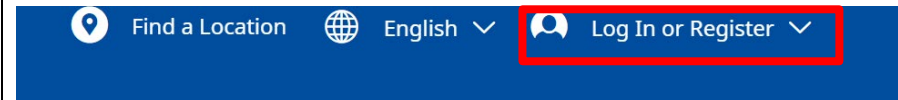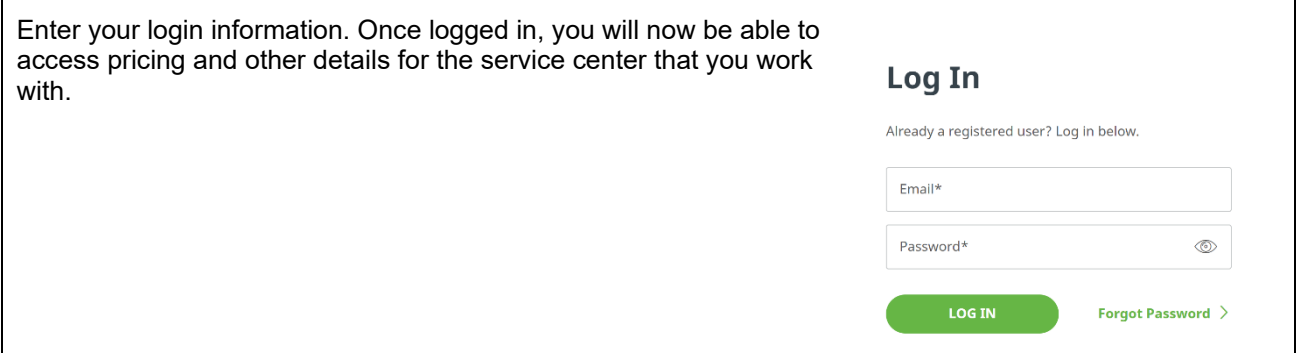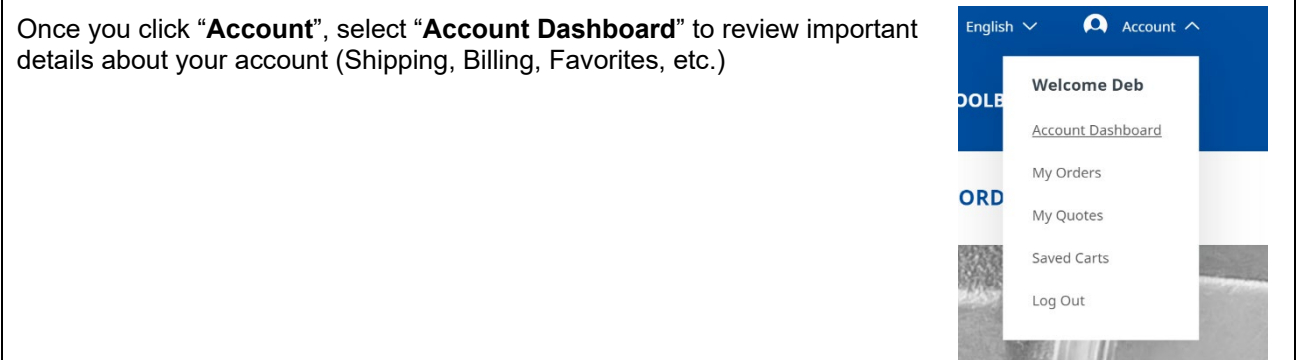# QUICK REFERENCE GUIDE

Swagelok

USING THE ACCOUNT DASHBOARD

Purpose*: This document is to be used by new, Swagelok Southeast Texas 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 English ⌄ **Log In or Register** ⌄
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** Already a registered user? Log in below. Email* Password* LOG IN Forgot Password ›
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. Swagelok Southeast Texas ⌄ English ⌄ **Account** ⌄
4.	Once you click "**Account**", select "**Account Dashboard**" to review important details about your account (Shipping, Billing, Favorites, etc.) English ⌄ Account ⌃ **Welcome Deb** Account Dashboard My Orders My Quotes Saved Carts Log Out

5.	If you want to review your orders, select **"My Orders"**.	

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 ⌄ | 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"**.	