



The Beacon Portal Handbook

About Westlock Controls

Welcome to Westlock Controls, where four decades of unwavering commitment have shaped us into pioneers of innovation in valve monitoring and control solutions. With a legacy rooted in our distinctive black and yellow colored beacon, our brand symbolizes not just visibility but a beacon of ingenuity since our founding in 1984.

Headquartered in Saddle Brook, NJ, our company thrives on a culture of excellence, where every product is thoughtfully designed for longevity and equip customers with meaningful diagnostics to ensure optimal operational performance.

At Westlock, we are more than innovators; we are groundbreakers, setting new standards with exceptional engineering and unwavering quality for the most critical applications. Beyond our commitment to industry leadership, we embrace philanthropy, sustainability, and equality, embodying values that extend far beyond our products.

Our Product Portfolio



Valve Monitoring

Select from limit switch sensing or more advanced 4-20mA position transmitters.



Valve Monitoring + Control

Add an integrated pilot valve, pre-wired to simplify your valve package.

APPLICATIONS

ON/OFF

CONTROL



Smart Positioners

Versatile control solution with touch-start auto-calibration, improved levels of reliability and easy to use interface.



Digital Positioners

Advanced positioner equipped with fieldbus protocols delivering enhanced diagnostics with actionable insights to keep your plant running.

Welcome to The Beacon Portal

Dear Valued Customer,

We are thrilled to introduce you to the Beacon Portal, our new customer portal designed to streamline your experience with our products and services. Welcome aboard!

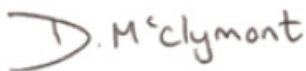
The Beacon Portal is a cutting-edge platform that offers a wide range of benefits, making it easier and more convenient for you to manage your day-to-day activities related to our products. Here are some key features and benefits you can expect to enjoy:

- **Easy Order Management:** With the Beacon Portal, you can place orders for our products quickly and efficiently, saving you time and effort.
- **Seamless Quote Generation:** Need a quote for a new project or product? The Beacon Portal allows you to generate quotes with just a few clicks, simplifying the process and speeding up decision-making.
- **Enhanced Customer Service:** Our portal provides access to a wealth of resources and information, ensuring that you have everything you need to address any questions or concerns you may have about our products and services. Plus, our dedicated customer support team is always available to assist you if you need additional assistance.
- **Personalized Experience:** The Beacon Portal is tailored to your specific needs and preferences, providing a personalized experience that puts you in control of your interactions with us.

We believe this platform will revolutionize your interaction with our company, offering the tools and resources you need to succeed. Our commitment is to ensure your experience is smooth and seamless.

Thank you for choosing Westlock Controls. We are excited to embark on this journey with you and look forward to helping you achieve your goals.

Best regards,



David McClymont
Vice President & General Manager

Resource Library: FAQ

General Questions

1. What is the Beacon Portal?

The Beacon Portal is designed to significantly enhance the ease of doing business by elevating information availability and streamlining order processing. This comprehensive platform offers seamless access to essential tools and resources, ensuring a more efficient and productive experience for our customers. With the Beacon Portal, you can expect improved visibility and management of orders, invoices, shipments, quotes, and support services, all in one user-friendly interface.

2. What features are available in the Beacon Portal?

The Beacon Portal provides comprehensive features to streamline your interactions with our company. You can process and approve WEB POs, view all processed orders, and communicate about delays directly. The portal also offers complete visibility of invoices and shipments, and facilitates seamless online quote requests, approvals, and deliveries. Additionally, it supports RMA processing, feedback submissions, and application and technical questions. For critical onsite support, tech visit requests can also be made online.

3. Can I access the Beacon Portal from the westlockcontrols.com website?

Yes, on the home page of the westlockcontrols.com website, there is a main banner featuring Wes the Beacon. Click on this banner, and it will open the login screen for the portal in a new tab.

4. Can I access the Beacon Portal from a mobile device?

The portal is currently not available for mobile devices due to its advanced features, which require a computer for optimal use.

Account Setup

1. How do I login to the Beacon Portal for the first time?

There will be one main user per company to initiate the set-up process into the portal. Main users will be identified through your Westlock Regional Sales Manager. The main user will be sent an email from the portal, with a master key to complete portal login.

2. Are multiple users allowed access into the Beacon Portal?

Yes, there can be an unlimited number of users registered within the portal. Registering additional users can be initiated by the main user if full name and email address is known.

3. What happens if I forget my password?

If you forget your password, simply click the "Forgot Password" button on the main login page. Follow the prompts to reset your password quickly and easily.

4. What happens if I need to update the account information for my company?

To update your company account information, please contact your Regional Sales Manager (RSM). For updating portal account access, reach out to Sammy Jebara at sjebara@westlockcontrols.com.

Resource Library: FAQ

Orders

1. How do I place an order through the Beacon Portal?

To place an order, navigate to the Web Orders section and select "Key in New PO." You'll then be able to complete the PO Request form and upload your purchase order.

2. Can I track the status of my orders in the portal?

Yes, you can track the status of your order in the portal. You'll be able to see when your order was placed and when it was processed by Westlock Inside Sales. Additionally, you can check if your order has been invoiced or if any shipper information is available. Westlock Controls also provides access to payment acknowledgments, credit memos, and debit memos for your convenience.

