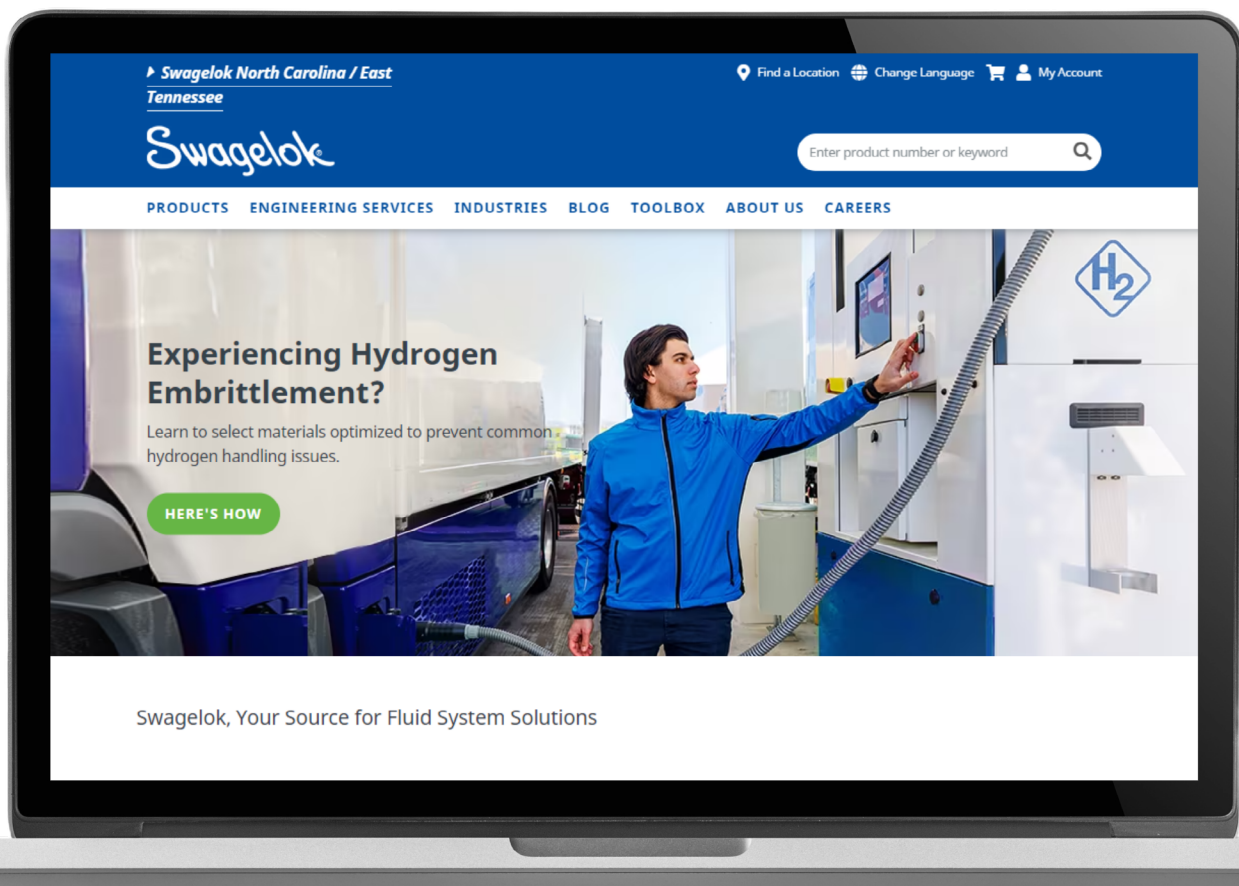




Swagelok®

Swagelok North Carolina | East Tennessee

