

WYVERN DM MEMBERSHIP MANAGEMENT

System Functionality & User Guide – Version 3.0

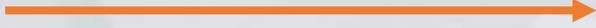


System Access



Wyvern DM Membership Management System URL:

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

Home FAQs

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WYVERN DM MEMBERSHIP MANAGEMENT

Log In >

Membership Management CRM Software Data Services

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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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Wyvern DM Ltd registered in England No. 5278361

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System Access – Access Levels

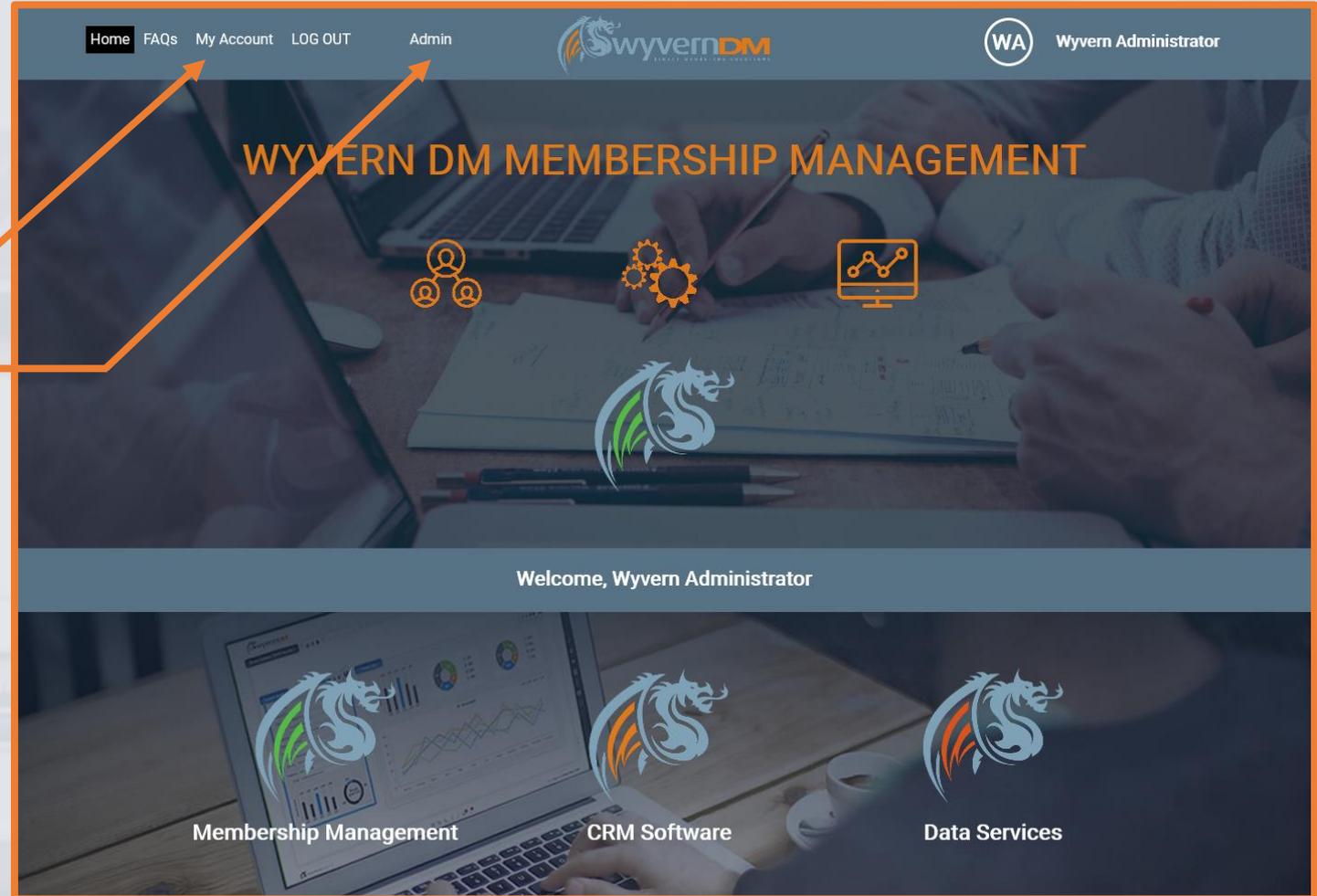
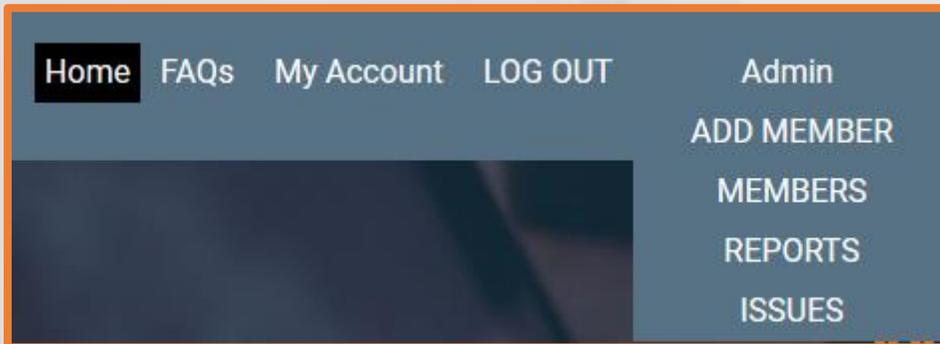


