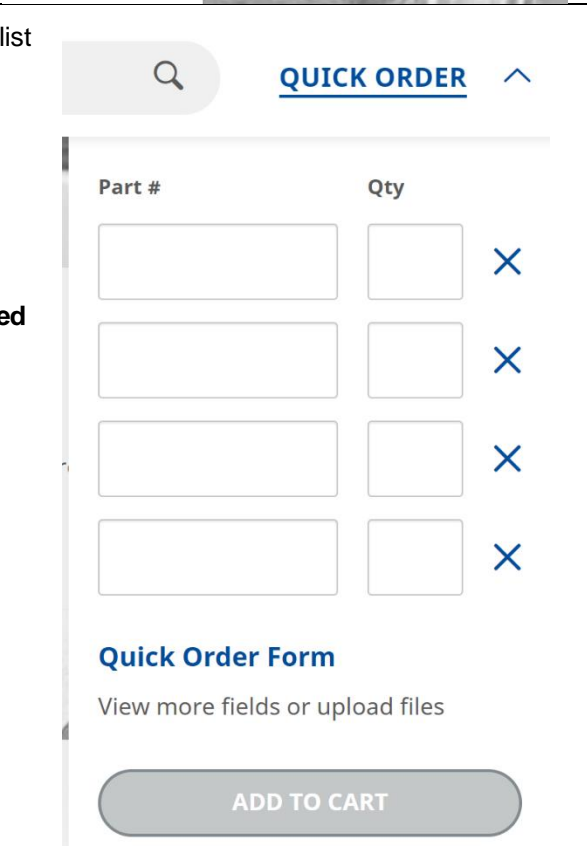
1.	<p>Click on “Log in or Register” in the top right corner of the page.</p> 
2.	<p>Your login will have changed since you last logged in. Instead of a username, please use the email associated with the account. Your password will not have changed.</p> <p>Username: Email Password: Past e-Commerce Login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

CREATING A QUOTE OR ORDER

1.	<p>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.</p> <ol style="list-style-type: none">1. Using the “Shop Products” icon2. Using the Search Bar3. Using the “Quick Order” 
2.	<p>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.</p>

<p>3.</p>	<p>Select “Shop Products” and review the Categories from the drop down. They are organized by our most popular products.</p> <ol style="list-style-type: none"> 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 <p>As you mouse over the product options, you will see sub-categories, listed in alphabetical order.</p> <p>Users can select either a category or sub-category to search for a product.</p>	
<p>4.</p>	<p>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.</p> <p>Those filters include:</p> <ol style="list-style-type: none"> 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 <p>You can add or takeaway filters, and the product will update on the left hand side in real time.</p>	

5.	<p>Once you have found your product, select the +, and add the product to cart.</p> <p><u>Note: You must be logged in to view pricing.</u></p> <div>  <p>Stainless Steel Swagelok Tube Fitting, 45° Male Elbow, 1/2 in. Tube OD x 1/2 in. Male NPT</p> <p>Part # SS-810-5-8</p> <p>Log in or Register to view price</p> <div> — <input type="text" value="1"/> + </div> <p>+ View CAD ADD TO CART</p> <p><small>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.</small></p> </div>
6.	<p>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.</p> <p>Simply key in the part number or description and press search.</p> <div> <p>SHOP PRODUCTS </p> <input type="text" value="ss-100"/>  </div>
7.	<p>Once you have found the product, select the + and add the product to cart.</p> <p>Other features on this page:</p> <ol style="list-style-type: none"> 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. <div> <p>Stainless Steel Swagelok Tube Fitting, Male Elbow, 1/16 in. Tube OD x 1/8 in. Male NPT</p> <p>Part #: SS-100-2-2</p> <p>Log in or Register to view price</p> <div> — <input type="text" value="1"/> + </div> <p>ADD TO CART ADD TO FAVORITES</p> <p>Clear All </p> <p>BODY MATERIAL</p> </div>

8.	<p>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.</p> <ol style="list-style-type: none"> 1. The Short List Table 2. The Long List Table / Quick Order Form 3. Or the CSV <p>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.</p>	
9.	<p>The first way to order via the “Quick Order” is to use the short list table.</p> <p>First, click on the “Quick Order” drop down. Then,</p> <ol style="list-style-type: none"> 1. Add in the Part Number 2. Add the Quantity 3. Select “Add to Cart” <p>Tip! If you click out of the quick order section and are logged in, your part #s will save in the quick order table.</p>	
10.	<p>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.</p>	