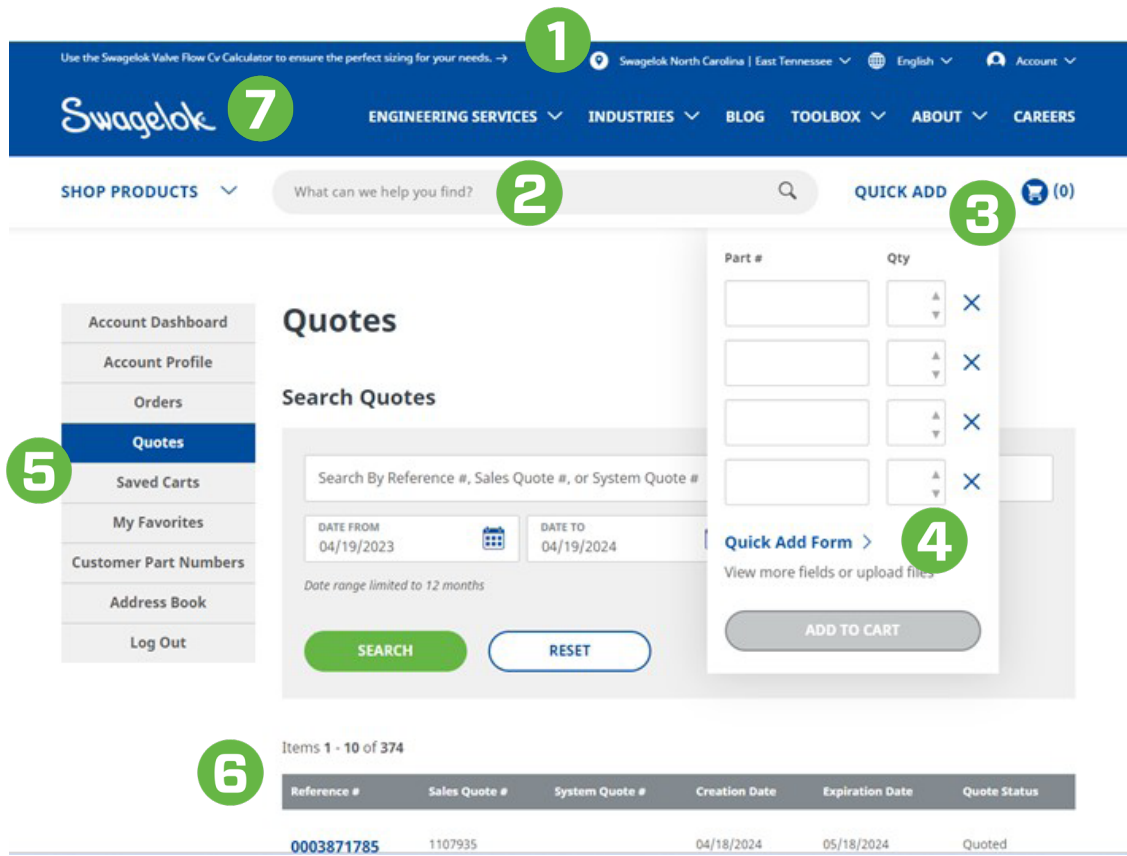
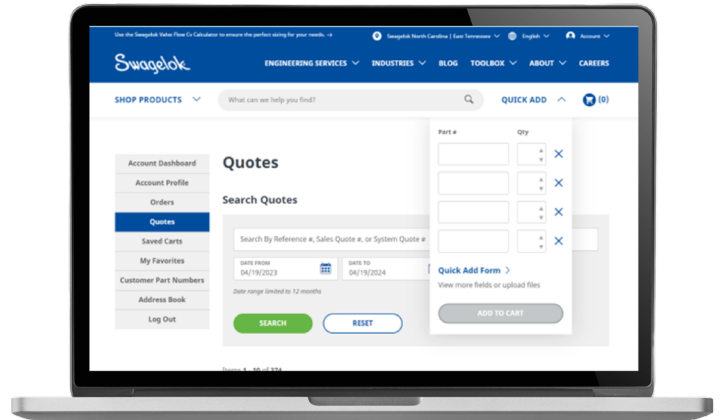