Upon successfully logging in, a newly displayed Menu Bar will become available.

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**

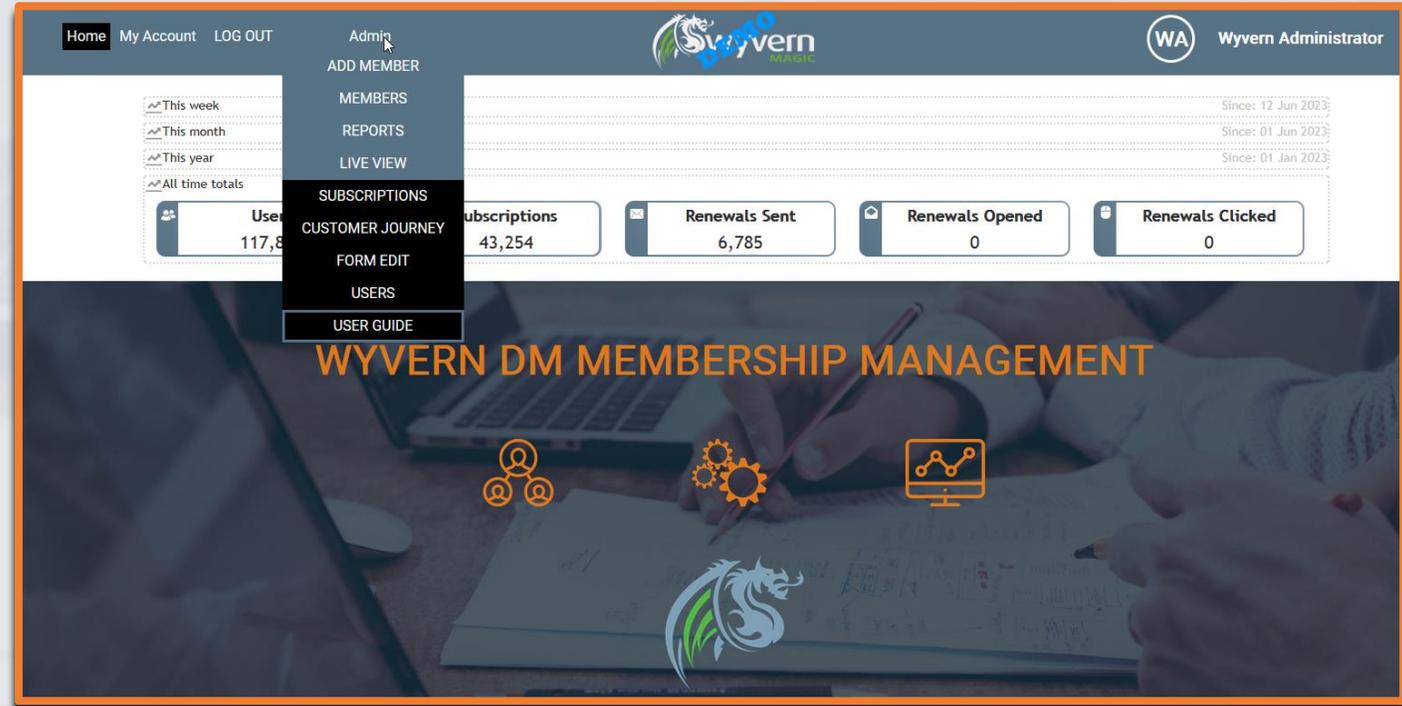
- The Members functionality is the main management suite of tools available to manage members held within the Membership System. This includes the ability to manage Subscriptions, Data, Transactions, Invoices and Demographics.

