

## How to Create a New User on MyPEI - Customer Process

### 1. Objective

Explain how to create new user on MyPEI

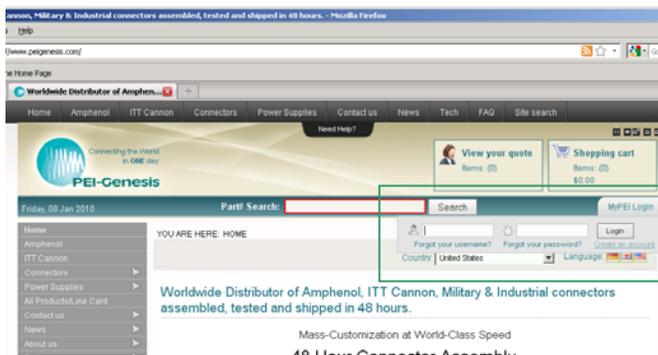
### 2. Departments

External customers.

### 3. Procedure

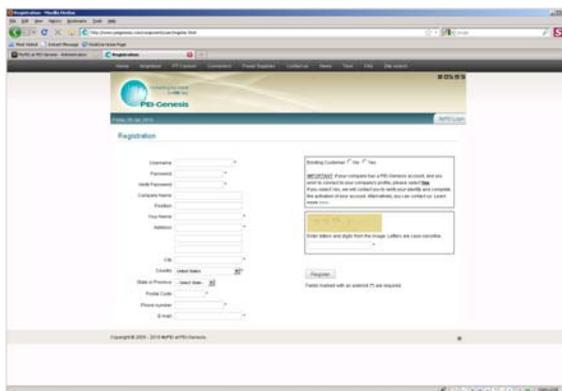
#### 3.1. Customer Process

- 3.1.1. Have the customer open the website [www.peigenesis.com](http://www.peigenesis.com). Click on "MyPEI Login" at the top right of any page on the site.



1 Click on **MyPEI Login**.  
Choose **Create an Account**

- 3.1.2. This opens the Registration screen. Proceed as follows:



3.1.3. Left Side of Registration screen:

## Registration

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1 Create a **username** and password.

2 Enter the remaining information including your Name, Address, phone number and email address.

3 Optional comment.

Username: SabrinaJohn \*

Password: ..... \*

Verify Password: ..... \*

Company Name: ABC Electronic systems

Position: Buyer

Your Name: Sabrina John \*

Address: 112 Main Street \*

City: Philadelphia \*

Country: United States \*

State or Province: Pennsylvania

Postal Code: 19116 \*

Phone number: 2166734500 \*

E-mail: sabrina@ABCelex.com \*

Comments: I normally deal with Eric in the Philadelphia office.

### 3.1.4. Right Side of Registration Screen.

The screenshot shows the right side of the registration screen. At the top right is a 'MyPEI Login' button. Below it is a section for 'Existing Customer' with radio buttons for 'No' (selected) and 'Yes'. A callout box labeled '4' points to this section, containing the text: 'To create your own individual account, set **Existing Customer** = No. If you wish to be connected to your existing PEI open account, select Yes and answer the additional questions in the drop-down (see next page – step 3.1.6 for this screen)'. Below the radio buttons is an 'IMPORTANT' notice: 'If your company has a PEI-Genesis account, and you wish to connect to your company's profile, please select **Yes**. If you select Yes, we will contact you to verify your identity and complete the activation of your account. Alternatively, you can contact us. Learn more [here](#).' Below this is a security captcha image showing the letters 'SHST' and a callout box labeled '5' pointing to it, containing the text: 'Enter the hidden numbers and letters from the security capsha image into the box.' Below the image is a text input field containing 'SHST' and an asterisk, with a callout box labeled '6' pointing to it, containing the text: 'Hit Register'. At the bottom left is a 'Register' button, also pointed to by callout '6'. A note at the bottom states: 'Fields marked with an asterisk (\*) are required.'

