

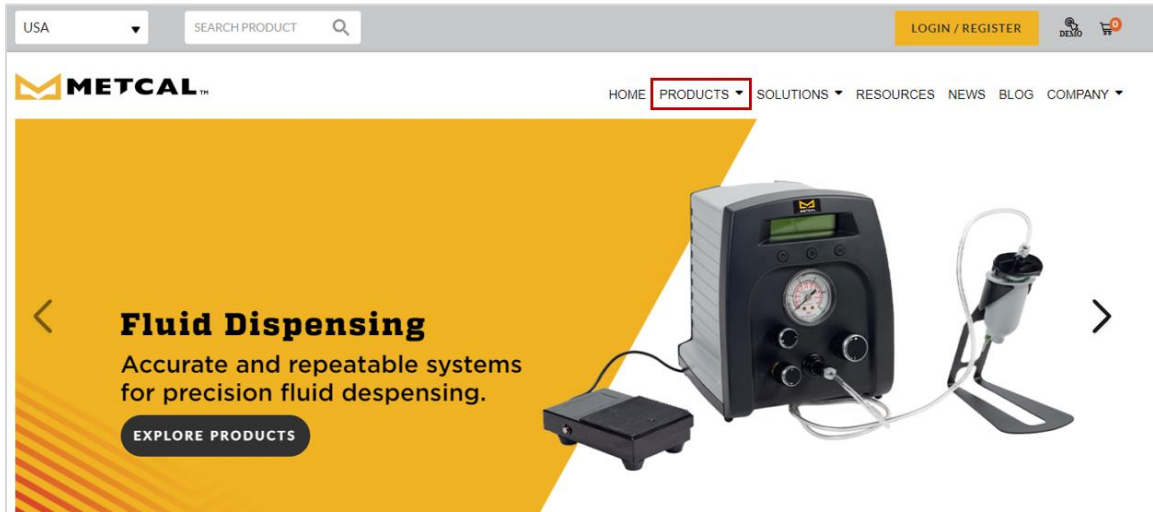
This user guide provides the steps for completing basic tasks such as logging in and entering an online order through Metcal.com and Techcon.com. For additional support, please contact OKI customer service.

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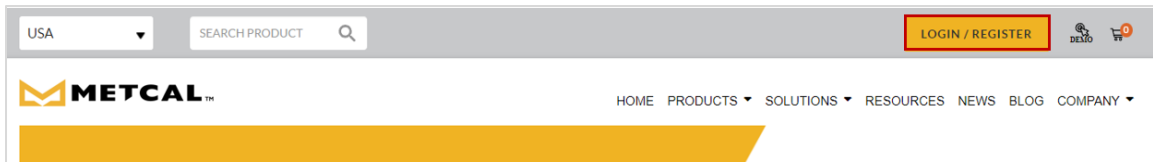
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## 1. Getting Started with the METCAL/TECHCON Portal

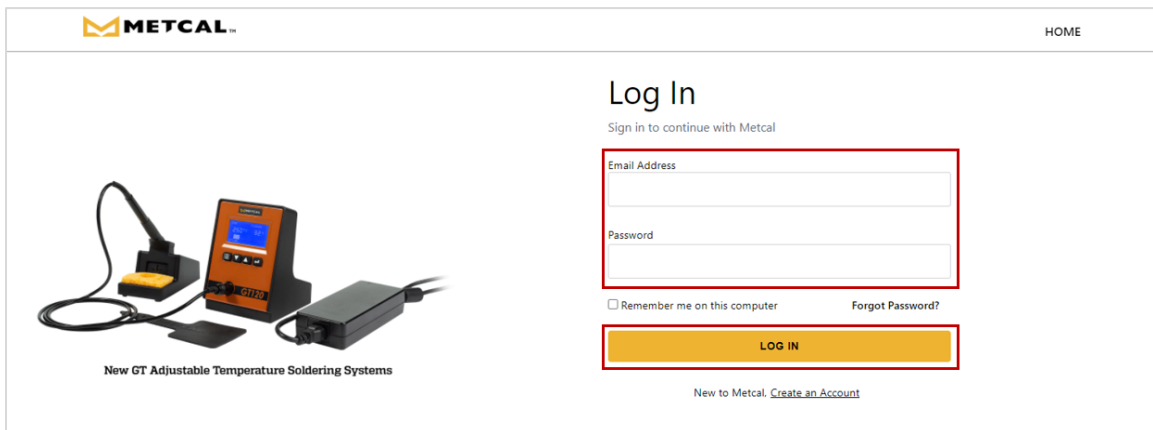
1.1. From the Home page, click the **Products** link to navigate to the *Products* page.



1.2. To log into the Portal, click the **LOGIN/REGISTER** button from the *Products* page.



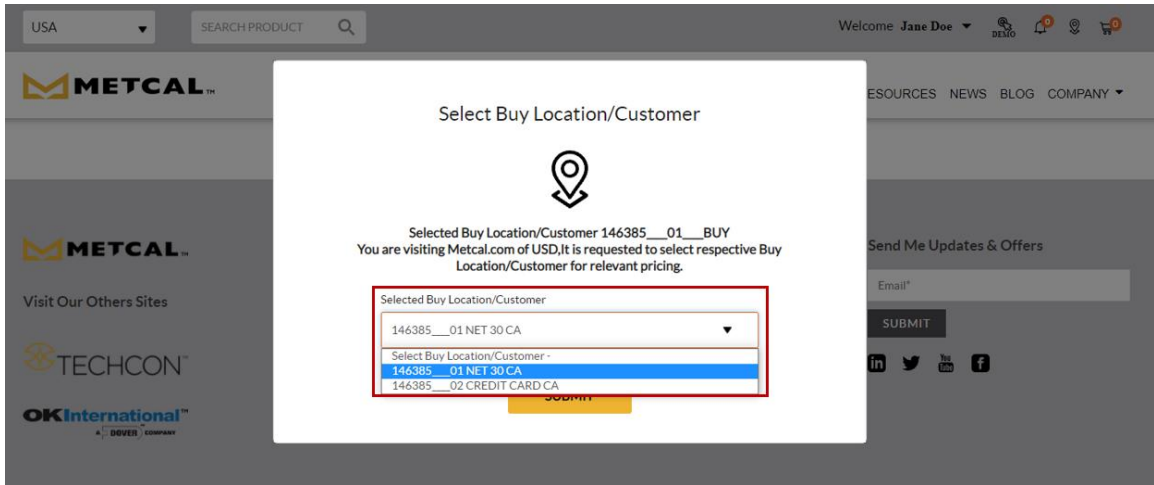
1.3. If you are an existing customer, you should have received an email with login credentials and a temporary password to log in. After logging in, you will be prompted to create a new password.



