

QUICK REFERENCE GUIDE



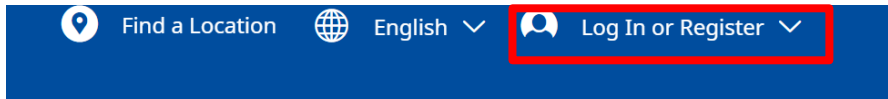
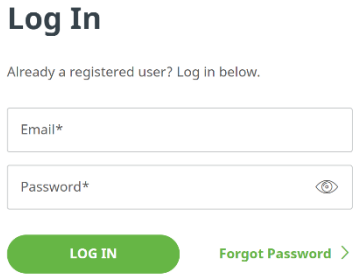
PLACING A QUOTE AND ORDER

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

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| 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. | 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">1. Navigating the shop products page.2. Using the Search Bar.3. Adding items via the Quick Cart. |

CREATING A QUOTE OR ORDER

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| 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">1. Using the “Shop Products” icon2. Using the Search Bar3. 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.

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](#)

| 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.



— 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

+ View CAD — 1 + **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

— 1 + **ADD TO CART** **ADD TO FAVORITES**

[Clear All](#) >

BODY MATERIAL

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| <p>8.</p> | <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> |  |
| <p>9.</p> | <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> |  |
| <p>10.</p> | <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> | |

| | <p>Once opened,</p> <ol style="list-style-type: none"> 1. Add in the Part Number 2. Add in the Quantity 3. Select “Add to Cart” | <div style="border: 1px solid #ccc; padding: 10px;"> <h3 style="text-align: center;">Quick Order</h3> <p style="text-align: center; font-size: small;">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.</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> <p style="font-size: x-small; margin-bottom: 5px;">Order by Entering Part Numbers and Quantities</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="font-size: x-small;">Part #</th> <th style="font-size: x-small;">Qty</th> <th style="font-size: x-small;">Note (Optional)</th> <th style="font-size: x-small; text-align: center;">✕</th> </tr> </thead> <tbody> <tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td style="text-align: center;">✕</td></tr> <tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td style="text-align: center;">✕</td></tr> <tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td style="text-align: center;">✕</td></tr> <tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td style="text-align: center;">✕</td></tr> <tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td style="text-align: center;">✕</td></tr> <tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td style="text-align: center;">✕</td></tr> <tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td style="text-align: center;">✕</td></tr> <tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td style="text-align: center;">✕</td></tr> </tbody> </table> </div> <div style="width: 35%; border: 1px solid #ccc; padding: 5px; font-size: x-small;"> <p style="margin-bottom: 5px;">Order by Uploading a List of Parts</p> <p>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.</p> <p style="text-align: center; color: green; margin-bottom: 5px;">↓ CSV Template</p> <div style="border: 1px solid #ccc; padding: 5px; background-color: #f9f9f9; margin-top: 5px;"> <p style="margin-bottom: 5px;">Import from file</p> <p style="font-size: x-small;">File extensions allowed: .csv Your csv file must include "part #" and "qty" columns. In the first line of the file, please include a header.</p> <p style="text-align: center; margin-top: 5px;">CHOOSE FILE</p> </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"/> | ✕ | <input type="text"/> | <input type="text"/> | <input type="text"/> | ✕ |
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| 11. | <p>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.</p> |
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| 12. | <p>Once complete, upload the file by selecting “Choose File”. Once uploaded select “Add to Cart”.</p> | <div style="border: 1px solid #ccc; padding: 10px;"> <h3 style="text-align: center;">Order by Uploading a List of Parts</h3> <p style="text-align: center; font-size: small;">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.</p> <p style="text-align: center; color: green; margin-bottom: 5px;">↓ CSV Template</p> <div style="border: 1px solid #ccc; padding: 5px; background-color: #f9f9f9; margin-top: 5px;"> <p style="margin-bottom: 5px;">Import from file</p> <p style="font-size: x-small;">File extensions allowed: .csv Your csv file must include "part #" and "qty" columns. In the first line of the file, please include a header.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px; background-color: #fff;"> <p style="font-size: x-small; margin-bottom: 5px;">SwagelokPartUpload-Test.csv was successfully loaded</p> <p style="text-align: center; margin-bottom: 5px;">Change Remove</p> </div> </div> <p style="text-align: center; margin-top: 10px;">ADD TO CART</p> </div> |
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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!


