

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):





CRM Software

Membership Management

Data Services

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.

My Account LOG	OUT Admin	wyvernow	WA Wyvern Administr	rator
er				
	Add Group Manager			
	Add a New Group Manager Below Single Add Bulk Add	1		
	Create New Account			
	Email *			
	Title Mr		~	
	First Name *			
	Surname *			
	Job Title			
	Direct Line			
	Company Name			
	Address 1			
	Address 2			
	Address 3			
	Town / City			
	Postcode			
-	Country			
	Select Subscription:			
	Professional Pensions CC	0		
	Professional Pensions - 3 Year - Print	& Digital		
	Professional Pensions - 3 Year - Digita			
	Professional Pensions - 2 Year - Print	-		
	Professional Pensions - 2 Year - Digita			
	Professional Pensions - 1 Year - Print	a Digital		
	Professional Pensions - 1 Year - Digita	al Only		
	Professional Pensions - Enterprise	0		
	Professional Pensions - Trial	0		
	Computing - CC	õ		
	Computer Reseller News (CRN) - CC	0		
	CRN Essential - 1 Year Corporate	0		
	CRN Essential - 1 Year Individual	0		
	Channel Partner Insight (CPI) - CC	0		
	Cover - CC	0		
_	Investment Week - CC	0		
	Investment Week 1 Year	0		
	Investment Week - Test Sub	õ		
	Business Green Online - 3 Year	0		
	Business Green Online - 2 Year	0		
	Business Green Online - 1 Year	0		
	BusinessGreen Online - Trial	ê		
	BusinessGreen Online - Membership			
	Business Green - Enterprise Professional Adviser - CC	0		

Add Gro

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.



Next: Admin – View Members

Admin – View Members



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

Membe	er Data		Quick Se	arch Funct	tionality		Downloa
Home	FAQs My Account LOG OUT	Admin	(AST	vyverno	M	ŴA	Wyvern Administrator
Men	niers		@WyvernDM.co.uk All Records	By:	Email address All	✓ ((C) ((((((((((6 Records
ID	Individual Name	Email	Start Date	Expiry Date	Users	Subscription	
1	Wyvern Administrator	support@wyverndm.co.uk	07 Jan 2021		15/20	Professional Pensions - Enterprise	☆ ⊙ 🗊 🖂
209	J Carter	jonathan.carter@wyverndm.co.uk	18 Jan 2021	08 Mar 2021	0/0	Professional Pensions CC	☆ ⊙ 🗊 🖂
211	Seb Mann	seb.mann@wyverndm.co.uk	28 Jan 2021	14 Feb 2021	0/0	Investment Week 1 Year	☆ ⊙ 🗊 🖂
212	Franklin Rugg	franklin.rugg@wyverndm.co.uk	19 Jan 2021	18 Feb 2021	0/0	Professional Pensions - 3 Year - Di	☆ ⊙ 🗊 🖂
107072	Test 1 Test 1	MrTest1@WyvernDM.co.uk	02 Mar 2021	02 Mar 2021	0/0	Professional Pensions - Enterprise	☆ ⊙ 🗊 🖂
107073	John Smith	John.Smith@WyvernDM.co.uk			0/0		☆ ⊙ 🗊 🖂
							

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



Next: Admin – Members – View Subscriptions

Admin – View Subscriptions



Upon clicking on the View Subscription button, the Member's Subscriptions will be displayed

Members		List:	II Records	V Subs:	All	~		6 Records	
Wyvern Admin	istrator supp	ort@wyverndm.co.uk	07 Jan 2021		15/20	Professional Pens	ions - Enterprise	☆ ⊙ 🗊 🔤	
9 J Carter	jonati	nan.carter@wyverndm.co.uk	18 Jan 2021	08 Mar 2021	0/0	Professional Pens	ions CC	☆ ⊙ 🕫 🔤	
1 Seb Mann	seb.n	nann@wyverndm.co.uk	28 Jan 2021	14 Feb 2021	0/0	Investment Week 1	Year	☆ ⊙ 💼 🔤	
2 Franklin Rugg	ı frankl	in.rugg@wyverndm.co.uk	19 Jan 2021	18 Feb 2021	0/0	Professional Pens	ions - 3 Year - Di	☆ ⊙ 🗈 🖂	
	Subscription	Status	Start Date	Expiry Date	Days Remaining	Users	Reminders	View	
	Business Green - Enterprise V Business Green Online - 1 Year Professional Pensions - 3 Year - Digital O Professional Pensions - Enterprise Professional Pensions - Enterprise Professional Pensions - Enterprise Professional Pensions - Enterprise	Inactive Only Inactive Active Active Active	 26/01/2021 19/01/2021 19/01/2021 19/01/2021 10/03/2021 10/03/2021 19/01/2021 	26/01/2021 18/02/2021 19/01/2021	-20 0 -20	0/0 0/0 2/10 0/0 0/10 0/0			
Subscription Notes	Froessional Fensions CC	Inactive	1310 112021	19/01/2021	-20	070		بر X	

