WYVERN DM MEMBERSHIP MANAGEMENT

System Functionality & User Guide – Version 2.0
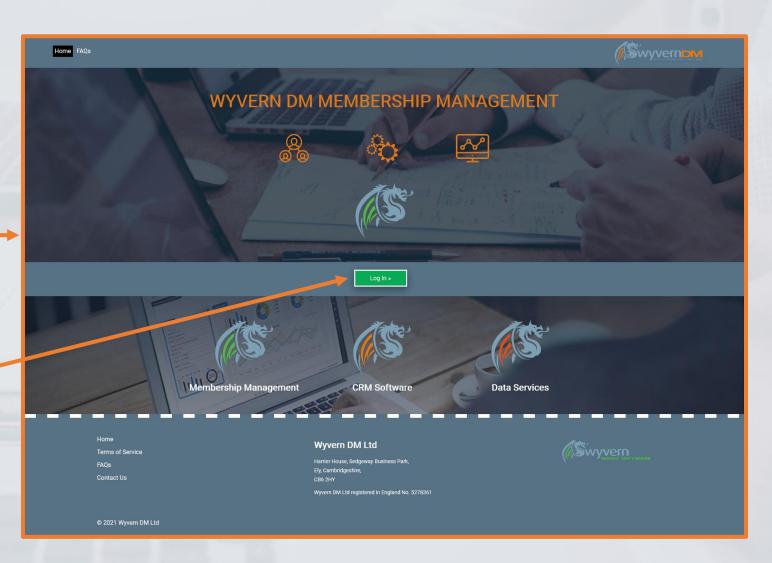
System Access

Wyvern DM Membership Management System URL:

https://wyvernsubs[xxxxxx].wyvernhost1.co.uk/

Upon accessing the URL above, you will be presented with the Home Page of the Wyvern DM Membership Management System.

To proceed with accessing features and functionality of the system, Click the *Log In* button.
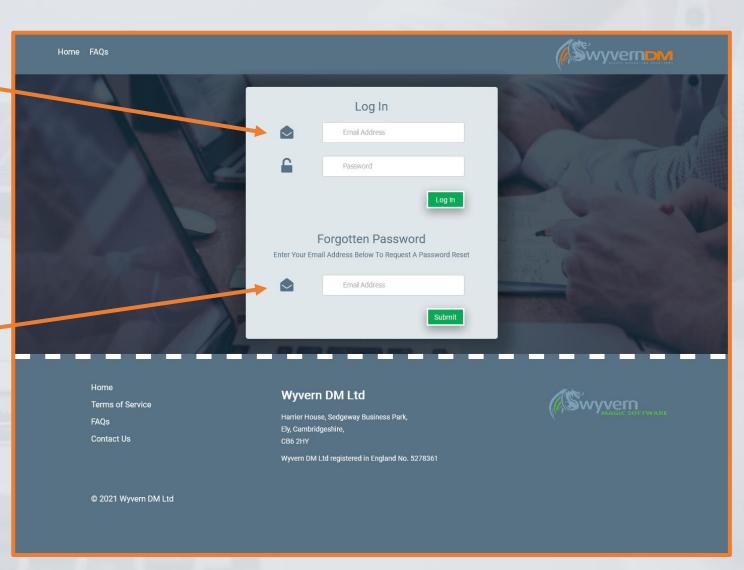
System Access – Logging In

To Log In, enter the Email Address and Password that are associated with your User Account.

Click **Log In** to proceed.

If you would like to reset you User Account Password, enter the Email Address that is associated with your User Account here.

Click the **Submit** to proceed – this will send a Password Reset Email to your Email Address, allowing you to reset your password.
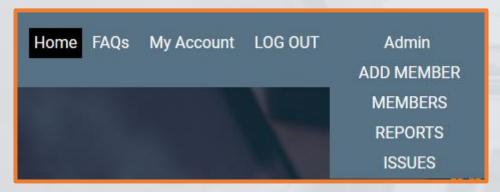
System Access – Access Levels

Upon successfully logging in, a newly displayed Menu Bar will become available.

