

WYVERN DM MEMBERSHIP MANAGEMENT

System Functionality & User Guide – Version 1.0

Prepared For Incisive Business Media

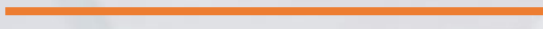


System Access

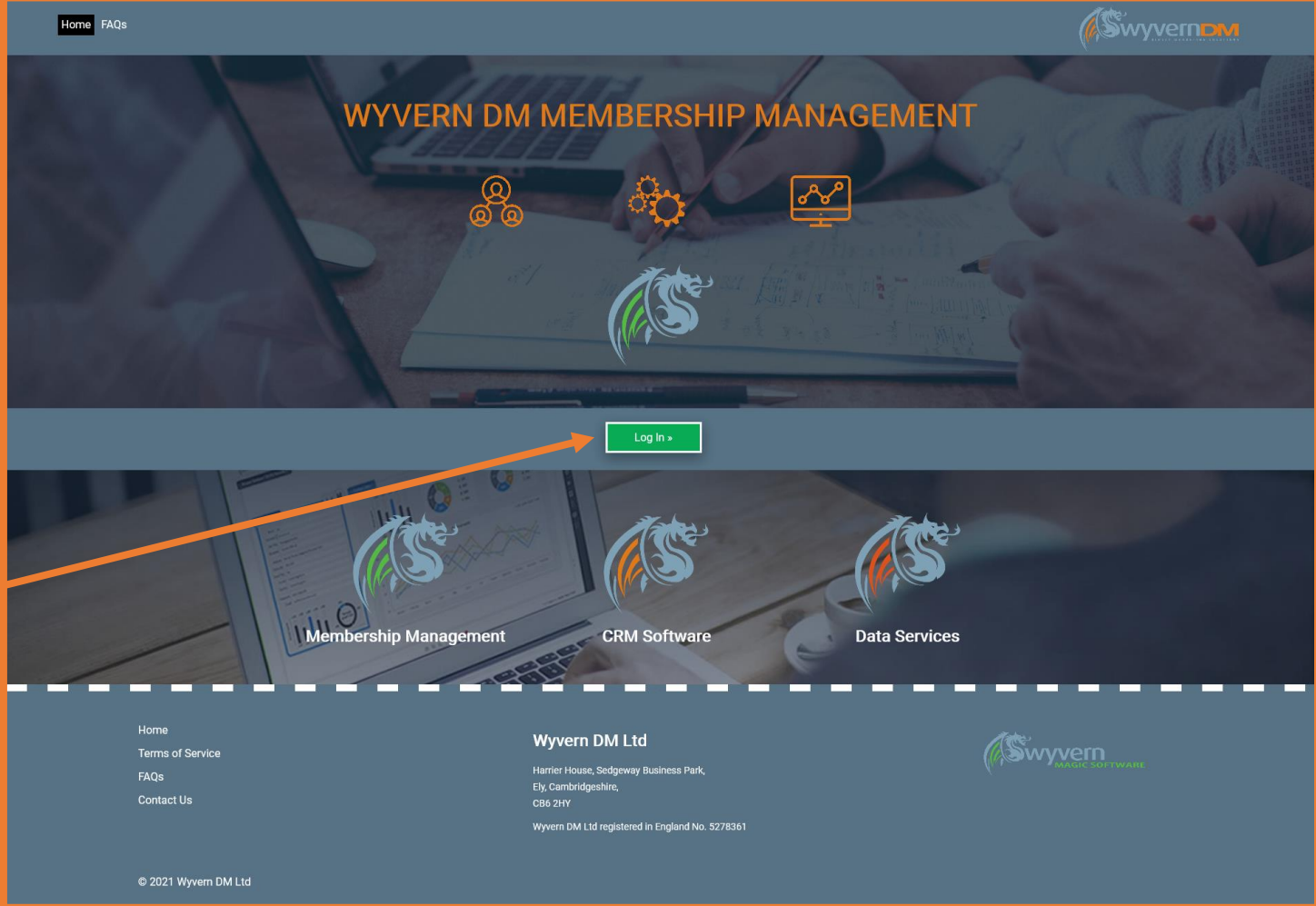


Wyvern DM Membership Management System URL:

<https://wyvernsbsinc.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. 