### 3.1.5. The Sign On screen appears. Log in using your new username and password.

The screenshot shows the PEI-Genesis website's sign-on page. The top navigation bar includes links for Home, Amplifier, ITT Cannon, Connectors, Power Supplies, Contact us, News, Tech, FAQ, and Site search. The main header features the PEI-Genesis logo with the tagline 'Connecting the World in ONE day'. On the right, there are links for 'View your quote' (Items: 0) and 'Shopping cart' (Items: 0, \$0.00). Below the header is a search bar with 'Part# Search:' and a 'Search' button, and a 'MyPEI Login' button. A message says 'You may now Login.' The 'Sign On' section contains fields for 'Username' and 'Password', and a 'Sign On' button. At the bottom, there are links for 'Forgot your Password?', 'Forgot your Username?', and 'Register'.

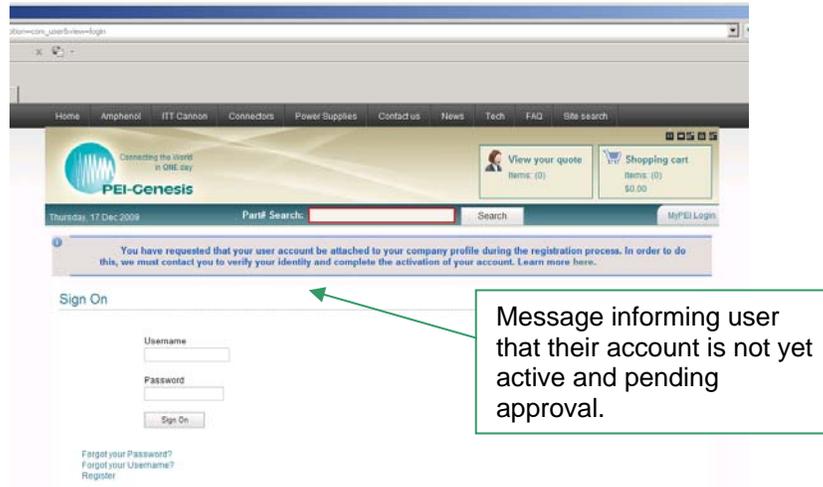
3.1.6. Existing Customer = Yes right screen drop-down. See the next page (Section 3.2) for complete details about each of the fields in the drop down.

The screenshot shows a registration form with the following fields and instructions:

- 4** Existing Customer:  No  Yes. To attach your profile to your company's existing PEI open account, select Existing Customer = **Yes**.
- 5** Customer: ZP856910. Enter your PEI Customer number (if known), otherwise enter UNKNOWN.
- 6** Authority Level:  View Special Pricing,  View Orders/Invoices, Track Shipments,  Buy (Credit Card),  Buy (Terms). Enter the level of authority you want. Higher levels include all authorities of lower levels.
- 7** Authorized By: Joe Smith. Enter the name of the (manager) at your company that approved this authority level.
- 8** Certify:  Check to verify accuracy of this information. Certify that the above information is true.
- 9** Security image: SHST. Enter letters and digits from the image. Letters are case-sensitive. Enter the hidden numbers and letters from the security capsha image into the box.
- 10** Register. Hit Register.

Fields marked with an asterisk (\*) are required.

3.1.7. The sign-on screen will appear with a message informing the user that their account is **NOT yet activated**. This is because we must verify that this individual is truly allowed access to the company account. They will not be able to log on until approved.



3.1.8. An email is automatically sent to the local PEI-Genesis Branch Manager for user verification based upon the customer's address. WI 400.1.1.0 details our internal approval process.

3.1.9. An email similar to the one below is sent to the new user at the email address they provided informing them that their new account was created and explaining the verification delay.

Hello [new user]:

Thank you for registering at MyPEI at PEI-Genesis.com.

If you selected the existing customer flag when you registered, your user account is pending activation. We will contact you at the phone number you entered during registration to verify the connection to your company account. If you like, you can contact us. Read more here [www.peigenesis.com/existing-customer-registration](http://www.peigenesis.com/existing-customer-registration)

Otherwise your account is now activated and you may Login to [www.peigenesis.com](http://www.peigenesis.com) using the username and password you registered.