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Hovering over a specific Subscription will then display further options



Next: Admin – Manage Transactions

Admin – Manage Transactions



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

N	1embers				@WyvernDM.co.uk All Records	By: Subs:	Email address	✓ 4 co ¢		6 Recr. 0	ds 🗟
,	Individual Name	e	Email		Start Date	Expiry Date	Users	Subscription	_		
I	Wyvern Admini	strator	support@v	yverndm.co.uk	07 Jan 2021		15/20	Professional Pension	s - Enterprise	☆ ⊙ 💋 🔤	
209	J Carter		jonathan.ca	arter@wyverndm.co.uk	18 Jan 2021	08 Mar 2021	0/0	Professional Pension	s CC	☆ 💋 🗊 🔤	
211	Seb Mann		seb.mann(gwyverndm.co.uk	28 Jan 2021	14 Feb 2021	0/0	Investment Week 1 Ye	ar	/ 🕑 🗊 📼	
212	Franklin Rugg		franklin.rug	g@wyverndm.co.uk	19 Jan 2021	18 Feb 2021	0/0	Professional Pension:	s - 3 Year - Di	☆ ⊙ 🗈 🖂	
		Subscription		Status	Start Date	Expiry Date	Days Remaining	Users R	teminders	View	
Ad	ld Subscription	Business Green - Ente	erprise 🗸 🕂								^
		Business Green Online	e - 1 Year	Inactive	~ 26/01/2021	26/01/2021	-20	0/0			
		Professional Pensions	- 3 Year - Digital Only	Inactive	v 19/01/2021	18/02/2021	0	0/0			
		Professional Pensions	- Enterprise	Active	√ 19/01/2021			2110			
		Professional Pensions	- Enterprise	Active	v 19/01/2021			0/0			
		Professional Pensions	- Enterprise	Active	v 10/03/2021			0/10			
		Professional Pensions	СС	Inactive	√ 19/01/2021	19/01/2021	-20	0/0			
C	urrency	Price VAT	Users Days Du	ration	No Metho	od Da	te Star,s	View [Download Delete		
S	terling ~	10000	0 0								^
				>							
	terling	0.00	10.00 0.00		304 Invoice	a 19/0	1/2021				

To **Add an Invoice** to a Subscription, confirm the Price & Duration, and Click the **Add Invoice** Icon. An Invoice Preview will then be displayed.

Currency	Price	VAT	Users	Days Duration	Add Invoice
Sterling ~	10000] 🗆	0	365	+ ⊗



To **Add Group Users** to a Group Subscription, Enter The Amount Required in the Users Column, and Click the **Add Free Duration** Icon

Users	Days Duration	No Method
0	0	Add free duration
10		- 🔊

Next: Admin – Manage Group Users

Admin – Manage Group Users



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

Manage Your Subscription	🗟 🗙 🖉 Number of Users / Number of Available Spaces
Group Users Bulk Add Bulk Remove Search: By: Email Image: Complex Comple	Reports Users: 2/10 Favourite: 0/2 To Remove a User – Click the Bin Icon To Add a New User – Click the Add Icon
FirstName333a Surname333a Firstname/33@Surname3b.com 19/01/2021 19/01/2021	ForenameSurnameEmailAddedUpdatedFirstName222aSurname222aFirstname222@Surname2b.com19/01/202119/01/202ImFirstName333aSurname333aFirstname333@Surname3b.com19/01/202119/01/202ImForenameSurnameEmail16/03/202116/03/2021* * *
Clicking Bulk Add allows you to add multiple users to this Group Subscription at once.	Manage Your Subscription Croop Uses Data Add Buik Remove Reports Buik Add Buik Remove Reports Buik Add Buik Remove Reports Buik Add Buik Remove Reports Buik Add Buik Remove Reports Buik Add Buik Remove Reports Buik Add Buik Remove Reports Buik Add Buik Remove Reports Buik Add Buik Remove Reports Buik Add Buik Remove Buik Remove Buik Add Buik Remove Buik Add Buik Remove Buik Add Buik Remove Buik Add Buik Remove Buik Remove Buik Add Buik Remove Buik Add Buik Remove Buik Remove Buik Remove Buik Remove Buik Remove
By uploading a .CSV File in the format explained here, you can quickly add multiple users into this Group Subscription at once.	File Layout Information & Examples Lag a statistic (E. Mindows Kologal) - usawe acad main in it's own row cell prior to saving as a cw flat. Lag a statistic (E. Mindows Kologal) - usawe acad main in it's own row cell prior to saving as a cw flat. Lag a statistic (E. Mindows Kologal) - usawe acad main in it's own row cell prior to saving as a cw flat. Lag a seasare flat formation in the flat own row cell prior to saving as a cw flat. Lag a seasare flat formation in the flat own row cell prior to saving as a cw flat. Lag a seasare flat formation in the flat own row cell prior to saving as a cw flat. Lag a seasare flat formation in the flat own row cell prior to saving as a cw flat. Lag a seasare flat formation in the flat own row cell prior to saving as a cw flat. Lag a seasare flat formation in the flat own row cell prior to saving as a cw flat. Lag a seasare flat formation in the flat own row cell prior to saving as a cw flat. Lag a seasare flat formation in the flat own row cell prior to saving as a cw flat own