3. How do I communicate about order delays or issues?

We are committed to ensuring a smooth transaction with Westlock. If there are any issues with your order after it has been processed, our Inside Sales team will proactively reach out to you to address the situation.

Quotes

1. How do I request a quote?

To request a quote, navigate to the QuoteTrak section within the portal and click on "Enter a New Quote." You will be prompted to complete a form with the necessary details to generate your quote. Typically, quotes are returned within 24 business hours. You can track all pending quotes in the "Pending Approval" section. Once your quote is approved, you will receive an email with the quote attached as a PDF.

2. Can I communicate directly with the sales team about my quotes?

Yes, you can easily communicate with the sales team through the portal. Within each quote profile, there is an option to select "Mail & Docs," which allows you to send an email directly to inside sales.

3. How will I know when my quote is approved?

When a quote is approved by Westlock Controls, you will receive an email from the portal and also see the quote leaving "Pending Approval".

Invoices and Shipments

1. Where can I view my invoices and track my shipments?

Invoices and shipment tracking can be viewed by navigating to the Docutrak tab within the portal. Inside of Docutrak you can select any invoice from your account and track all shipments.

2. Can I download copies of my invoices and shipment details?

Yes, downloadable copies of invoices and shipment details are available from the portal into MS Excel.

Resource Library: FAQ

Support

1. How do I submit an RMA request?

To submit an RMA request, go to the eSupport tab within the portal. Select "Return," then click on "Create New" and fill out the form. Inside sales will review your request, and if additional information is needed, they will reach out to you. Once the request is forwarded to Quality Control (QC) for approval, you'll receive confirmation to return the product.

2. What are the available feedback options?

If you have any feedback to share with Westlock Controls, navigate to the eSupport tab within the portal. Select "Feedback", then "Create New". Please fill out the form.

3. Where can I find application and technical support?

If you are in need of technical support, navigate to the eSupport tab within the portal. Select "Technical Support", then "Create New" and fill out the form.

4. Who can I contact for assistance with using the portal?

For support related to the portal, please reach out to Sammy Jebara, Sales Analyst at PortalSupport@westlockcontrols.com

Security

1. How is my data protected in the Beacon Portal?

We prioritize your data privacy. The Beacon Portal handles your personal data in full compliance with privacy regulations, covering all aspects from collection to secure storage and processing. We implement strong security measures, such as encryption and access controls, to safeguard your information at every step.

2. What security measures are in place to ensure my information is safe?

Your data is safeguarded with advanced encryption, secure access protocols, and continuous monitoring. We use encryption both in transit and at rest to prevent unauthorized access. Our team actively monitors our systems for potential threats and vulnerabilities, and we regularly update our security measures to counter new and emerging risks. Please view the Crane Co privacy statement (<https://www.craneco.com/privacy-statement/>)

3. Can I manage user permissions and access levels for my team?

Admin users can limit a team member on the quantity of Buy Locations they can access information from.

Resource Library: Video Tutorials

To further support your learning, we have prepared a series of pre-recorded video tutorials. These tutorials cover key aspects of the portal, from setting up your account to mastering advanced features. They are available for you to watch at your convenience, offering a visual and practical approach to understanding the portal's capabilities.

To access these video files, please visit the Info Center tab within the portal.

Video Title	Description
Overview of The Beacon Portal	Learn how The Beacon Portal streamlines operations, improves efficiency, and empowers you with the data-driven insights needed to optimize performance.
Quote Basket: Create	Learn how to effortlessly create a Quote Basket within The Beacon Portal. This quick tutorial guides you through the simple steps to compile a personalized quote basket for easy reference and streamlined purchasing.
Esupport: Feedback	This video walks you through the process of creating a feedback inquiry within The Beacon Portal. Learn how to submit your questions, suggestions, or concerns directly through the portal, ensuring your feedback reaches the right team quickly.
Esupport: Tech Question	In this video, you'll learn how to create a tech question within The Beacon Portal. Follow simple steps to submit your product technical inquiries, ensuring they reach our expert team for prompt and accurate support.
Esupport: Tech Visit Request	Learn how to easily request an on-site technical visit through our streamlined process. This video guides you step-by-step on submitting a tech visit request for a live, in-person consultation at your location.
Esupport: RMA	Watch this video to discover how to create and submit a return request through The Beacon Portal. We'll guide you through the easy steps to initiate a return, provide necessary details, and track your request.
Esupport: Application Support	Discover how to submit an application support inquiry to find the ideal product for your needs. This video walks you through the process of requesting expert assistance to ensure you select the best solution tailored to your application requirements.
Web Orders: Upload New PO	This video walks you through the process of creating and submitting a new purchase order in The Beacon Portal. Learn how to enter order details, submit your purchase, and track updates on purchase orders in progress.
QuoteTrak: New Quote	This video tutorial shows you how to create a new quote inquiry within The Beacon Portal. Learn how to enter your product requirements, submit your request, and receive tailored quotes quickly.
CCAR: Customer Action Report	In this video, you'll learn how to create a customer action report and view open reports within The Beacon Portal. Follow our step-by-step guide to generate detailed action reports and easily access and manage your ongoing reports.
INFO Center: Library	Learn how to assemble and share a comprehensive package of product specifications and technical documentation with your customers. This video demonstrates how to compile relevant resources into a shareable format and provide a direct link for easy access.



WESTLOCK
CONTROLS