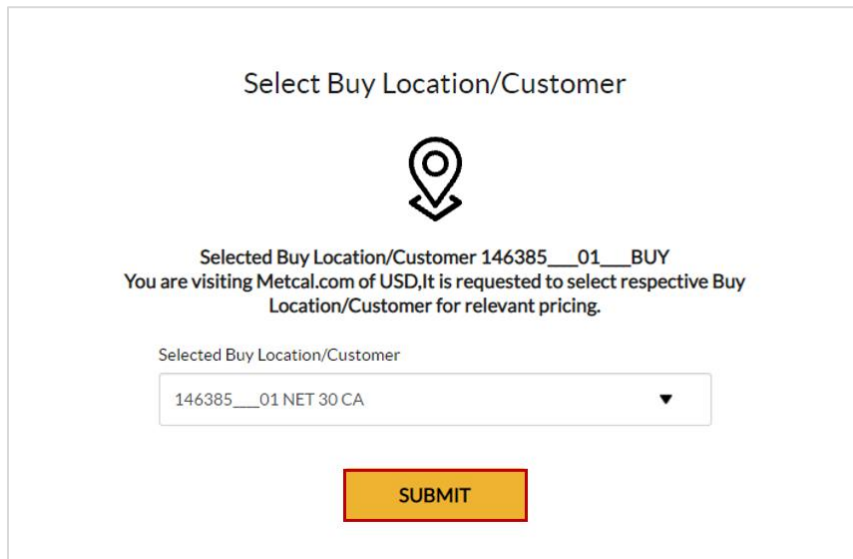
1.4. If you are a new user registering with an existing customer account, click **Create an Account**.

1.5. Complete the registration fields on the *Register With Us* page. Select the **Distributor** or **Customer** radio button, add your **name**, **email**, and **customer ID**. Your customer ID can be found on your sales order or invoice. (Note: If you are unsure of your customer ID number, contact OKI Customer Service). Select your **User Role** and complete the remaining fields. Once complete, click **Register**.

- 1.6. If your account has multiple Buy Locations, a dialog box displays **Select Buy Location/Customer**. Begin the order process by selecting a *Buy Location* from the drop-down.

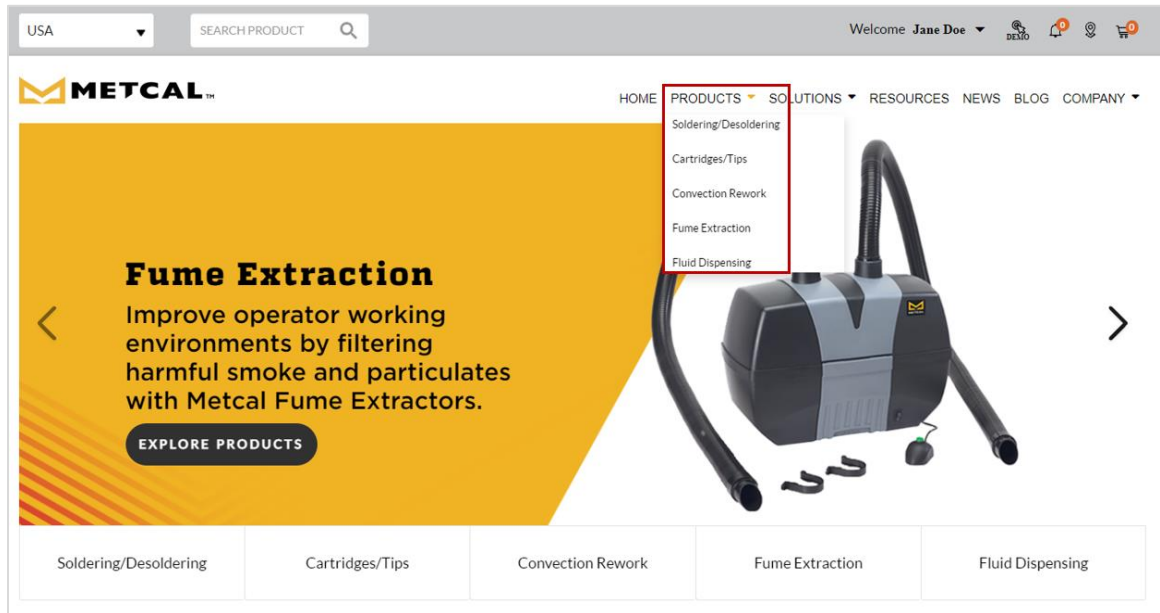


- 1.7. Click **Submit**.

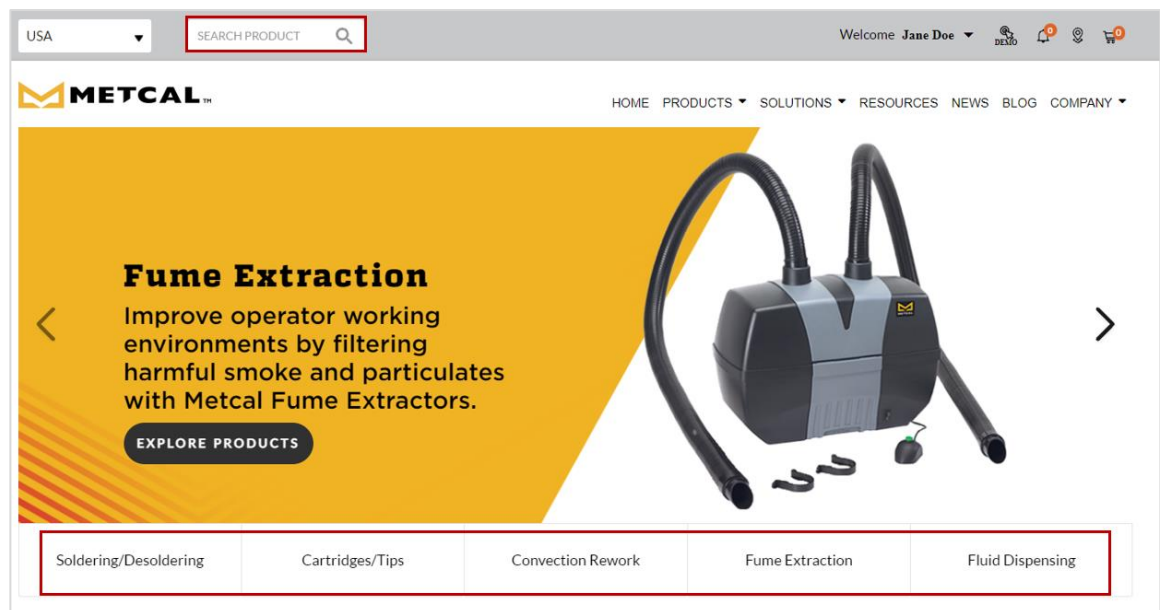


## 2. Finding a Product

2.1. The **Products** drop-down menu displays a list of product categories.



2.2. When in the Products section of the website, you can also use the **Search Product** field to search by an OKI part number. You may also search by product category along the bottom of the landing page.