- **Reports**

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

- **Issues – (Not always available)**

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



Admin – Menu Options



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

- **Live View**

- The Live View page updates automatically to show people subscribing in a live dashboard.

- **Subscriptions**

- The Subscriptions page allows for editing and managing the subscription products in the system, as well as any associated discounts codes.

- **Customer Journey**

- The Customer Journey page is used to setup automated emails to go out on particular days of the subscriptions life. Aswell as show stats on what has been sent out.

- **Form Edit**

- The Form Edit page is a lite version of the our full form builder, allowing for minor changes to live forms.

- **Users**

- The Users page allows for managing users access to the admin system.



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.

Home FAQs My Account LOG OUT Admin WA Wyvern Administrator

Add Group Manager

Add Group Manager
Add a New Group Manager Below

Single Add Bulk Add

Create New Account

Email *

Title

First Name *

Surname *

Job Title

Direct Line

Company Name

Address 1

Address 2

Address 3

Town / City

Postcode

Country

Select Subscription:

- Professional Pensions CC
- Professional Pensions - 3 Year - Print & Digital
- Professional Pensions - 3 Year - Digital Only
- Professional Pensions - 2 Year - Print & Digital
- Professional Pensions - 2 Year - Digital Only
- Professional Pensions - 1 Year - Print & Digital
- Professional Pensions - 1 Year - Digital Only
- Professional Pensions - Enterprise
- Professional Pensions - Trial
- Computing - CC
- Computer Reseller News (CRN) - CC
- CRN Essential - 1 Year Corporate
- CRN Essential - 1 Year Individual
- Channel Partner Insight (CPI) - CC
- Cover - CC
- Investment Week - CC
- Investment Week 1 Year
- Investment Week - Test Sub
- Business Green Online - 3 Year
- Business Green Online - 2 Year
- Business Green Online - 1 Year
- BusinessGreen Online - Trial
- BusinessGreen Online - Membership
- Business Green - Enterprise
- Professional Adviser - CC

Add New Member

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 **Search** functionality allows you to search the Membership Management System based upon a range of search criteria: (Depending on what is entered into the search box the 'search by' will auto change based on it's contents, based on the sub-bullet points below.)

- Individual Name
- Organisation Name
- Email Address
 - A valid formatted email will auto switch the search by.
- Subscriber ID
 - A number will auto switch the search by.
- Order/Invoice Ref [OR|IN|INV]
 - A number prefixed by 'OR', 'IN', 'INV' will auto switch the search by.
- Post code
- Payment ref [PR|TX]
 - A number prefixed by 'PR', 'TX' will auto switch the search by.

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

On the right 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. With other quick links underneath.