Home FAQs

WyvernDM
DIRECT MARKETING SOLUTIONS

WYVERN DM MEMBERSHIP MANAGEMENT

Log In >

Membership Management CRM Software Data Services

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Ely, Cambridgeshire,
CB6 2HY
Wyvern DM Ltd registered in England No. 5278361

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Next: System Access – Logging In

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 your 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.

Home FAQs

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Log In

Email Address

Password

Log In

Forgotten Password

Enter Your Email Address Below To Request A Password Reset

Email Address

Submit

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System Access – Access Levels

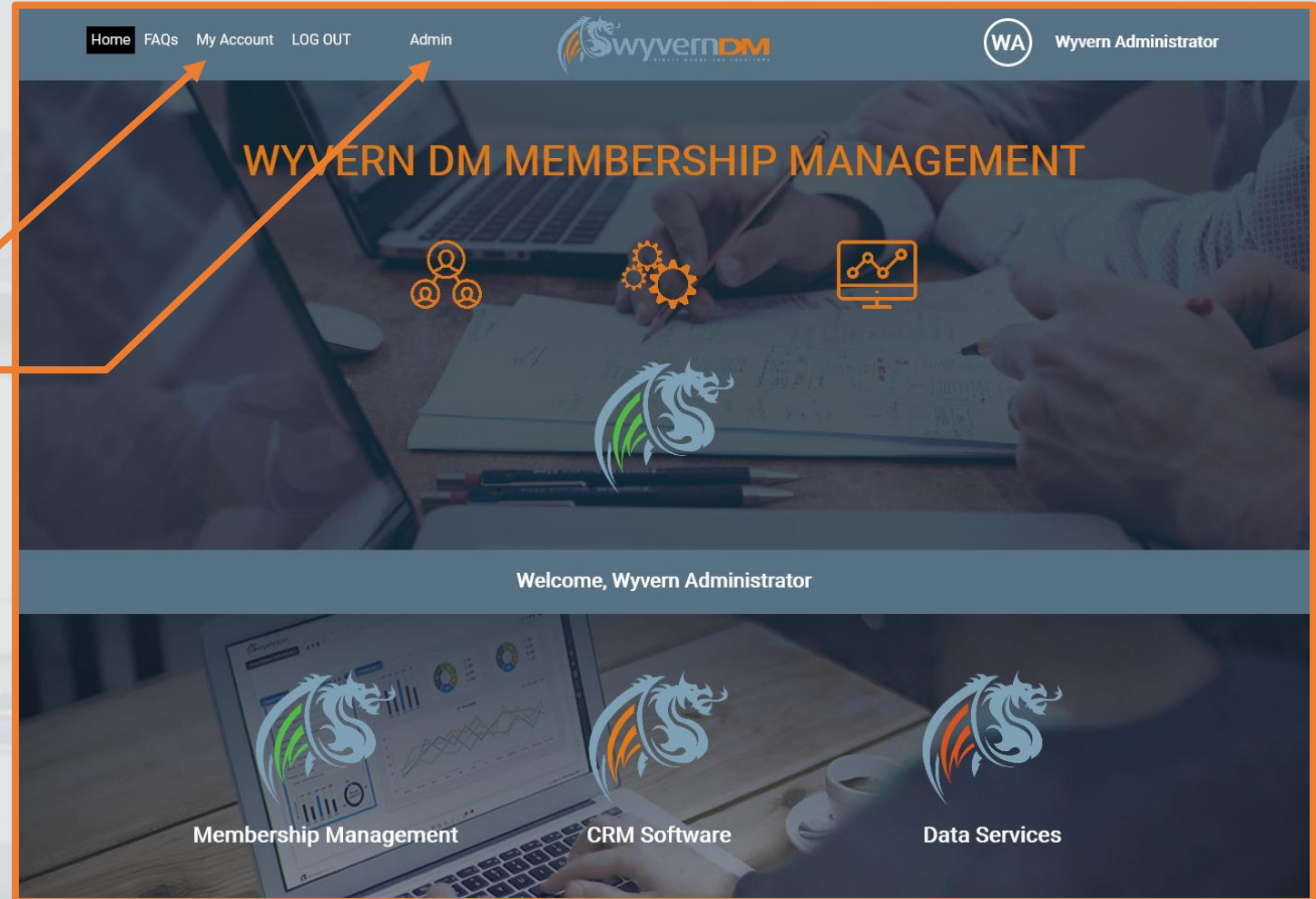
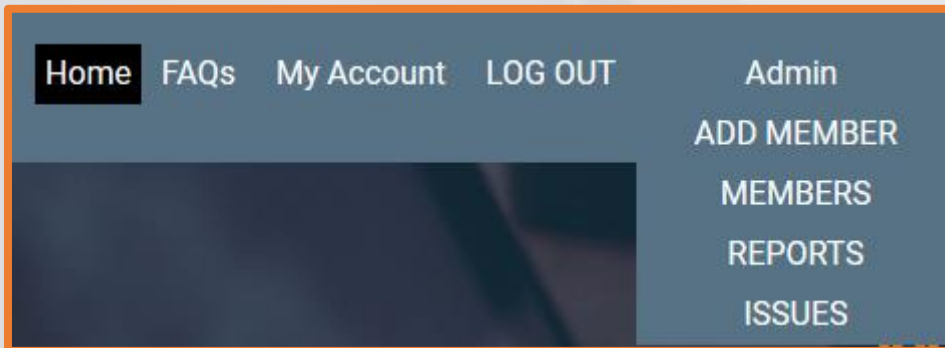