The Menu Options displayed will depend on your User Account Access Level:

- **Group Managers** can use the **My Account** Option

- **Admin Users** can use the **Admin** Option

Hovering over the Admin Menu will display further options available (full details overpage):

Admin – Menu Options

Hovering over the Admin Menu will display further options available – a breakdown and explanation of these can be found below:

- **Add Member**
  - The Add Member functionality should be used to Add a New Group Manager to the system – these are users that are responsible and able to manage Group Subscriptions (E.G. Enterprise Subscriptions).

- **Members**
  - The Members functionality is the main management suite of tools available to manage members held within the Membership System. This includes the ability to manage Subscriptions, Data, Transactions, Invoices and Demographics.

- **Reports**
  - The Reports functionality allows a range of reports to be run against the data held within the Membership Management System.

- **Issues**
  - The Issues functionality allows the management and set-up of Issue Runs.

Admin – Add Member

Upon clicking the **Add Member** option in the Admin Menu Drop-Down, you will be presented with the following screen.
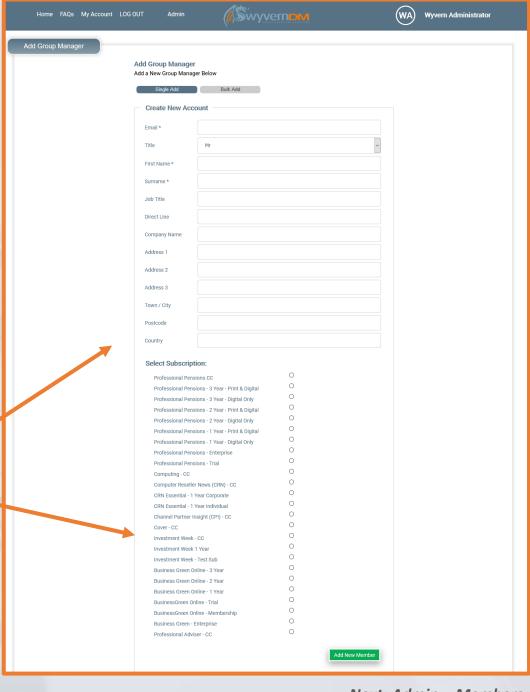
This screen is specifically used for adding new **Group Managers**, who are users that are responsible and able to manage Group Subscriptions (E.G. **Enterprise Subscriptions**).

Once created, Group Managers are able to Log In, and Manage their Group Users under the **My Account** Menu Option.

To **Add a New Group Manager**, complete the following fields for this user.

Next, select a **Subscription** which this Group Manager will be managing.

Finally, click **Add New Member** to complete this process.

Admin – Members
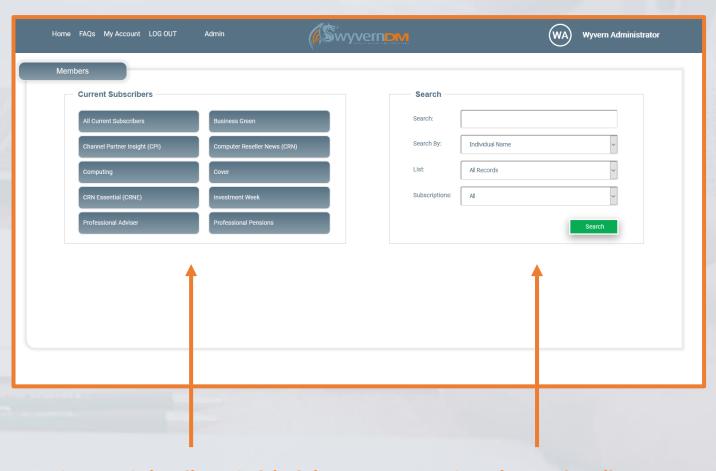
Upon clicking the **Members** option in the Admin Menu Drop-Down, you will be presented with the following screen.

On the left hand side of the screen, the **Current Subscribers Quick Links** are available for your convenience of efficiently viewing all Current Subscribers with a specific subscription.

On the right hand side of the screen, the **Search** functionality allows you to search the Membership Management System based upon a range of search criteria:

- Individual Name

- Organisation Name

- Email Address

- Subscriber ID

You are also able to search for *Deleted* or *Favourited Users* under the **List** Drop Down Box.