Swagelok North Carolina | East Tennessee Punchout Quick Reference Guide

Homepage

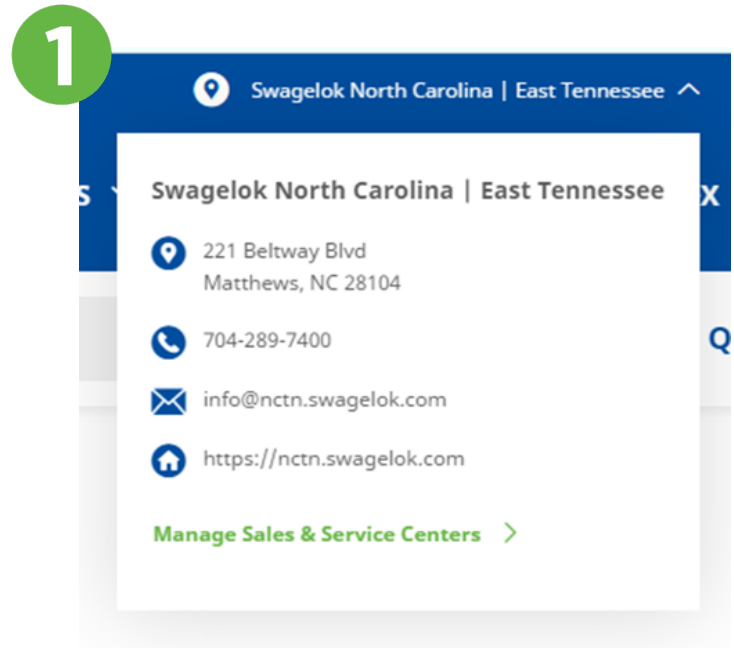
The homepage offers links to access important information:

1. Contact info for your Swagelok Sales & Service Center
2. Search for parts
3. Quick add parts to your shopping cart without “shopping”
4. Quick Add Form – add to cart by uploading a list of parts
5. Quoting – view and request quotes
6. Load a processed quote to your shopping cart
7. Clicking the “Swagelok” logo from anywhere on punchout will take you to the homepage



1. Contact Info

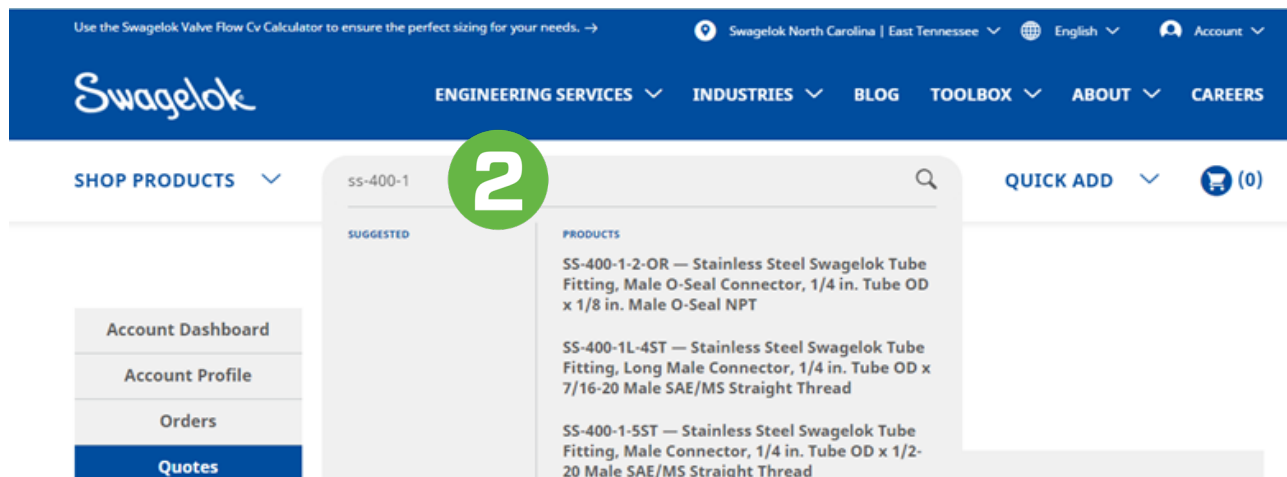
1. Contact info for Swagelok North Carolina East Tennessee can be found here.