MyPEI has lots of features. To get a good start, have a look at our FAQ page [www.peigenesis.com/FAQ](http://www.peigenesis.com/FAQ)

Everyone here at PEI-Genesis is eager to delight you. Contact us if you need any assistance or just to say hello. [www.peigenesis.com/customer-service/contact-us](http://www.peigenesis.com/customer-service/contact-us)

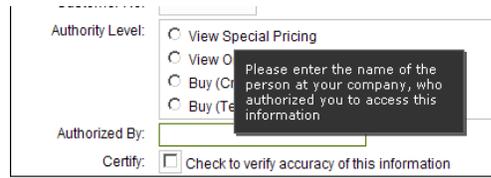
Warm Regards,  
The PEI Family

3.1.10. The first time the User logs on to the site they must agree to the website Terms and Conditions.

3.1.11. Enjoy MyPEI!

### 3.2. Some Additional details about setting Existing Customer = Yes

3.2.1. The following fields appear in the drop-down. Notice that if you point to the field, a pop-up comment window provides an explanation of the field. In the example below the cursor is over the "Authorized By" field:



3.2.2. **Customer No.** – Enter the PEI ASW Customer Number or UNKNOWN. The customer probably has this number in their system from our prior invoices, Sales order Confirmations, etc. If you are walking the customer through the setup you can give them their ASW customer ID. If you leave this field blank or enter an invalid ASW customer number an error message will be shown. Example:

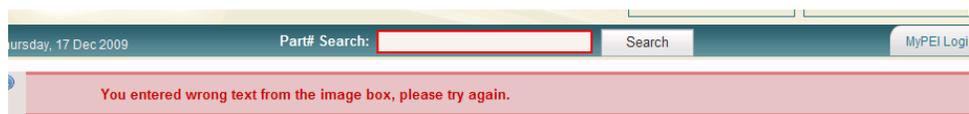


3.2.3. **Authority Level** – This is the requested access level. We are very careful when approving the highest level "Buy (terms)" because once approved, this will allow the person to place orders on their company open account and have PEI bill the company for their purchases. PEI Employees, see WI 400.1.1.0 for details.

3.2.4. **Authorized By:** The name of the manager at the customer company that is allowing this individual to have the requested level of authority (if the individual is a senior manager, it is possible that they might self-authorize and enter their own name here).

3.2.5. **"Certify"** – Check to indicate that the information provided is true and correct.

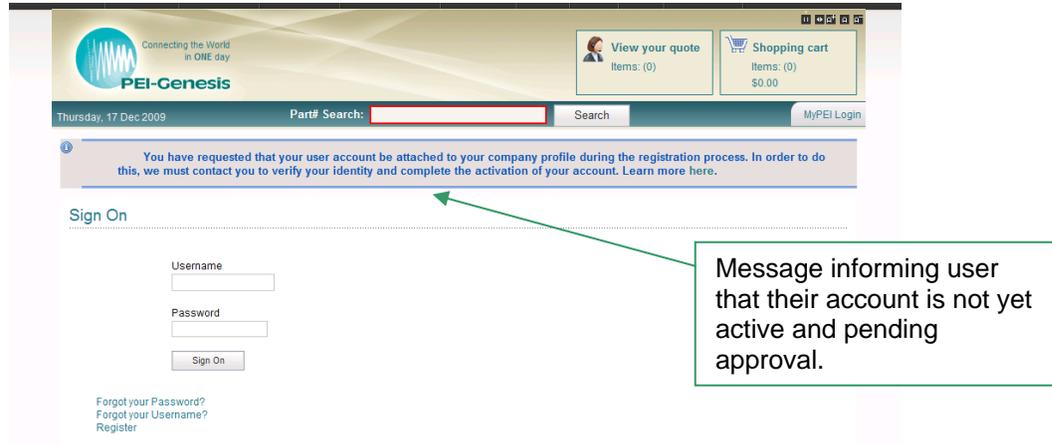
3.2.6. Enter the numbers and letters from the security capsha image. This image is intentionally difficult to read, but if you mistype, the system will display an error message and provide a new capsha image.



[Registration](#)

3.2.7. Hit the Register button. The sign-on Screen will appear with a message informing the user that their account is NOT yet activated. This is because our

Inside Salesperson must verify that this individual is truly allowed access to the company account. They will not be able to log on until approved.



3.2.8. An email is sent to the PEI Branch Manager based upon the customer's address for verification. The Branch manager will contact the customer at the phone number provided during registration.

End of Procedure 400.1.1.1.