	<div><div>Once opened,</div><div><div>1. Add in the Part Number</div><div>2. Add in the Quantity</div><div>3. Select “Add to Cart”</div></div></div> <div><div><div>Quick Order</div><div>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.</div><div><div>Order by Entering Part Numbers and Quantities</div><table><thead><tr><th>Part #</th><th>Qty</th><th>Note (Optional)</th><th></th></tr></thead><tbody><tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td>×</td></tr><tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td>×</td></tr><tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td>×</td></tr><tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td>×</td></tr><tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td>×</td></tr><tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td>×</td></tr><tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td>×</td></tr></tbody></table></div><div><div>Order by Uploading a List of Parts</div><div>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.</div><div><div>↓ CSV Template</div><div><div>Import from file</div><div>File extensions allowed: .csv Your csv file must include "part #" and "qty" columns. In the first line of the file, please include a header.</div><div>CHOOSE FILE</div></div></div></div></div></div>	Part #	Qty	Note (Optional)		<input type="text"/>	<input type="text"/>	<input type="text"/>	×	<input type="text"/>	<input type="text"/>	<input type="text"/>	×	<input type="text"/>	<input type="text"/>	<input type="text"/>	×	<input type="text"/>	<input type="text"/>	<input type="text"/>	×	<input type="text"/>	<input type="text"/>	<input type="text"/>	×	<input type="text"/>	<input type="text"/>	<input type="text"/>	×	<input type="text"/>	<input type="text"/>	<input type="text"/>	×
Part #	Qty	Note (Optional)																															
<input type="text"/>	<input type="text"/>	<input type="text"/>	×																														
<input type="text"/>	<input type="text"/>	<input type="text"/>	×																														
<input type="text"/>	<input type="text"/>	<input type="text"/>	×																														
<input type="text"/>	<input type="text"/>	<input type="text"/>	×																														
<input type="text"/>	<input type="text"/>	<input type="text"/>	×																														
<input type="text"/>	<input type="text"/>	<input type="text"/>	×																														
<input type="text"/>	<input type="text"/>	<input type="text"/>	×																														
11.	<div>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.</div>																																
12.	<div>Once complete, upload the file by selecting “Choose File”. Once uploaded select “Add to Cart”.</div>	<div><div><div>Order by Uploading a List of Parts</div><div>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.</div><div><div>↓ CSV Template</div><div><div>Import from file</div><div>File extensions allowed: .csv Your csv file must include "part #" and "qty" columns. In the first line of the file, please include a header.</div><div><div>SwagelokPartUpload-Test.csv was successfully loaded</div><div>Change Remove</div></div></div></div><div>ADD TO CART</div></div></div>																															

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 “View Cart” or hit the Cart icon.</p> <p>If you want to submit as an order, skip down to the instructions, “COMPLETING THE TRANSACTION – ORDER”</p>
----	---

2.	<p>Select “Get a Quote” and the quote will be submitted to the Service Center.</p> <div data-bbox="915 197 1484 302"> <div>GET A QUOTE</div> </div>
3.	<p>Complete:</p> <ol style="list-style-type: none"> 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.) <p>Select “Submit Quote Request”.</p> <div data-bbox="1065 378 1451 806"> <h3>Quote Request</h3> <p>Enter New Shipping Address</p> <div> <input type="text"/> First Name* <input type="text"/> Last Name* </div> <div><input type="text"/> Address 1*</div> <div><input type="text"/> Address 2</div> <div> <input type="text"/> COUNTRY* <small>Please select</small> </div> <div> <input type="text"/> City* <input type="text"/> State/Province </div> <div> <input type="text"/> Postal/Zip Code* <input type="text"/> Phone </div> <div> <input type="checkbox"/> Request to save Shipping Address </div> <small>Please allow 7-10 business days for processing a saved address</small> </div>
4.	<p>Once submitted, you will receive a quote confirmation.</p> <div data-bbox="201 947 948 995"> <h2>Thank You For Requesting a Quote!</h2> </div> <p>Your Temporary Quote Number: 0000039079</p> <p>You will receive a follow-up from your local sales and service center with updated quote information.</p> <p>If you have any question regarding your quote, please contact us.</p> <div data-bbox="201 1205 558 1442"> <p><small>YOUR LOCAL SALES & SERVICE CENTER</small></p> <p>Swagelok Southeast Texas</p> <div> 10110 Fairbanks N Houston Rd Houston, TX 77064 </div> <div> 713-527-0233 </div> <div> info@sch.swagelok.com </div> <div> https://www.southeasttexas.swagelok.solutions </div> </div>

COMPLETING THE TRANSACTION – ORDER

1.	<p>When ready to complete an order, select “View Cart” or hit the Cart icon.</p> <div data-bbox="1185 1575 1451 1646"> <div>VIEW CART</div> </div>
----	---

2.	<div> <div>Select “Check Out” from the homepage.</div> <div> <div>Shopping Cart</div> <div> <a>Continue Shopping > <a>GET A QUOTE <a>CHECKOUT </div> </div> <div> <a>Save Cart > </div> </div>
3.	<div> <div> <div>Complete:</div> <ol style="list-style-type: none"> 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 <div> Tip: Please include any shipping details or additional requests that you should need to help deliver your customer correctly. </div> </div> <div> <div>Checkout</div> <div>Secure Checkout</div> <div> <div>Shipping Address</div> <div>Enter New Shipping Address</div> <div> <div>Company*</div> <div>Address 1*</div> <div>Address 2</div> <div>COUNTRY* Please select</div> <div>City*</div> <div>State/Province</div> <div>Postal/Zip Code*</div> <div>Phone</div> </div> </div> <div> <div>Order Summary</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 Qty: 1 </div> </div> <div>  <div> 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 </div> </div> <div> <div>Subtotal:</div> <div>\$40.40</div> </div> <div> <div>Tax:</div> <div>Calculated at Domestic & Billing Address</div> </div> </div> </div> </div> </div>
4.	<div> <div>Once you review and complete your order details, select “Place Order”</div> <div> <a>PLACE ORDER </div> </div>
5.	<div> <div>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.</div> <div> <div>Thank You For Your Order!</div> <div> <div>Your Temporary Order Number: 0000039082</div> <div> 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. </div> <div> If you have any question regarding your quote, please contact us. </div> </div> </div> </div>