Search Functionality

The screenshot displays the 'Members' page in the WyvernDM Admin interface. At the top, there is a navigation bar with 'Home', 'My Account', 'LOG OUT', and 'Admin' links, along with the WyvernDM logo and 'WA Wyvern Administrator' user information. Below the navigation bar, the 'Members' section is highlighted. On the left, the 'Search' section contains a search box, a 'Search By' dropdown menu (set to 'Individual Name'), a 'List' dropdown menu (set to 'All Records'), and a 'Subscriptions' dropdown menu (set to 'All'). A green 'Search' button is located below these fields. On the right, the 'Current Subscribers' section features a grid of quick links: 'All Current Subscribers', 'Business Green', 'Channel Partner Insight (CPI)', 'Computer Reseller News (CRN)', 'Computing', 'Investment Week', 'Professional Adviser', 'Professional Pensions', 'Sustainable Investment (SI)', and 'Cover'. Below this, the 'Others' section contains three quick links: 'Professional Pensions - Pending', 'Professional Pensions - Denied', and 'Investment Week - Rejected'. An orange arrow points from the 'Search Functionality' label to the search box, and another orange arrow points from the 'Quick Links' label to the 'Professional Pensions - Denied' link.

Quick Links

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**

ID	Individual Name	Company	Job Title	Email	Created	Start	Expiry	Users	Actions
1	Wyvern Administrator		System Administrator	support@wyverndm.co.uk	07 Jan 2021	15 Dec 2020		6/20	☆ ⌵ 📄 ✉️ ➦
209	Jonathan Carter	Wyvern	IT	jonathan.carter@wyverndm.co.uk		01 Nov 2022	01 Nov 2023	0/0	☆ ⌵ 📄 ✉️ ➦
211	Seb Mann	Wyvern	IT	seb.mann@wyverndm.co.uk	28 Feb 2023	31 Mar 2022	28 Feb 2023	0/0	☆ ⌵ 📄 ✉️ ➦
212	Franklin Rugg		IT	franklin.rugg@wyverndm.co.uk	19 Jan 2021	18 Feb 2021	18 Feb 2024	0/0	☆ ⌵ 📄 ✉️ ➦
138203	Matt Frewin	Wyvern DM	Test Developer	matthew.frewin@wyverndm.co.uk	04 Apr 2022	02 Apr 2022	30 Mar 2022	0/3	☆ ⌵ 📄 ✉️ ➦
138206	Michael M Miller	WyvernDM	programmer analyst	michael.miller@wyverndm.co.uk	10 Nov 2021	10 Nov 2021	10 Nov 2021	0/0	☆ ⌵ 📄 ✉️ ➦
139588	John Smith			johnsmith@wyverndm.co.uk	11 Oct 2022	11 Oct 2022		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



External Details



Next: Admin – Members – View Subscriptions

Admin – View Subscriptions



Upon clicking on the View Subscription button, the Member's Subscriptions will be displayed, each colour coded by the status.

Clicking the chevrons will hide the summary cards, and will allow for a new subscription to be added.

Clickable summary cards show stats of this users subscriptions.

Total shown

Hovering over a specific Subscription will then display further options

Favourite

Manage Transactions

Manage Group Users

View Demographics

External Password



Next: Admin – Manage Transactions

Admin – Manage Transactions



Upon clicking on the subscription row, or manage Transactions button, the Member's Transactions will be displayed, while the other subscriptions are hidden to focus the view.

The screenshot shows the 'Wyvern Administrator' interface. At the top, there are navigation links: Home, My Account, LOG OUT, and Admin. The main header includes the WyvernDM logo and 'WA Wyvern Administrator'. Below this is a search bar with the text '@WyvernDM' and a 'GO' button. There are also filters for 'List: All Records' and 'Subs: All'. A notification bubble shows '7 Records'. The main content area is divided into several sections:

- Subscriptions Summary:** Shows 10 Subscriptions, 2 Brands, 1 Active, and 0 Awaiting Start.
- Subscription List:** A table with columns: Subscription, Status, Created, Start, Expiry, Days, Additional, Users, Reminders, and Actions. One row is highlighted: 'BusinessGreen - Enterprise' (Active, Created 16 Mar 2021, Start 16 Mar 2021, Expiry 16 Mar 2022, Days 244, Users 3/5, Reminders checked).
- Add New Invoice Form:** Includes fields for Currency (Sterling), Price (1999), VAT?, Users (999), Days Duration (365), and Discount Code. A green '+' icon is next to the form.
- Invoices Table:** A table with columns: No, Created, Discount, Price, VAT, Users, Days, Method, Paid Date, Status, Download, and Actions. Two rows are shown:

No	Created	Discount	Price	VAT	Users	Days	Method	Paid Date	Status	Download	Actions
IN179076	17/03/2021	£0.00	£0.00	<input type="checkbox"/>	5	0	Invoice	17/03/2021	Paid	<input type="checkbox"/>	
IN179073	16/03/2021	£0.00	£10000.00	<input type="checkbox"/>	0	0	Invoice	16/03/2021	Paid	<input checked="" type="checkbox"/>	
- Subscription Notes:** A text area for adding notes, with a green save icon and a close 'X' icon.

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

Invoices that are available for download will show a checkbox in the Download column.

Notes can be added into the notes box here. These will appear on the invoice if desired.

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**

Users: 3/5
Favourite: 0/3

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

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	
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.

Upload Type:
 Simple
 Full

File Upload:
 No file selected.

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

File	Home	Insert	Page Layout	Formulas	Data	Review	View	Help	Team	Q	Tell me what you want to do.								
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
1	John	Smith	Computing	02333 883376	Wyvern DM	Sumner House	Sedgemoor Business Park	Common Road	Witchford	Cambridgeshire	CB8 2DF	United Kingdom							
2	Jane	Smith	Marketing	02333 883376	Wyvern DM	Sumner House	Sedgemoor Business Park	Common Road	Witchford	Cambridgeshire	CB8 2DF	United Kingdom							

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 form with various demographic questions and their corresponding answers.

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

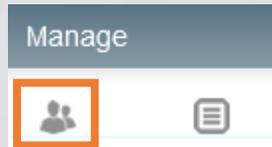
Next: Admin – Members – Search Results

Admin – My Account

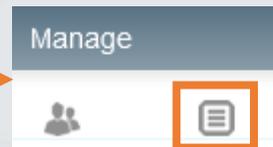
Upon clicking the **My Account** option in the Menu Bar, you will be presented with the following screen, which is specifically used by **Group Managers**.

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

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 - 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. When you run the report the url contain all parameters so you can copy and paste it to send to others.

The screenshot shows the WyvernDM Admin interface. At the top, there is a navigation bar with links for Home, My Account, LOG OUT, and Admin. The WyvernDM logo and 'Wyvern Administrator' are also present. Below the navigation bar, a 'Reports' button is highlighted. A sidebar menu on the left lists various report categories: General, Finance, Subscriptions, Registrations, and Renewals. Under the 'General' category, 'Subscription Overview' is selected and highlighted in blue. To the right of the sidebar, the 'Subscription Overview' report parameters are displayed. These include: '(?) Subscriptions: ALL', '(?) Days Remaining: [input field]', 'Filter: [input field]', '(?) Search: [input field]', 'By: Individual name', '(?) List: All Records', '(?) Date from: 15 May 2023', and '(?) Date to: 15 Jun 2023'. At the bottom right of the parameters section, there are two buttons: 'Download report' and 'Report to screen'. Below the parameters, a 'Subscription Overview' button is highlighted, and a large empty box is shown where the report results will be displayed.

Report results will be displayed here

Admin – Live View



Upon clicking on the Live View Option in the Admin Menu Drop Down, you will see new users appear here when they subscribe.

Each one is clickable to be brought to the members screen to see the full detail.