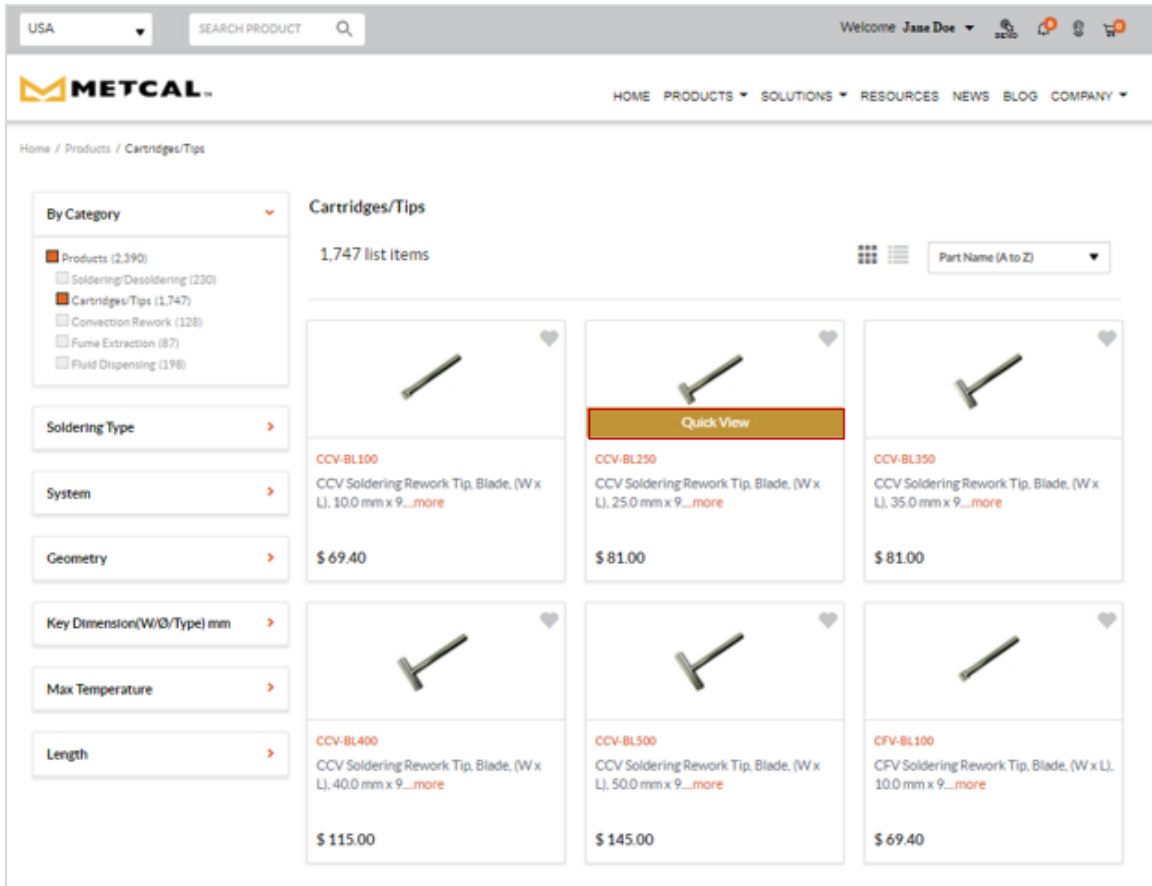


2.3. Once in your chosen product category, scroll or further filter your request to find the desired product.

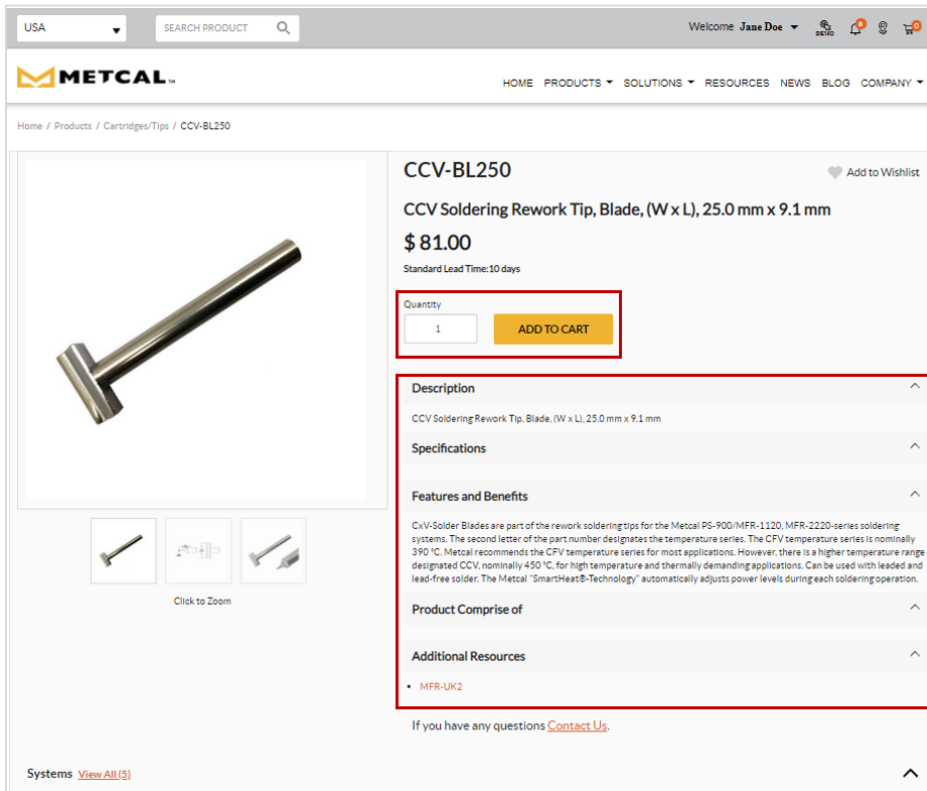
The screenshot displays the METCAL e-commerce portal interface. At the top, there is a navigation bar with 'USA' as a dropdown, a 'SEARCH PRODUCT' field, and a user greeting 'Welcome Jane Doe'. Below this is the METCAL logo and a main navigation menu including 'HOME', 'PRODUCTS', 'SOLUTIONS', 'RESOURCES', 'NEWS', 'BLOG', and 'COMPANY'. The breadcrumb trail shows 'Home / Products / Cartridges/Tips'. On the left, a filter sidebar is highlighted with a red box, containing sections for 'By Category' (listing 'Products (2,391)', 'Soldering/Desoldering (231)', 'Cartridges/Tips (1,747)', 'Convection Rework (128)', 'Fume Extraction (87)', and 'Fluid Dispensing (198)'), 'Soldering Type', 'System', 'Geometry', 'Key Dimension(W/O/Type) mm', 'Max Temperature', and 'Length'. The main content area is titled 'Cartridges/Tips' and shows '1,747 list items'. A 'Part Name (A to Z)' dropdown is visible. The product listings are arranged in a grid of six items, each with an image, a heart icon, a product name (e.g., 'CCV-BL100'), a description, and a price (e.g., '\$ 69.40').

### 3. Viewing a Product

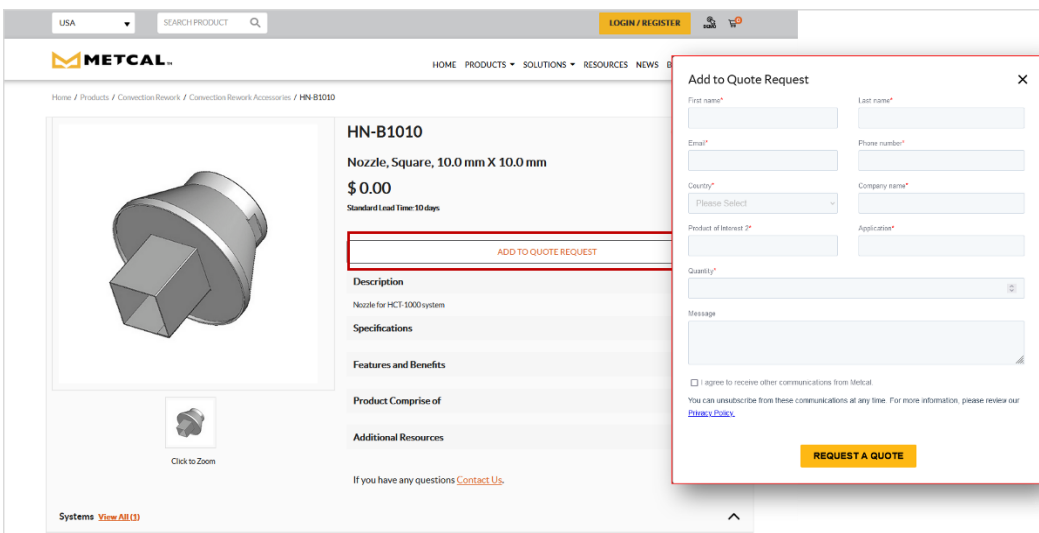
- 3.1. Once you find your product, you can click the product image for a full description or the **Quick View** button.