2. Searching for Products

Search for parts

2. Type Part # or keyword in search box. If part exists, it will automatically display in drop-down.



3. Quick Add Parts

Quick Add parts to your shopping cart without “shopping”

3. Add Part # and Qty. Select ADD TO CART when finished.

The screenshot shows the Swagelok website interface. At the top, there is a navigation bar with the Swagelok logo and links for ENGINEERING SERVICES, INDUSTRIES, BLOG, TOOLBOX, ABOUT, and CAREERS. Below the navigation bar, there is a search bar with the text 'SHOP PRODUCTS' and 'ss-400-1'. A 'QUICK ADD' button is visible in the top right corner. The main content area is titled 'Quotes' and includes a 'Search Quotes' section with a search bar and date filters. A 'Quick Add Form' is overlaid on the right side of the page, containing a table with columns for 'Part #' and 'Qty'. The table has two rows: the first row contains 'SS-4-VCR-6-400' and '1', and the second row contains 'SS-400-1-4' and '10'. There are also empty rows for additional parts. Below the table is a green 'ADD TO CART' button. A green circle with the number '3' is overlaid on the 'ADD TO CART' button.

4. Quick Form

The screenshot shows the Swagelok website interface, similar to the previous one. The 'Quick Add Form' is overlaid on the right side of the page. The table has two rows: the first row contains 'SS-4-VCR-6-400' and '1', and the second row contains 'SS-400-1-4' and '10'. There are also empty rows for additional parts. Below the table is a green 'ADD TO CART' button. A green circle with the number '4' is overlaid on the 'ADD TO CART' button.

Add to Cart by Entering Part Numbers and Quantities

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"/>	×
<input type="text"/>	<input type="text"/>	<input type="text"/>	×
<input type="text"/>	<input type="text"/>	<input type="text"/>	×

Add to Cart 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](#)

Please limit file upload to 100 rows for best performance.

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

ADD TO CART

4

[↓ CSV Template](#)

Please limit file upload to 100 rows for best performance.

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.

verify prices.csv
was successfully loaded
[Change](#) | [Remove](#)

ADD TO CART

4

Add to cart by uploading a list of parts using Quick Form.

4. Select Quick Add Form.

Download CSV template.

Complete and save form as directed.

Once saved, select Choose File and upload your file.

Once file is uploaded, you will see your file name listed and ADD TO CART button will be green.

Select ADD TO CART to load your file to your shopping cart.

5. Request a Quote

When an item on the punchout does not have a price, it is necessary to request a quote.

5. The Shopping Cart will tell you if the item is unpriced and the cart can only be submitted as a quote. Select GET A QUOTE to start the process.

The screenshot shows a shopping cart interface. At the top, there is a search bar and a cart icon with a '1' next to it. A blue banner across the top of the cart area contains the text 'The cart can only be submitted as a quote.' and a large green circle with the number '5'. Below this banner, the 'Shopping Cart' title is displayed, along with an 'Export to CSV' button. There are three buttons: 'GET A QUOTE' (highlighted with a blue border), 'RETURN CART', and 'UPDATE CART'. A 'Clear Cart' link is also present. Below the buttons is a table header with columns: Item, Customer Info, Availability, Price, Quantity, and Subtotal. A red banner below the header reads '5 Products With No Price'. The first item in the cart is an 'Unlisted Part' with part number 'TEST'. It has a 'Customer Part #' field that is empty with the note 'No customer part # available'. There is a 'Notes' field with a character limit of 255. The quantity is set to 1. Below the cart items is a 'Quote Request' section. It includes a form for 'Enter New Shipping Address' with fields for Company*, Address 1*, Address 2, Country* (Please select), City*, State/Province, Postal/Zip Code*, and Phone. There is a checkbox for 'Request to save Shipping Address' and a note: 'Please allow 7-10 business days for processing a saved address'. Below this is a 'Submitted By' section with fields for Full name* and Email*.


Shopping Cart

Cancel Requisition >

GET A QUOTE RETURN CART UPDATE CART

Clear Cart >

Export to CSV

Item	Customer Info	Availability	Price	Quantity	Subtotal
5 Products With No Price					
 Unlisted Part Part # TEST	Customer Part # No customer part # available	Call for availability		- 1 +	X
Notes Maximum Characters: 255					
Save >					

Quote Request

Enter New Shipping Address

Company*

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

Submitted By

Full name*

Email*

After selecting: GET A QUOTE

The Quote Request screen will display, enter necessary information.

Select SUBMIT QUOTE REQUEST and the quote will electronically be sent to Swagelok North Carolina | East Tennessee.