Home My Account LOG OUT Admin		Wyvern		WA Wyvern Administrator			
Last Checked:	14:18:19	First Checked:	14:18:19	Count:	10	Value:	0
🕒 14:26.34	Seb Mann	SM	📖 Sustainable Investment – CC	£0.00			
📅 08 Jun	Existing User		Active 08 Jun 2023				
🕒 14:21.01	Seb Mann	SM	📖 Investment Week - CC	£0.00			
📅 08 Jun	Existing User		Active 08 Jun 2023				
🕒 13:55.17	Seb Mann	SM	📖 Cover - CC	£0.00			
📅 08 Jun	Existing User		Active 08 Jun 2023				
🕒 11:45.16	Seb Mann	SM	📖 Professional Pensions CC	£0.00			
📅 08 Jun	Existing User		Active 08 Jun 2023				
🕒 12:50.32	Seb Mann	SM	📖 Professional Pensions Essential 2022 - 1 Year	£0.00			
📅 02 Jun	Existing User		AwaitingStart 03 Jun 2024				
🕒 11:18.24	Seb Mann	SM	📖 Professional Pensions Essential 2022 - 1 Year	£0.00			
📅 02 Jun	Existing User		AwaitingStart 03 Jun 2023				
🕒 10:16.37	Franklin Ruggg	FR	📖 Professional Pensions Essential 2022 - 1 Year	£0.00			
📅 30 May	Existing User		AwaitingStart 27 Sep 2023				
🕒 10:58.38	Jonathan Carter	JC	👤 BusinessGreen - Enterprise	£0.00			
📅 07 Mar	Existing User		Inactive 07 Mar 2023				

Admin – Subscriptions



Upon clicking on the Subscriptions Option in the Admin Menu Drop Down, you will see all subscriptions setup in the system, and edit their details.

The discounts tab show's all discounts. Click add to create a new one.

Use the edit options to amend the details, and link specific items to each.

Each discount code is linked to a subscription to be valid. By the green link icon.

Simply click the code to copy it to clipboard

Home My Account LOG OUT Admin WA Wyvern Administrator

Subscriptions Discounts

No subscription selected

Subscriptions

ID	Title	Description	Price	Duration	Status	Edit
1	Professional Pensions CC	Professional Pensions CC	0.00	364	Active	
6	Professional Pensions - 1 Year - Print & Digit	Professional Pensions - 1 Year - Print & Digital	629.00	365	Inactive	
7	Professional Pensions - 1 Year - Digital Only	Professional Pensions - 1 Year - Digital Only	599.00	365	Inactive	
8	Professional Pensions - Enterprise	Professional Pensions - Enterprise	1,358.00	0	Active	
9	Computing - CC	Computing - CC	0.00	365	Active	
10	Computer Reseller News (CRN) - CC	Computer Reseller News (CRN) - CC	0.00	365	Active	
11	Channel Partner Insight (CPI) - CC	Channel Partner Insight (CPI) - CC	0.00	365	Active	
12	Cover - CC	Cover - CC	0.00	365	Active	
13	Investment Week - CC	Investment Week - CC	0.00	365	Active	
16	BusinessGreen Insider - 1 Year	BusinessGreen Insider - 1 Year	439.00	365	Inactive	
17	Professional Adviser - CC	Professional Adviser - CC	0.00	365	Active	
18	CRN Essential - 1 Year Corporate	CRN Essential - 1 Year Corporate	4,995.00	365	Active	
19	CRN Essential - 1 Year Individual	CRN Essential - 1 Year Individual	1,595.00	365	Active	
20	Investment Week 1 Year	Investment Week 1 Year	365.00	365	Active	
21	BusinessGreen Online - Trial	BusinessGreen Online - Trial	0.00	7	Active	
22	Professional Pensions - Trial	Professional Pensions - Trial	0.00	7	Active	
24	Investment Week - Test Sub	Investment Week - Test Sub	1.00	7	Inactive	