- 3.2. Click **Description, Specifications, Features and Benefits, Product Comprise of** and **Additional Resources** to display information about the product. You can also change the quantity or **Add to Cart**.



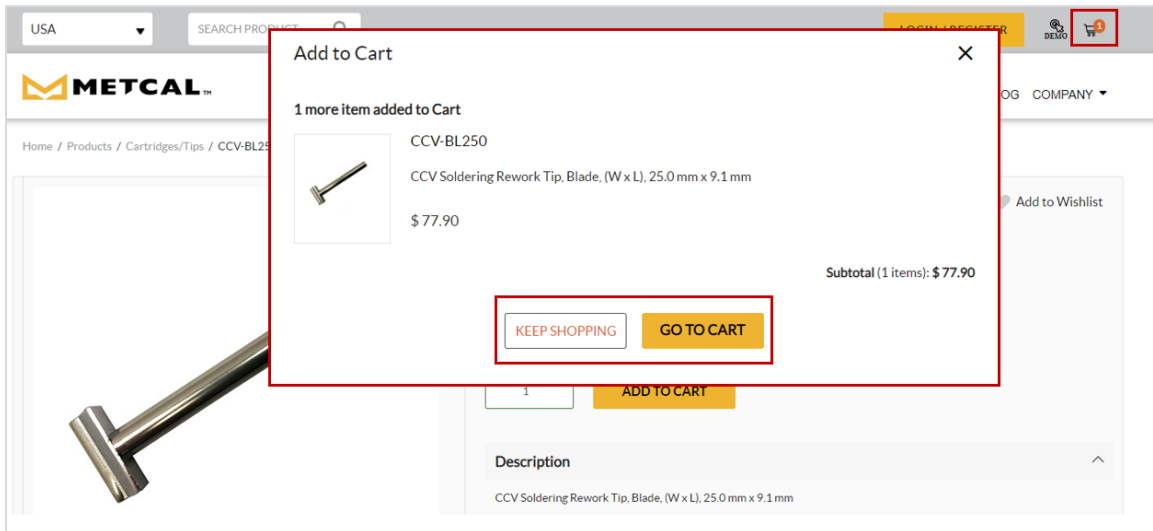
- 3.3. Some items require a request for a quote. Click **Add to Quote Request** and complete the required fields, then click **Request a Quote**.



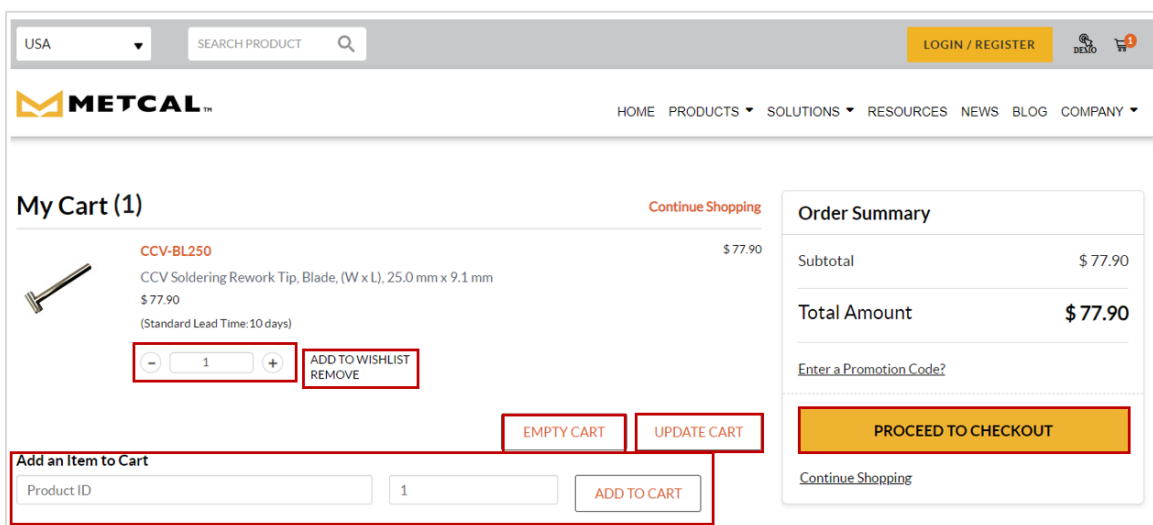


## 4. Adding to Your Cart

- 4.1. Once you have placed your items in the cart, a pop-up box confirms the item has been added. You can **Keep Shopping** or **Go to Cart**. You can also view your cart by clicking the shopping cart icon at the top of any page within the portal.



- 4.2. Change the quantity of your items, **Add To Wishlist**, **Remove** items, **Empty Cart**, **Update Cart**, or **Add an Item to Cart** using a product ID. **Note:** manually change the quantity by highlighting the current number of items and typing the correct number and pressing Enter. If you use the plus or minus signs, be sure to click **Update Cart** to refresh the screen and reflect the new quantity. Continue to check out by clicking **Proceed to Checkout**.



## 5. Checking Out

- 5.1. Change the *Invoice Address* and *Shipping Address* by selecting another saved address from the **Select a different address** drop-down or entering a new address by clicking **+ Add a New Address**.

The screenshot shows the checkout page with the following elements:

- Progress Bar:** 1 Addresses (selected), 2 Shipping, 3 Payment, 4 Review, 5 Receipt.
- Invoice Address:** US DISTRIBUTOR 1, 10800 VALLEY VIEW STREET, CYPRESS, 90630, United States. E-Mail Address: Jdoe@Okinternational.Com. A red box highlights the "+ Add a New Address" link.
- Shipping Address:** US DISTRIBUTOR 1, 1905 LANA AVE NE, SALEM, 97314, United States. A red box highlights the "Select a different address" dropdown menu, which is currently open and shows the selected address: "US DISTRIBUTOR 1., 10800 VALLEY VIEW STREET, CYPRESS".
- Order Summary:** Subtotal \$ 324.00. Shipping charges will be added at the time of invoice if applicable. Tax ID field with "Apply" button. Total Amount \$ 324.00. "CONTINUE CHECKOUT" button and "Continue Shopping" link.

- 5.2. If you have a resale certificate on file with OKI, the **Tax ID** field will pre-populate with your tax ID number. If it does not pre-populate, you will need to enter it manually, then click **Apply**. You must mail your Resale Certificate to [orders@okinternational.com](mailto:orders@okinternational.com) to update OKI records.

The screenshot shows the checkout page with the following elements:

- Progress Bar:** 1 Addresses, 2 Shipping (selected), 3 Payment, 4 Review, 5 Receipt.
- Invoice Address:** US DISTRIBUTOR 1, 10800 VALLEY VIEW STREET, CYPRESS, 90630, United States. E-Mail Address: Jdoe@Okinternational.Com. "+ Add a New Address" link.
- Shipping Address:** US DISTRIBUTOR 1, 1905 LANA AVE NE, SALEM, 97314, United States. A red box highlights the "Select a different address" dropdown menu, which is currently open and shows the selected address: "US DISTRIBUTOR 1., 10800 VALLEY VIEW STREET, CYPRESS".
- Order Summary:** Subtotal \$ 324.00. Shipping charges will be added at the time of invoice if applicable. Tax ID field with "Apply" button. Total Amount \$ 324.00. "CONTINUE CHECKOUT" button and "Continue Shopping" link.