Admin – View Demographics



Upon clicking on the View Demographics button, the User's Demographics will be displayed

	Subscription Demographics
	Search. Do you take an active part in making or influencing decisions regarding your p
	List Consultant - please specify
	Name of Scheme
	Other Role
J Carter jonathan.carter@wyverndm.co.uk	How long have you worked in the pensions industry?
	Please indicate the size of your scheme
Add Subscription Business Green - Enterprise V	Please select the most appropriate scheme type:
Investment Week - Test Sub	What type of Trustee are you?
Investment Week - Test Sub Inactive Investment Week 1 Year Active	Are you a trustee in any capacity?
Professional Pensions CC Active	Which of the following best describes your role in the pensions industry?
	Are you registering as a
	PIQ - Last digit of your year of birth
	Yes, I understand and accept
	Mail
	Phone
	Email
	Mobile
	ThirdParty_Mail
	ThirdParty_Phone
	ThirdParty_Phone

Subscription Demographics		×
Do you take an active part in making or influencing decisions regarding your pension scheme?	0	
Consultant - please specify	0	
Name of Scheme	0	
Other Role	0	
How long have you worked in the pensions industry?	0	
Please indicate the size of your scheme	£251m - £1bn	
Please select the most appropriate scheme type:	DC scheme	
What type of Trustee are you?	0	
Are you a trustee in any capacity?	No	
Which of the following best describes your role in the pensions industry?	Investment Manager	
Are you registering as a	Government Body	
PIQ - Last digit of your year of birth	8	
Yes, I understand and accept	True	
Mail	false	
Phone	false	
Email	false	
Mobile	false	
ThirdParty_Mail	false	
ThirdParty_Phone	false	
ThirdParty_Phone	false	
ThirdParty_Mobile	false	

Admin – My Account

Manage

-

View / Manage Group Users

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**.

Manage

-

View Transactions

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



Next: My Account – View/Manage Group Users

Admin - Manage Group Users



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

Manage You	r Subscription					🔤 🗙	1	r	Numbe	r of Use	ers / Numbe	er of Ava	ailable Sp	aces		
Group user Search: List: All Re		Bulk Add	۲ с	Report		Users:3/5					lser – Click tl User – Click t			(1)		
Forename	Surname	Email	Added	Updated					Forename	Surname	Email	Added	Updated			
Firstname	Surname	Test/@WyvernDM.co.uk	17/03/2021	17/03/20	Ū.				Firstname	Surname	Test1@WyvernDM.co.uk	17/03/2021	17/03/20 🔞			
Firstname	Surname	Trist2@WyvernDM.co.uk	17/03/2021	17/03/20	Î				Firstname	Surname	Test2@WyvernDM.co.uk	17/03/2021	17/03/20 🔞			
Firstname	Surname	Test3@WyvernDM.co.uk	17/03/2021	17/03/20	ti i i i i i i i i i i i i i i i i i i				Firstname Forename	Surname	Test3@WyvernDM.co.uk	17/03/2021	17/03/20		~ x	
					+		1.00	→l	l'orenance			17/03/2021	11103/2021		· ·	

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.



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.

Home FAQs My Account LOG OUT Admin	Swyvernow	WA Wyvern Administrator
Reports		
mple Report No. 1 - Subscription Overview mple Report No. 2 - CC Report mple Report No. 3 - Subs by Demos bscriptions by Year bscriptions by Demo bscriptions Country Breakdown bscriptions Paid Total by Year bscription Renewals	Subscriptions: ALL	ptions Renewals
Home Terms of Service FAQs Contact Us	Wyvern DM Lt(Harrier House, Sedgeway iusiness Park, Ely, Cambridgeshire, CB6 2HY Wyvern DM Ltd registered n England No. 5278361	
© 2021 Wyvern DM Ltd		

Report results will be displayed here