Current Subscribers Quick Links

Search Functionality

Admin – View Members

Upon selecting a **Current Subscribers Quick Link**, or performing a **Search**, you will be presented with your search results as below.

Member Data

Quick Search Functionality

Download

Clicking on the icons on the right hand side of the screen allow for further functionality to be explored for each individual member.

Add Favourite

View Subscriptions

View Member Details

Send Password Reset Email
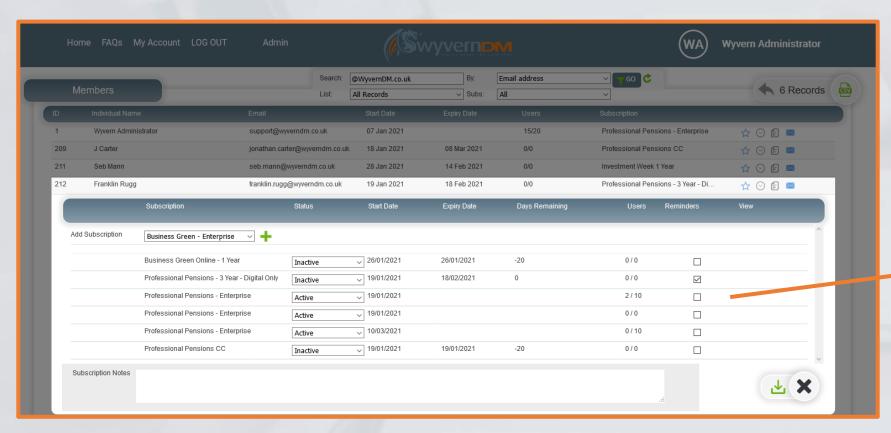
Next: Admin – Members – View Subscriptions
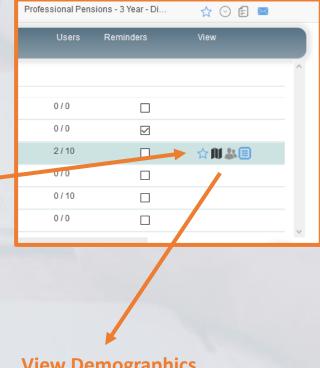
Admin – View Subscriptions
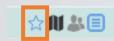
Upon clicking on the View Subscription button, the Member's Subscriptions will be displayed

Hovering over a specific Subscription will then display further options

Add Favourite

Manage Transactions

Manage Group Users

View Demographics
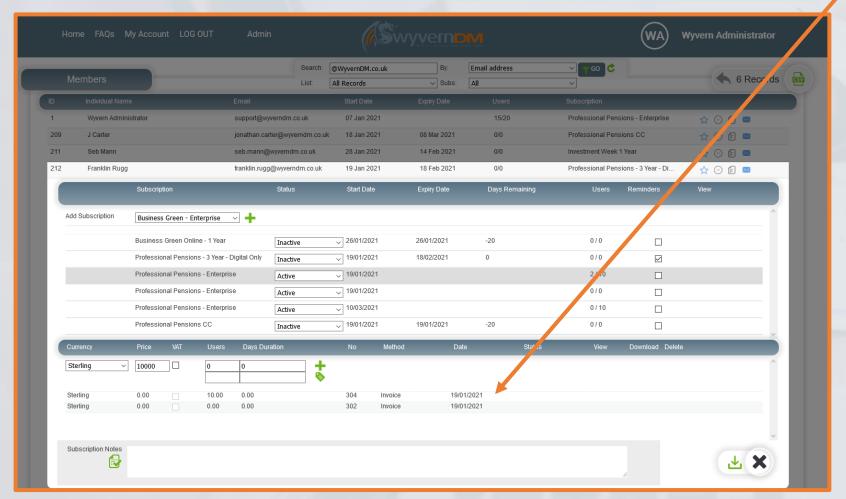
Next: Admin – Manage Transactions

Admin – Manage Transactions

Upon clicking on the Manage Transactions button, the Member's Transactions will be displayed