- 5.3. For the UK and EU webstore customers, all shipments outside of the UK require a valid VAT ID number. The VAT ID will be pre-populated with your VAT number (if you are a registered customer). Enter it manually if it does not pre-populate, then click **Apply**. No shipment outside the UK will be possible without a valid VAT number.

Please contact [Europe-orders@okinternational.com](mailto:Europe-orders@okinternational.com) if you have any questions.

### Order Summary

Subtotal	£ 98.00
----------	---------

Shipping charges will be added at the time of invoice if applicable

VAT ID	<input type="text" value="VAT ID"/>	<b>Apply</b>
--------	-------------------------------------	--------------

---

Total Amount	£ 98.00
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Enter a Promotion Code?

**CONTINUE CHECKOUT**

[Continue Shopping](#)

- 5.4. Once all items are in your cart and you are ready to check out, you must **check the box** to confirm that no direct or indirect shipments will be made to: Cuba, Iran, North Korea, Sierra Leone, Palestinian Territories, South Sudan, Myanmar, & Crimea Ukraine before you can continue to checkout. Click **Continue to Checkout**.

**METCAL**

1 Addresses    2 Shipping    3 Payment    4 Review    5 Receipt

**Invoice Address**  
 US DISTRIBUTOR 1  
 10800 VALLEY VIEW STREET  
 CYPRESS, 90630,  
 United States  
 E-Mail Address: Jdoe@Okinternational.Com  
 + Add a New Address

**Shipping Address**  
 US DISTRIBUTOR 1  
 1905 LANA AVE NE  
 SALEM, 97314,  
 United States  
 Select a different address  
 + Add a New Address

I confirm that no direct or indirect shipments will be made to : Cuba, Iran, North Korea, Sierra Leone, Palestinian Territories, South Sudan, Myanmar, & Crimea Ukraine.

**Order Summary**

Subtotal \$ 324.00

Shipping charges will be added at the time of invoice if applicable

Tax ID   [Apply](#)

**Total Amount \$ 324.00**

Enter a Promotion Code?  
[CONTINUE CHECKOUT](#)  
[Continue Shopping](#)

- 5.5. Select a shipping option. Orders default to Use the default shipping method. You may also check the box to **Add Packing Slip Message** and complete the necessary fields. Click **Continue Checkout** to continue with the default shipping method.

**METCAL**

1 Addresses    2 Shipping    3 Payment    4 Review    5 Receipt

**SELECT SHIPPING OPTION**  
 Default shipping method:  
 S105

Use this default shipping method  
 Provide new Shipping method

**SELECT FREIGHT TERM**

Bill  
 Collect

**ENTER NEW DELIVERY METHOD**

Ex: UPS Ground  
 Carrier will be XPO for freight shipments or UPS for parcel shipments  
 Shipping charges will be added at the time of invoice

Add Packing Slip Message

**Order Summary**

Subtotal \$ 324.00

Shipping Cost \$ 0.00

Shipping charges will be added at the time of invoice if applicable

Tax ID   [Apply](#)

**Total Amount \$ 324.00**

Enter a Promotion Code?  
[CONTINUE CHECKOUT](#)  
[Continue Shopping](#)

- 5.6. Click **Provide new Shipping Method** to select freight term. Selecting **Bill** allows you to **Enter New Delivery Method** (e.g., UPS Ground). Selecting **Collect** allows you to **Enter New Carrier and Shipping Method** and **Enter Carrier Account #**.

- 5.7. If payment is by Invoice, you must provide a **PO number**. If payment is by Credit Card, a PO number is optional.

- 5.8. If only paying by Credit Card, you will be redirected to a secure site to provide credit card details.

Billing      Payment      Review      Receipt

---

### Billing Information

\* Required field

First Name \*

Last Name \*

Address Line 1

Address Line 2

City \*

Country/Region \*

State/Province

Zip/Postal Code

[Cancel Order](#)

### Your Order

Total amount	\$324.00
--------------	----------

- 5.9. Complete the payment details by entering your **card type**, **card number**, **expiration month**, **expiration year**, and **CVN**. Click **Next** to review your order, payment information, and complete your payment.



Billing **Payment** Review Receipt



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### Payment Details 🔒

\* Required field

Card Type \*

 Visa   Mastercard

 Amex   Discover


Card Number \*

Expiration Month \* Expiration Year \*

Month  Year

CVN

This code is a three or four digit number printed on the back or front of credit cards.

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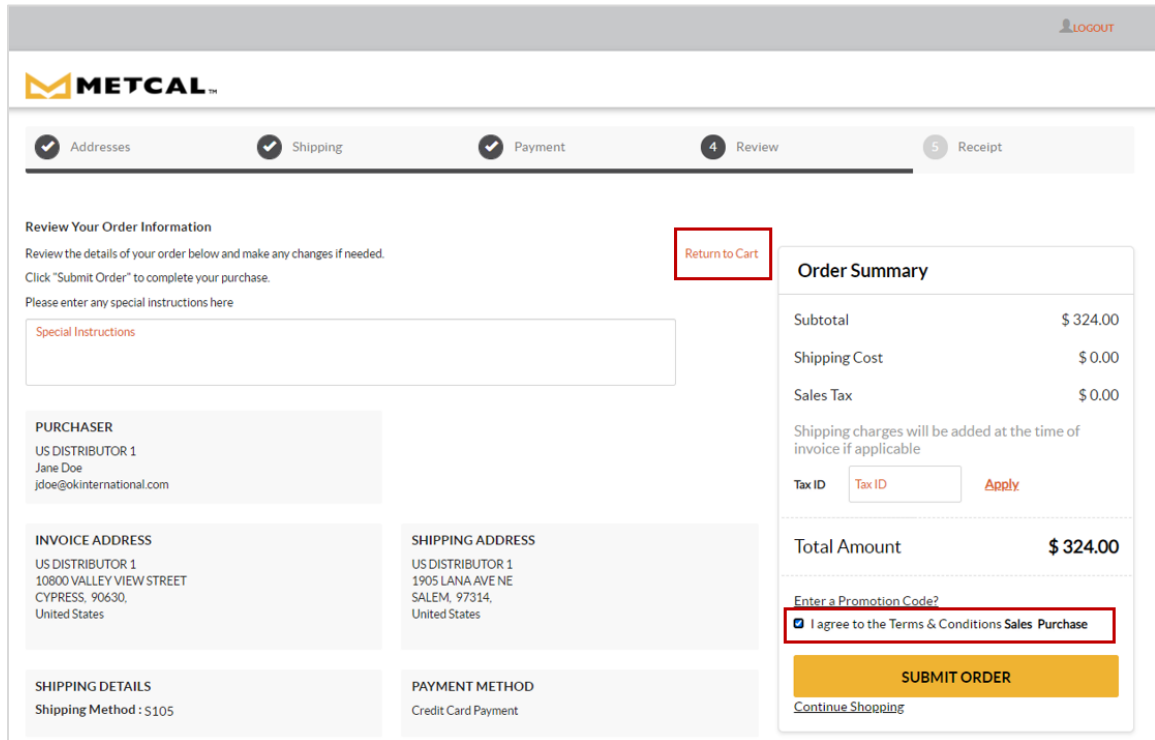
[Cancel Order](#)

### Your Order

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Total amount	\$324.00
--------------	----------

5.10. Review your order information. Click **Return to Cart** to make changes to your cart. If everything is correct, check the box next to I agree to the Terms and Conditions (you may click the Sales and Purchase links to review the terms and conditions), then click **Submit Order**.