Upon successfully logging in, a newly displayed Menu Bar will become available.

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.

The screenshot shows the 'Add Group Manager' interface. At the top, there is a navigation bar with links for Home, FAQs, My Account, LOG OUT, and Admin. The SwyvernDM logo and 'Wyvern Administrator' are also present. Below the navigation bar, there is a 'Add Group Manager' button. The main content area is titled 'Add Group Manager' and 'Add a New Group Manager Below'. It features two tabs: 'Single Add' (selected) and 'Bulk Add'. The 'Create New Account' section contains several input fields: Email, Title (with a dropdown menu showing 'Mr'), First Name, Surname, Job Title, Direct Line, Company Name, Address 1, Address 2, Address 3, Town / City, Postcode, and Country. Below this is the 'Select Subscription:' section, which lists various subscription options with radio buttons next to them. The options include Professional Pensions (CC, 3 Year - Print & Digital, 3 Year - Digital Only, 2 Year - Print & Digital, 2 Year - Digital Only, 1 Year - Print & Digital, 1 Year - Digital Only), Enterprise, Trial, Computing, Computer Reseller News (CRN), CRN Essential (1 Year Corporate, 1 Year Individual), Channel Partner Insight (CPI), Cover, Investment Week, Business Green Online (3 Year, 2 Year, 1 Year, Trial, Membership, Enterprise), and Professional Adviser. At the bottom right, there is a green 'Add New Member' button. Two orange arrows point from the text on the left to the 'Create New Account' and 'Select Subscription' sections of the form.