To **Add an Invoice** to a Subscription, confirm the Price & Duration, and Click the **Add Invoice** Icon. An Invoice Preview will then be displayed.
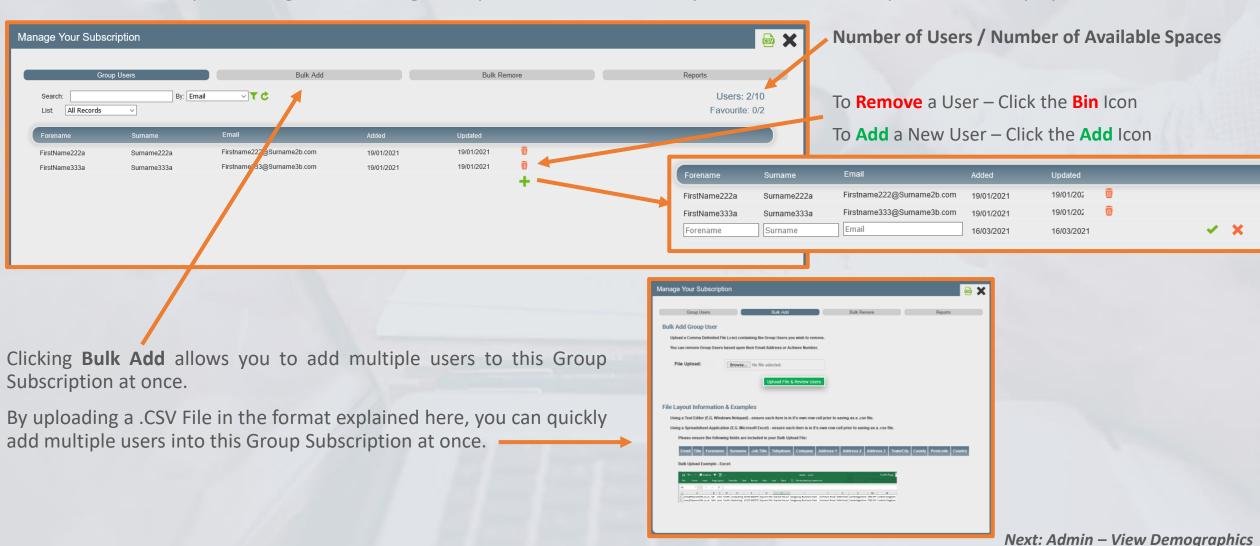
To **Add Group Users** to a Group Subscription, Enter The Amount Required in the Users Column, and Click the **Add Free Duration** Icon

Admin – Manage Group Users

Upon clicking on the Manage Group Users button, the Group User's of this Subscription will be displayed

Number of Users / Number of Available Spaces

To **Remove** a User – Click the **Bin** Icon

To **Add** a New User – Click the **Add** Icon

Clicking **Bulk Add** allows you to add multiple users to this Group Subscription at once.

By uploading a .CSV File in the format explained here, you can quickly add multiple users into this Group Subscription at once.
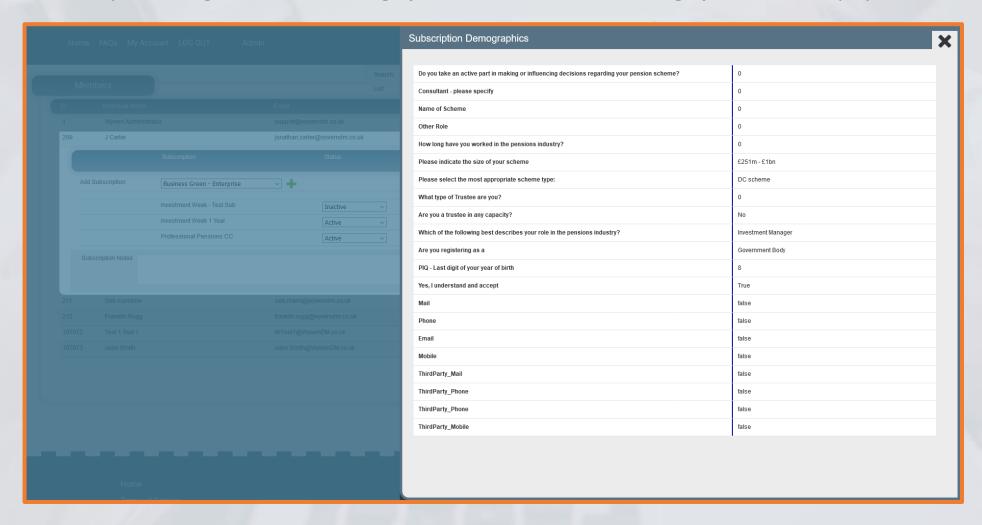
Admin – View Demographics