**METCAL™**

Addresses Shipping Payment **4 Review** 5 Receipt

**Return to Cart**

**Order Summary**

Subtotal	\$ 324.00
Shipping Cost	\$ 0.00
Sales Tax	\$ 0.00

Shipping charges will be added at the time of invoice if applicable

Tax ID  [Apply](#)

**Total Amount \$ 324.00**

Enter a Promotion Code?

I agree to the Terms & Conditions [Sales](#) [Purchase](#)

**SUBMIT ORDER**


[Continue Shopping](#)




## 6. Viewing Your Order

### Viewing Your Order through My Account

- 6.1. You may view your order through the cart upon order completion. Click **My Account** at the bottom of the *Order Summary*.

 **Thank you for your Order**

Your order number is: 00002504  
 Test PO for US Dist  
 We will email [jdoo@okinternational.com](mailto:jdoo@okinternational.com) to keep you updated on the status of your order.

 Please send your exemption certificate to [eorders@okinternational.com](mailto:eorders@okinternational.com)

**PURCHASER**

US DISTRIBUTOR 1  
 Jane Doe  
[jdoo@okinternational.com](mailto:jdoo@okinternational.com)  
 123456789

**INVOICE ADDRESS**

US DISTRIBUTOR 1  
 10800 VALLEY VIEW STREET  
 CYPRESS, CA 90630,  
 United States

**SHIPPING ADDRESS**

US DISTRIBUTOR 1  
 10800 VALLEY VIEW STREET  
 CYPRESS, CA 90630,  
 United States

**SHIPPING DETAILS**

Freight Term : Collect  
 Shipping Method : FedEx 2nd Day Air  
 Carrier Account # : 123456789

**PAYMENT METHOD**

Invoice  
 CUSTOMER PO NUMBER  
 Test PO for US Dist


**Order Summary**

Subtotal	\$ 899.00
Shipping Cost	\$ 0.00
Sales Tax	\$ 0.00
Shipping charges will be added at the time of invoice if applicable	
Tax ID	ABC2233
<b>Total Amount</b>	<b>\$ 899.00</b>

**Account**

You can always access your account at [My Account](#).

[CONTINUE SHOPPING](#)



**CV-5210** \$ 899.00

80 Watt CV Advanced Soldering and Rework System  
 (Standard Lead Time: 10 days)  
 \$ 899.00

QUANTITY: 1

6.2. On the *My Account* page, you will see an overview of your *Most Recent Purchases*.

Home / My Account / Overview

Hello  
**Jane Doe**  
(Buyer)  
(Customer ID: 146385)  
BuyLocation ID: 146385\_\_01

**Hi, Jane Doe (US DISTRIBUTOR 1)**  
**Welcome Back!**

[CONTINUE SHOPPING](#) [QUICK ORDER](#)

Everything you need to track your orders, update your address book, edit your account information and more is right here.

Most Recent Alerts (0 / 0)

Most Recent Purchases [View all](#)

ORDER DATE	CUST. PO	ORDER NO.	ITEMS	STATUS	DESTINATION	ORDER TOTAL
09/27/21	Test PO for US Dist	WO00002504	1	Pending	US DISTRIBUTOR 1 10800 VALLEY VIEW STREET CYPRESS CA, 90630 United States	\$ 899.00

6.3. You may also view your order from the top of the home page. Click **Welcome**, then select **My Orders** from the drop-down menu.

USA SEARCH PRODUCT

Welcome Jane Doe

- My Profile
- My Orders
- My Wishlist
- My Addresses
- Logout

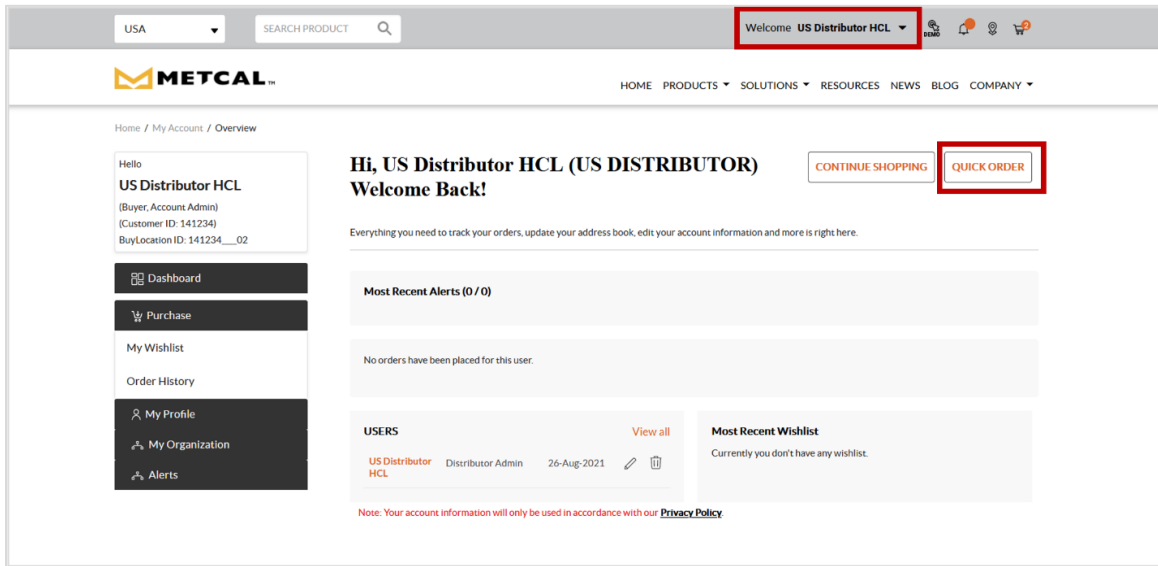
**Fluid Dispensing**  
Accurate and repeatable systems for precision fluid dispensing.  
[EXPLORE PRODUCTS](#)

Soldering/Desoldering Cartridges/Tips Convection Rework Fume Extraction Fluid Dispensing

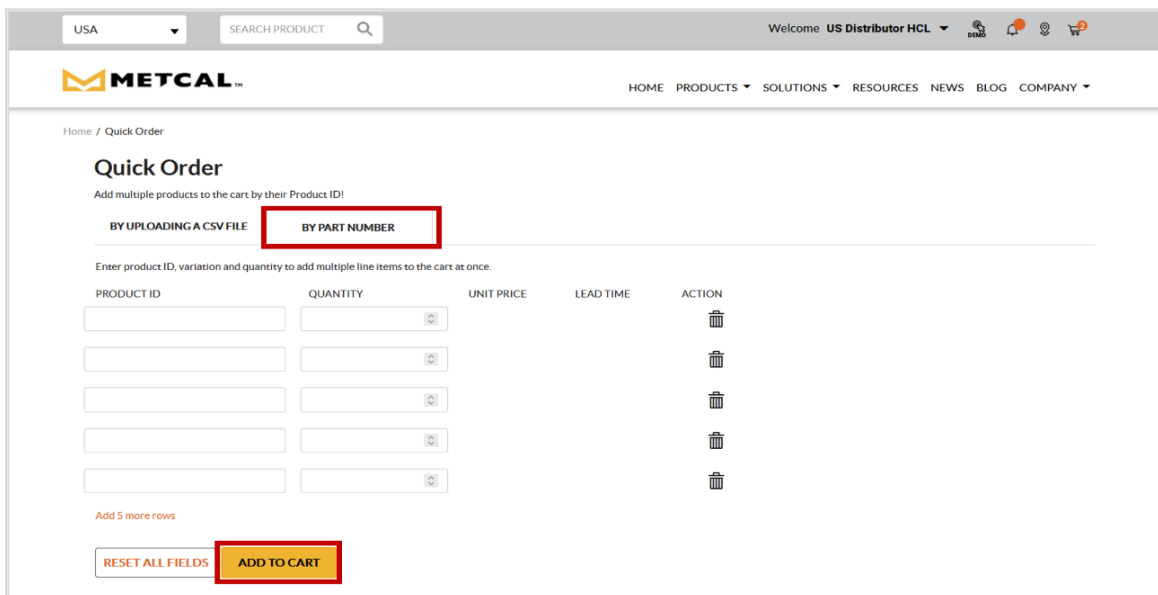
## 7. Quick Order and CSV Upload Order Entries