Admin – Members



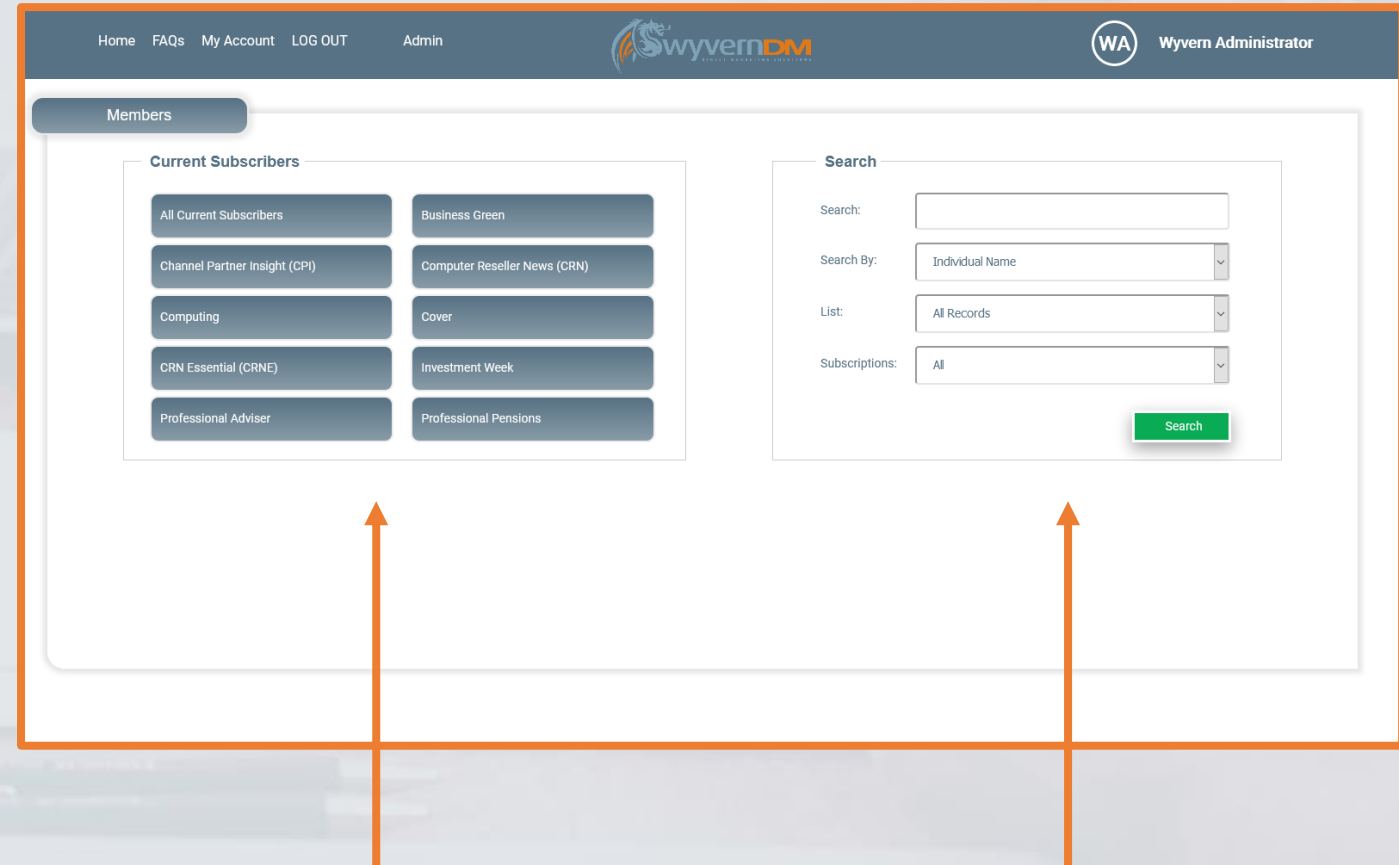
Upon clicking the **Members** option in the Admin Menu Drop-Down, you will be presented with the following screen.

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.

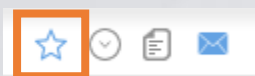
Member Data **Quick Search Functionality** **Download**

The screenshot shows the 'Members' page in the Wyvern Administrator. At the top, there is a navigation bar with links for Home, FAQs, My Account, LOG OUT, and Admin. The WyvernDM logo and 'Wyvern Administrator' are also present. Below the navigation bar, there is a search section with a search box containing '@WyvernDM.co.uk', a dropdown for 'By: Email address', a 'GO' button, and a refresh icon. There are also dropdowns for 'List: All Records' and 'Subs: All'. A '6 Records' indicator and a 'CSV' download button are on the right. The main content is a table with the following columns: ID, Individual Name, Email, Start Date, Expiry Date, Users, and Subscription. Each row has four action icons on the right: a star, a dropdown arrow, a document icon, and an envelope icon.