Upon clicking on the **View Demographics** button, the **User's Demographics** will be displayed
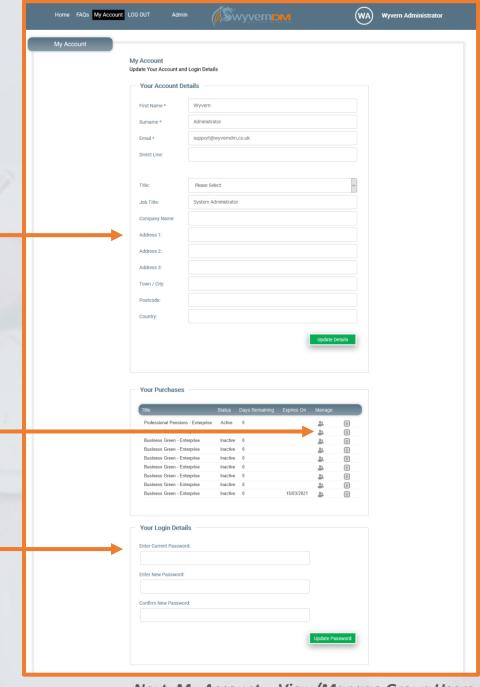
Admin – My Account

Upon clicking the **My Account** option in the Menu Bar, you will be presented with the following screen, which is specifically used by **Group Managers**.

To amend Your Account Details, use the following form, and click **Update Details**

Group Managers are able to View and Manage the Group Subscriptions they are a Manager of in this area titled **Your Purchases**.

View / Manage Group Users

View Transactions

To Update Your Login Details, use the following form, and click **Update Password**

Admin - Manage Group Users

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Upon clicking on the Manage Group Users button, the Group User's of this Subscription will be displayed

Manage Your Subscription

| Group Users | Bulk Add | Reports |

Group users

Search: [ ] By: Email ▼
List: [All Records ▼]   Users:3/5

Forename	Surname	Email	Added	Updated	
Firstname	Surname	Test1@WyvernDM.co.uk	17/03/2021	17/03/20	🗑
Firstname	Surname	Test2@WyvernDM.co.uk	17/03/2021	17/03/20	🗑
Firstname	Surname	Test3@WyvernDM.co.uk	17/03/2021	17/03/20	🗑
					➕