### Ordering with Quick Order

- 7.1. If you know the product number, you can do a Quick Order entry by clicking the Welcome link in the top right corner. Once on the My Account page, click on **Quick Order**.



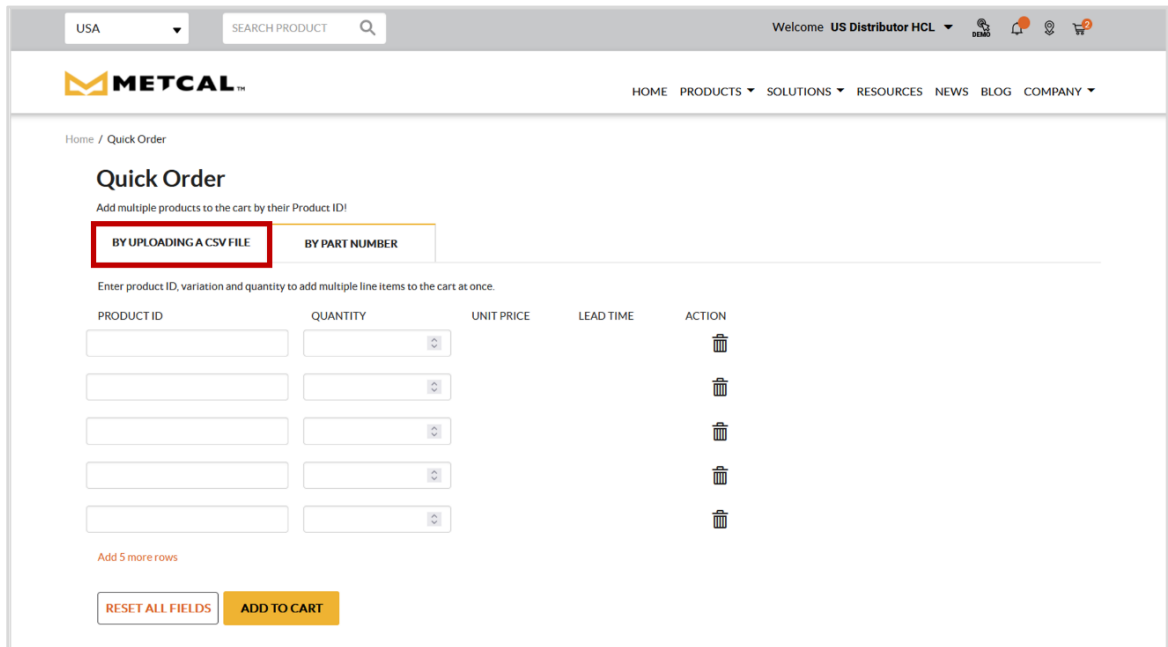
- 7.2. After clicking **Quick Order**, you will see the *Quick Order* page. Select the **By Part Number** tab to enter product IDs and quantities of each product, then **Add to Cart**.



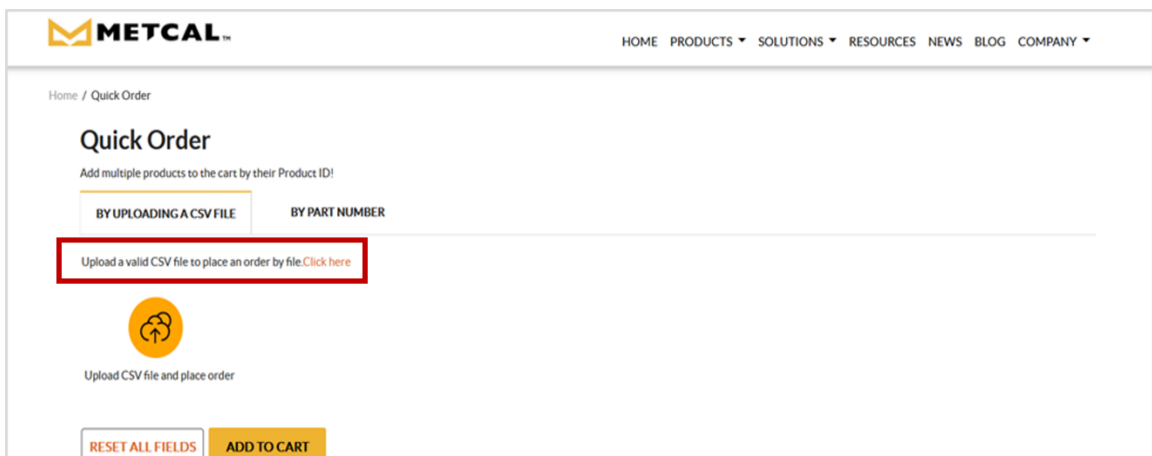
## Ordering by Importing a CSV File

Importing a file can save time when you are placing a large order.

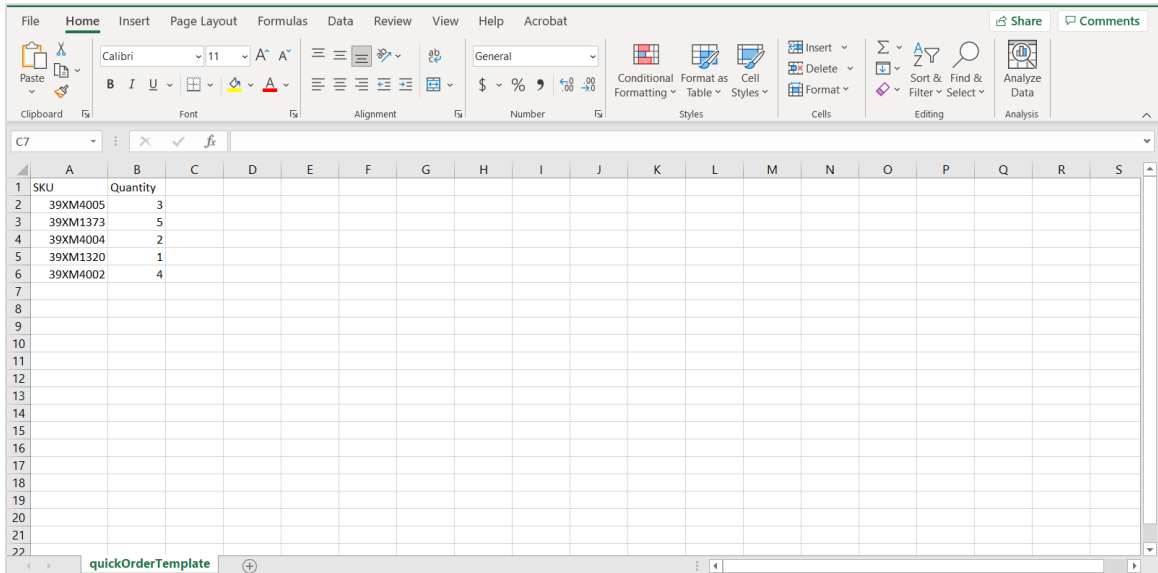
7.3. Navigate to the *Quick Order* page and click the **By Uploading A CSV File** tab.