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.

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

The screenshot shows the 'Members' section of the WyvernDM Admin interface. A search bar is at the top with '@WyvernDM.co.uk' entered. Below it is a table of members with columns for ID, Individual Name, Email, Start Date, Expiry Date, Users, and Subscription. The fourth member, Franklin Rugg, has a 'View Subscription' button highlighted. Below the member list is a detailed view of subscriptions for Franklin Rugg, including columns for Subscription, Status, Start Date, Expiry Date, Days Remaining, Users, Reminders, and View. The 'View' column contains icons for favorite, transactions, group users, and demographics.

Hovering over a specific Subscription will then display further options

This close-up shows the 'View' column of the subscription details for Franklin Rugg. The 'View' column contains four icons: a star (Add Favourite), a bar chart (Manage Transactions), a group of people (Manage Group Users), and a document (View Demographics). The 'View' column is highlighted, and an orange arrow points from the 'View' button in the main screenshot to this close-up.

Add Favourite



Manage Transactions



Manage Group Users



View Demographics



Next: Admin – Manage Transactions

Admin – Manage Transactions

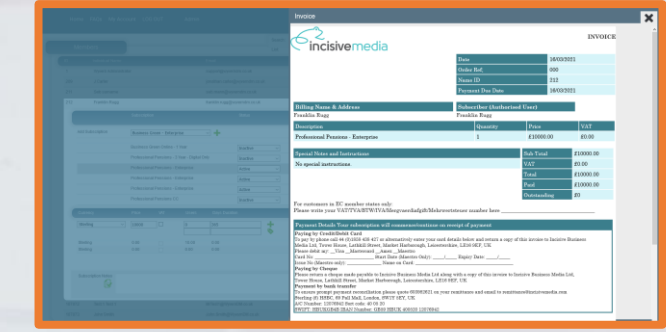


Upon clicking on the Manage Transactions button, the Member's Transactions will be displayed

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

The screenshot shows the 'Members' section of the Wyvern Administrator. At the top, there are navigation links: Home, FAQs, My Account, LOG OUT, and Admin. The user is logged in as 'Wyvern Administrator'. A search bar is present with the text '@WyvernDM.co.uk' and a 'GO' button. Below the search bar, there are dropdown menus for 'List' (set to 'All Records') and 'Subs' (set to 'All'). A table lists members with columns for ID, Individual Name, Email, Start Date, Expiry Date, Users, and Subscription. Below this, a detailed view of a subscription is shown with columns for Subscription, Status, Start Date, Expiry Date, Days Remaining, Users, Reminders, and View. An 'Add Subscription' dropdown is set to 'Business Green - Enterprise'. Below this, a table lists various subscriptions with their status (Inactive or Active), start and expiry dates, days remaining, and user counts. At the bottom, there is a table for transactions with columns for Currency, Price, VAT, Users, Days Duration, No, Method, Date, Status, View, Download, and Delete. An 'Add Invoice' button is highlighted with an orange arrow pointing to it.

Currency	Price	VAT	Users	Days Duration	Add Invoice
Sterling	10000	<input type="checkbox"/>	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

Group Users Bulk Add Bulk Remove Reports

Search: By: Email

List: All Records

Forename	Surname	Email	Added	Updated	
FirstName222a	Surname222a	Firstname222@Surname2b.com	19/01/2021	19/01/2021	<input type="button" value="Bin"/>
FirstName333a	Surname333a	Firstname333@Surname3b.com	19/01/2021	19/01/2021	<input type="button" value="Bin"/>
					<input type="button" value="+"/>