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| 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> |
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| 2. | <p>Select "Get a Quote" and the quote will be submitted to the Service Center.</p> |  |
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|---|---|---|-------------|------------|------------|--|-----------|--|---|--|-------|----------------|------------------|-------|
| 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 style="border: 1px solid #ccc; padding: 10px;"> <h3 style="margin: 0;">Quote Request</h3> <p style="font-size: small; margin: 5px 0;">Enter New Shipping Address</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; border: 1px solid #ccc; padding: 2px;">First Name*</td> <td style="width: 50%; border: 1px solid #ccc; padding: 2px;">Last Name*</td> </tr> <tr> <td colspan="2" style="border: 1px solid #ccc; padding: 2px;">Address 1*</td> </tr> <tr> <td colspan="2" style="border: 1px solid #ccc; padding: 2px;">Address 2</td> </tr> <tr> <td colspan="2" style="border: 1px solid #ccc; padding: 2px;"> <small>COUNTRY*</small> Please select ▼ </td> </tr> <tr> <td style="border: 1px solid #ccc; padding: 2px;">City*</td> <td style="border: 1px solid #ccc; padding: 2px;">State/Province</td> </tr> <tr> <td style="border: 1px solid #ccc; padding: 2px;">Postal/Zip Code*</td> <td style="border: 1px solid #ccc; padding: 2px;">Phone</td> </tr> </table> <p style="font-size: x-small; margin-top: 5px;"> <input type="checkbox"/> Request to save Shipping Address <i>Please allow 7-10 business days for processing a saved address</i> </p> </div> | First Name* | Last Name* | Address 1* | | Address 2 | | <small>COUNTRY*</small> Please select ▼ | | City* | State/Province | Postal/Zip Code* | Phone |
| First Name* | Last Name* | | | | | | | | | | | | | |
| Address 1* | | | | | | | | | | | | | | |
| Address 2 | | | | | | | | | | | | | | |
| <small>COUNTRY*</small> Please select ▼ | | | | | | | | | | | | | | |
| City* | State/Province | | | | | | | | | | | | | |
| Postal/Zip Code* | Phone | | | | | | | | | | | | | |

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| 4. | <p>Once submitted, you will receive a quote confirmation.</p> <hr style="border: 1px solid #ccc; margin: 10px 0;"/> <h2 style="text-align: center; margin: 0;">Thank You For Requesting a Quote!</h2> <p style="margin: 10px 0;">Your Temporary Quote Number: 0000039079</p> <p style="margin: 10px 0;">You will receive a follow-up from your local sales and service center with updated quote information.</p> <p style="margin: 10px 0;">If you have any question regarding your quote, please contact us.</p> <div style="margin-top: 20px; font-size: x-small;"> <p>YOUR LOCAL SALES & SERVICE CENTER</p> <p>Swagelok Southeast Texas</p> <p> 10110 Fairbanks N Houston Rd Houston, TX 77064</p> <p> 713-527-0233</p> <p> info@sch.swagelok.com</p> <p> https://www.southeasttexas.swagelok.solutions</p> </div> | |
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COMPLETING THE TRANSACTION – ORDER

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| 1. | <p>When ready to complete an order, select "View Cart" or hit the Cart icon.</p> |  |
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|---|--|---|---|---------|--------|--|--|---|--|---------|--------|--|--|-----------|--|---------|------|--|--|
| 2. | <p>Select “Check Out” from the homepage.</p> <div style="text-align: right;"> <h2>Shopping Cart</h2> <p> Continue Shopping > GET A QUOTE CHECKOUT </p> <p>Save Cart ></p> </div> | | | | | | | | | | | | | | | | | | |
| 3. | <div style="display: flex;"> <div style="flex: 1;"> <p>Complete:</p> <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 <p>Tip: Please include any shipping details or additional requests that you should need to help deliver your customer correctly.</p> </div> <div style="flex: 2;"> <h3>Checkout Secure Checkout</h3> <div style="display: flex;"> <div style="flex: 1;"> <h4>Shipping Address</h4> <p>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;"> <h4>Order Summary</h4> <table border="1"> <tr> <td></td> <td>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;">\$27.67</td> </tr> <tr> <td colspan="2">Qty: 1</td> <td></td> </tr> <tr> <td></td> <td>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;">\$12.73</td> </tr> <tr> <td colspan="2">Qty: 1</td> <td></td> </tr> <tr> <td colspan="2">Subtotal:</td> <td style="text-align: right;">\$40.40</td> </tr> <tr> <td colspan="2">Tax:</td> <td style="text-align: right;"><i>Calculated at Payment & 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 & Billing Address</i> |
|  | 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 & Billing Address</i> | | | | | | | | | | | | | | | | | |
| 4. | <p>Once you review and complete your order details, select “Place Order”</p> <div style="text-align: center; margin-top: 20px;"> PLACE ORDER </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="text-align: center;">Thank You For Your Order!</h2> <p>Your Temporary Order Number: 0000039082</p> <p>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>If you have any question regarding your quote, please contact us.</p> | | | | | | | | | | | | | | | | | | |