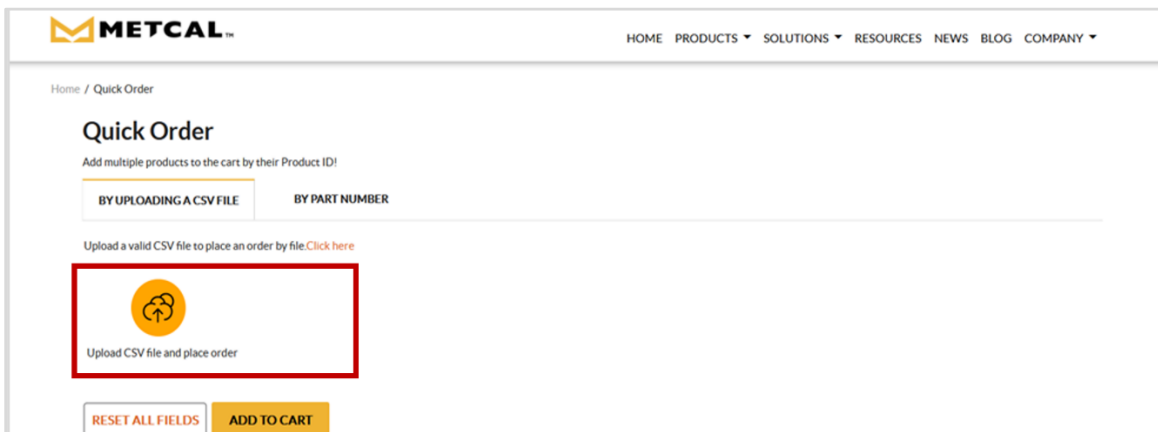
7.4. You can upload your own CSV file or use the website template. To download the template, click the **Upload a valid CSV file to place an order by file. Click here** link.



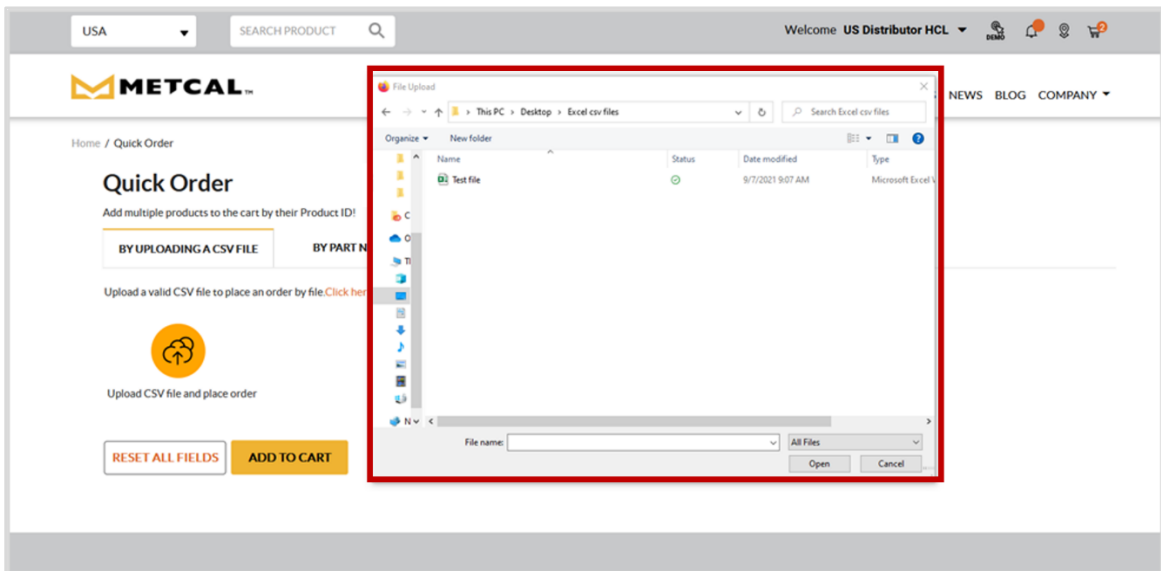
7.5. The CSV file template will look like the image below. **Important: Product ID or SKU codes must be typed in all caps for the file to be accepted during the upload.**



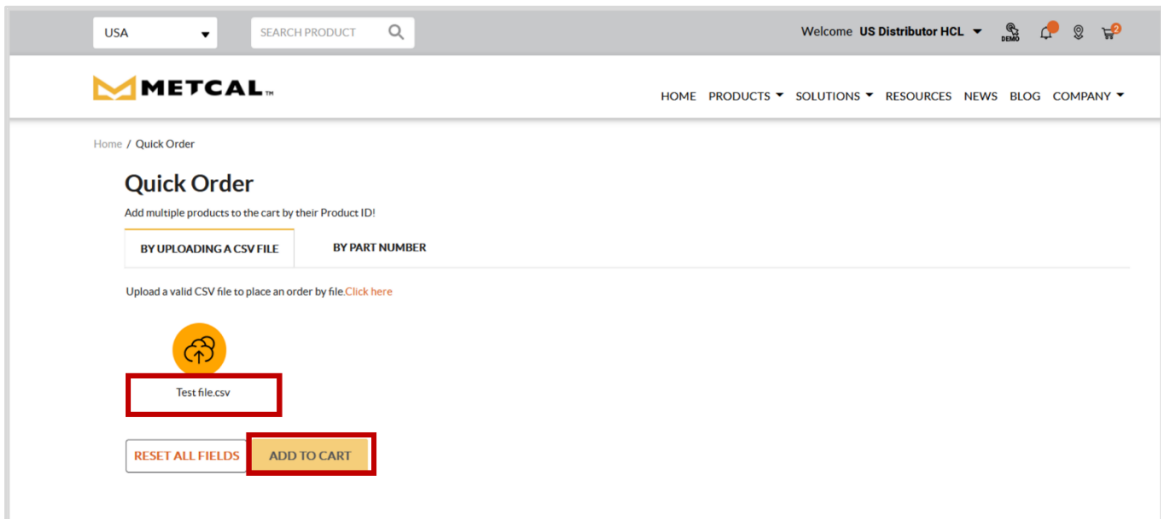
7.6. To upload your CSV file, click the *cloud icon* above **Upload CSV file and place order.**



7.7. From the window that appears, find the file you wish to upload, then click **Open**.



7.8. Your file name will appear below the cloud icon. Select **Add to Cart** to continue with your purchase.



We hope you found this guide useful. If you still have questions after reviewing the guide, please don't hesitate to reach out to us.

**Customer Service US:** [eorders@okinternational.com](mailto:eorders@okinternational.com)

**Customer Service EU/UK:** [europe-orders@okinternational.com](mailto:europe-orders@okinternational.com)

**OK International, Inc.**

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