Number of Users / Number of Available Spaces

Users: 2/10
Favourite: 0/2

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

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

Forename	Surname	Email	Added	Updated	
FirstName222a	Surname222a	Firstname222@Surname2b.com	19/01/2021	19/01/2021	<input type="button" value="Bin"/>
FirstName333a	Surname333a	Firstname333@Surname3b.com	19/01/2021	19/01/2021	<input type="button" value="Bin"/>
<input type="text" value="Forename"/>	<input type="text" value="Surname"/>	<input type="text" value="Email"/>	16/03/2021	16/03/2021	<input type="button" value="✓"/> <input type="button" value="✗"/>

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. →

Manage Your Subscription

Group Users Bulk Add Bulk Remove 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 Achive Number.

File Upload: No file selected.

File Layout Information & Examples

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

Using a Spreadsheet Application (E.G. Microsoft Excel) - ensure each item is in its 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 – View Demographics

Admin – View Demographics



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

The screenshot shows the Admin interface with a modal window titled "Subscription Demographics" open. The modal contains a table of demographic data for a user.

Question	Answer
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

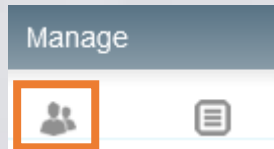
Next: Admin – Members – Search Results

Admin – My Account

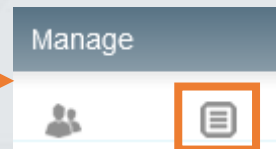
Upon clicking the **My Account** option in the Menu Bar, you will be presented with the following screen, which is specifically used by **Group Managers**.

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**

Home FAQs **My Account** LOG OUT Admin Wyvern Administrator

My Account

My Account
Update Your Account and Login Details

Your Account Details

First Name *
Surname *
Email *
Direct Line:
Title:
Job Title:
Company Name:
Address 1:
Address 2:
Address 3:
Town / City:
Postcode:
Country:

Your Purchases

Title	Status	Days Remaining	Expires On	Manage
Professional Pensions - Enterprise	Active	0		
Business Green - Enterprise	Inactive	0		
Business Green - Enterprise	Inactive	0		
Business Green - Enterprise	Inactive	0		
Business Green - Enterprise	Inactive	0		
Business Green - Enterprise	Inactive	0		
Business Green - Enterprise	Inactive	0	15/03/2021	

Your Login Details

Enter Current Password:
Enter New Password:
Confirm New 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 Your Subscription

Group Users Bulk Add Reports

Group users

Search: By:

List:

Forename	Surname	Email	Added	Updated	
Firstname	Surname	Test1@WyvernDM.co.uk	17/03/2021	17/03/20	<input type="button" value="Bin"/>
Firstname	Surname	Test2@WyvernDM.co.uk	17/03/2021	17/03/20	<input type="button" value="Bin"/>
Firstname	Surname	Test3@WyvernDM.co.uk	17/03/2021	17/03/20	<input type="button" value="Bin"/>
					<input type="button" value="+"/>

Users:3/5

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	<input type="button" value="Bin"/>
Firstname	Surname	Test2@WyvernDM.co.uk	17/03/2021	17/03/20	<input type="button" value="Bin"/>
Firstname	Surname	Test3@WyvernDM.co.uk	17/03/2021	17/03/20	<input type="button" value="Bin"/>
<input type="text" value="Forename"/>	<input type="text" value="Surname"/>	<input type="text" value="Email"/>	17/03/2021	17/03/2021	<input type="button" value="✓"/> <input type="button" value="✗"/>

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: No file selected.

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

Bulk Upload Example - Excel

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

WyvernDM

WA Wyvern Administrator

Reports

Sample Report No. 1 - Subscription Overview
Sample Report No. 2 - CC Report
Sample Report No. 3 - Subs by Demos
Subscriptions by Year
Subscriptions by Demo
Subscriptions Country Breakdown
Subscriptions Paid Total by Year
Subscription Renewals

Subscriptions Renewals

(?) Subscriptions: ALL

Report to screen

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Wyvern DM Ltd registered in England No. 5278361

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Report results will be displayed here