Number of Users / Number of Available Spaces

To **Remove** a User – Click the **Bin** Icon

To **Add** a New User – Click the **Add** Icon

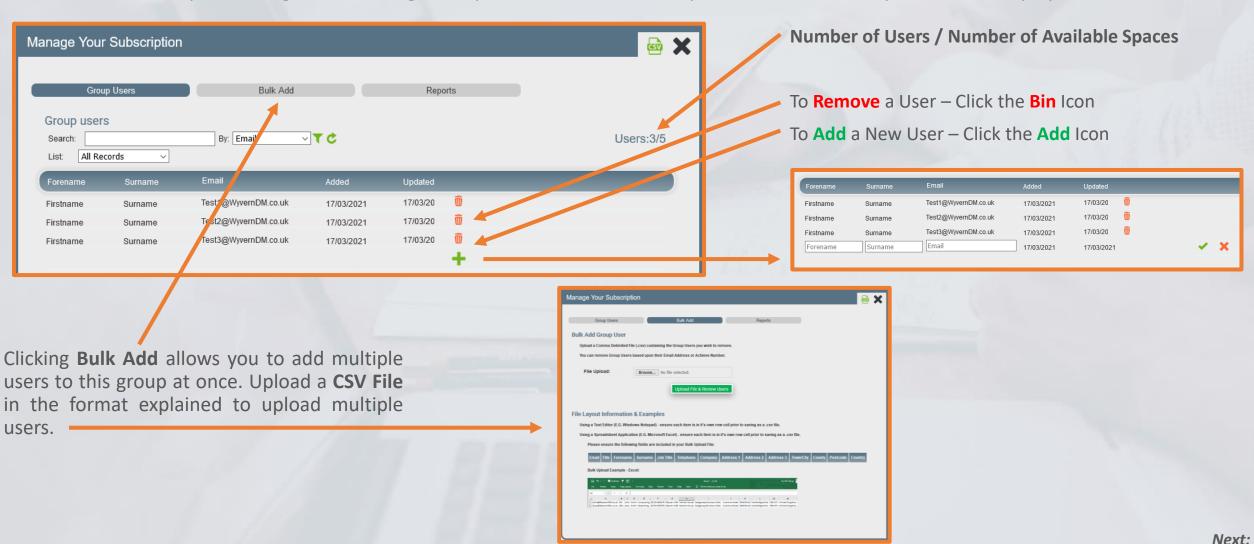| Forename	Surname	Email	Added	Updated	
Firstname	Surname	Test1@WyvernDM.co.uk	17/03/2021	17/03/20	🗑
Firstname	Surname	Test2@WyvernDM.co.uk	17/03/2021	17/03/20	🗑
Firstname	Surname	Test3@WyvernDM.co.uk	17/03/2021	17/03/20	🗑
Forename	Surname	Email	17/03/2021	17/03/2021	✓ ✗

Clicking **Bulk Add** allows you to add multiple users to this group at once. Upload a **CSV File** in the format explained to upload multiple users.

Manage Your Subscription

| Group Users | Bulk Add | Reports |

Bulk Add Group User

Upload a Comma Delimited File (.csv) containing the Group Users you wish to remove.

You can remove Group Users based upon their Email Address or Achieve Number.

File Upload: [Browse...] No file selected.

[Upload File & Review Users]

File Layout Information & Examples

Using a Text Editor (E.G. Windows Notepad) - ensure each item is in it's own row cell prior to saving as a .csv file.

Using a Spreadsheet Application (E.G. Microsoft Excel) - ensure each item is in it's own row cell prior to saving as a .csv file.

Please ensure the following fields are included in your Bulk Upload File:

| Email | Title | Forename | Surname | Job Title | Telephone | Company | Address 1 | Address 2 | Address 3 | Town/City | County | Postcode | Country |

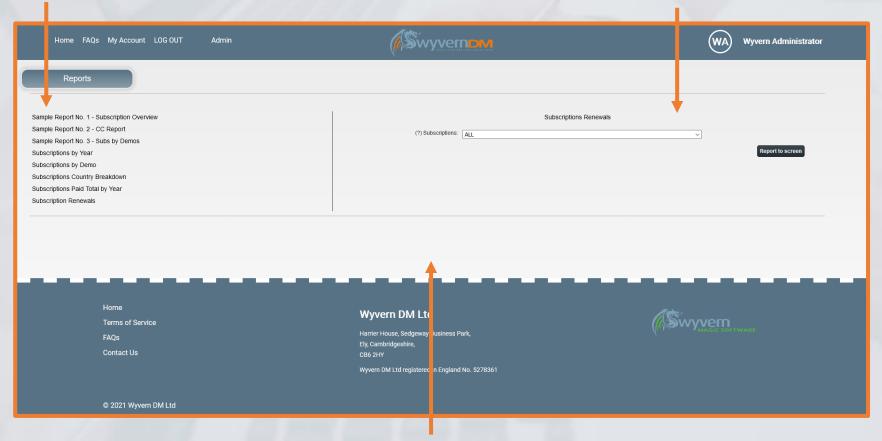**Bulk Upload Example - Excel**

Next:

Admin - Reports

Upon clicking on the Reports Option in the Admin Menu Drop Down, a series of reports are visible to use

Click to select the **Report** you wish to view from this list.

Choose Report Parameters and press **Report To Screen** to view your report.

Report results will be displayed here