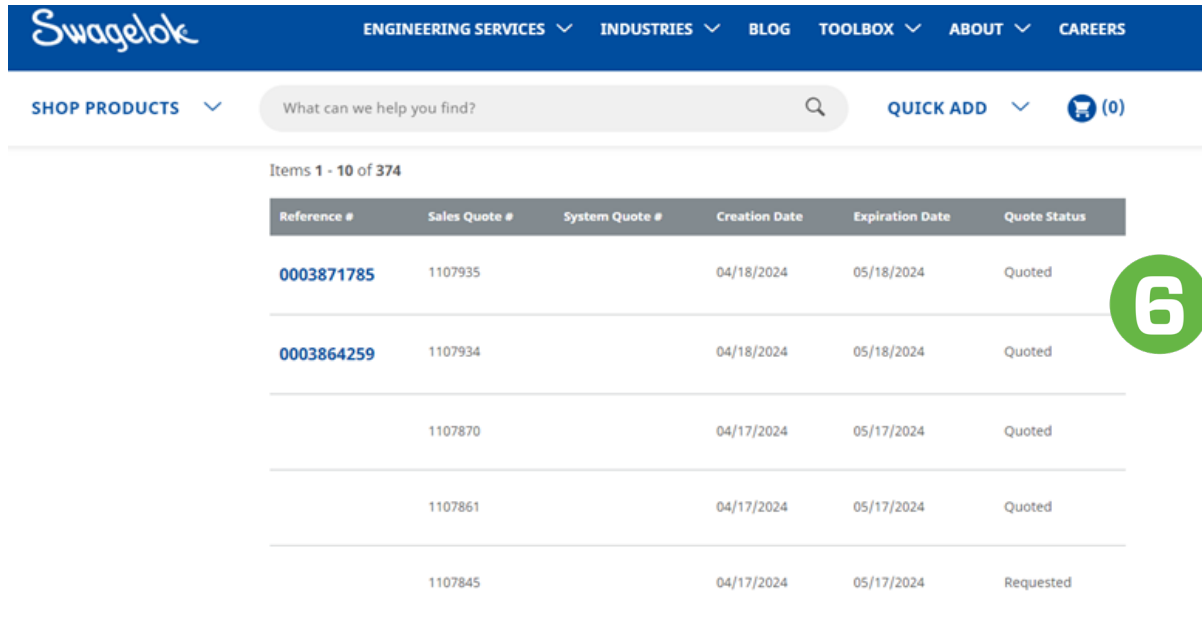
6. Add Processed Quotes to Cart

Load a processed quote to your shopping cart.

All submitted quotes, regardless of quote status, are visible from the homepage. **Swagelok North Carolina | East Tennessee will notify you once the quote has been processed.**

6. You can go back to punchout and retrieve the quote.

Go to your homepage under Quotes and select your quote. This will load the now-priced items to your shopping cart.



Swagelok

ENGINEERING SERVICES ▾ INDUSTRIES ▾ BLOG TOOLBOX ▾ ABOUT ▾ CAREERS

SHOP PRODUCTS ▾ What can we help you find? QUICK ADD ▾ (0)

Items 1 - 10 of 374

Reference #	Sales Quote #	System Quote #	Creation Date	Expiration Date	Quote Status
0003871785	1107935		04/18/2024	05/18/2024	Quoted
0003864259	1107934		04/18/2024	05/18/2024	Quoted
	1107870		04/17/2024	05/17/2024	Quoted
	1107861		04/17/2024	05/17/2024	Quoted
	1107845		04/17/2024	05/17/2024	Requested

7. Troubleshooting

7. Clicking the “Swagelok” logo from anywhere on punchout will take you to the homepage.

If you are trying to return your shopping cart back to your business system, but the RETURN TO REQUISITION button is gray (not green) and unclickable, notify Swagelok North Carolina | East Tennessee at info@nctn.swagelok.com.

If you require a classification code for an item, notify the Swagelok North Carolina | East Tennessee. Include the part number and classification version you require.

If you receive a punchout error for what appears to be no reason, clear your cookies and try again. If the problems persist, contact EDI@swagelok.com.