Home My Account LOG OUT Admin WA Wyvern Administrator

Subscriptions Discounts

No subscription selected

Discounts

ID	Title	Description	Code	Amount	Type	Start	End	Status	Subs	Edit
33	NZF10	NZF10	NZF10	10	Percent	26-Oct-2022 00:00:00	13-Nov-2022 13:10:04	Inactive	1	
32	Test10	Test10	TEST10	10	Percent	24-Oct-2022 00:00:00	01-Oct-2024 00:00:00	Live	1	
31	JCTest	Testing VAT on invoice	JCTest	10	FixedPrice	03-Oct-2022 00:00:00	07-Oct-2022 00:00:00	Inactive	1	
30	Test10 % off	Test10 % off	test10code10	10	Percent	20-Sep-2022 00:00:00	02-Feb-2023 13:22:31	Inactive	5	
29	50off	50off	50OFF	5	Subtract	11-Jul-2022 00:00:00	12-Jul-2022 00:00:00	Inactive	1	
28	test	test	test11	11	Percent	08-Jul-2022 00:00:00	09-Jul-2022 23:59:59	Inactive	0	
27	PP E Test Discount	PP E Test Discount	PPE1	5	Percent	08-Jul-2022 00:00:00	09-Jul-2022 23:59:59	Inactive	1	
26	May 20	May 20% off	MAY20220	20	Percent	18-May-2022 00:00:00	31-May-2022 23:59:59	Inactive	1	
25	May 15	May 15% off	MAY202215	15	Percent	17-May-2022 00:00:00	31-May-2022 23:59:59	Inactive	1	
24	General 10% Discount	10% off subscription	10%OFF2022	10	Percent	04-Apr-2022 00:00:00	30-Aug-2022 00:00:00	Inactive	1	
23	BG LE April 2022	15% Off Total	BGLEAPRIL22	15	Percent	27-Apr-2022 00:00:00	30-May-2022 00:00:00	Inactive	1	
8	Discount001	D0011	D0011	10	Percent	07-Apr-2022 23:00:00	31-Aug-2022 00:00:00	Inactive	1	
7	March 10	March 10	MARCH10	10	Percent	25-Mar-2022 00:00:00	31-Mar-2022 23:59:59	Inactive	1	
6	PP March 25% off	PP March 25% off	PPMARCH25	25	Percent	25-Mar-2022 00:00:00	08-Apr-2022 23:59:59	Inactive	0	
5	BP COP26 10%	BP COP26 10%	COP26	10	Percent	02-Nov-2021 00:00:00	31-Jan-2022 00:00:00	Inactive	2	
4	Print & Digital Only save 20%	Print & Digital: £471.75 (save 25% until 30 Nov)	PPFDIGIHOV25	25	Percent	01-Oct-2021 00:00:00	30-Nov-2021 00:00:00	Inactive	1	
3	Digital Only save 25%	For Digital Only: £449.25 (save 25% until 30 Nov)	PPDIGIHOV25	25	Percent	29-Oct-2021 00:00:00	30-Nov-2021 00:00:00	Inactive	1	
2	15% discount	15% discount (Expires 8th October 2021)	PP-EOQ3-15	15	Percent	09-Jan-2021 00:00:00	10-Aug-2021 00:00:00	Inactive	0	
1	PP-EOQ3-10 - 10% disco	PP-EOQ3-10 - 10% discount (Expires 8th October 2021)	PP-EOQ3-10	10	Percent	23-Sep-2021 00:00:00	08-Oct-2021 00:00:00	Inactive	1	

1: Professional Pensions CC Linked Items

Subscription Link Import Source Default Preferences

ID	Sub ID	Type	Value
1264	1	Booking Default Invoice Address	20
8	1	Default From Address	renewals@mail.ProfessionalPensions.com
1164	1	Default From Name	ProfessionalPensions
11	1	Email Verification Page URL	https://WyvernSubscrip.wyvernsoft.co.uk/AccountConfirmation
1110	1	MailGun Email Domain	mail.ProfessionalPensions.com
1137	1	Membersip Subscription Extra Info OrderHeaderTypeID	16
13	1	Subscription External API ImportSourceType	4
1015	1	Subscription OrderHeaderTypeID	2
9	1	Subscription Payment Confirmation BCC Address	no-reply@wyvern.co.uk

The link option allows to set things such as default email names used etc.

Admin – Customer Journey



Upon clicking on the Customer Journey Option in the Admin Menu Drop Down, you will see all brands setup in the system. Clicking one, will show the associated subscriptions. Clicking a subscription will show the automated emails setup, and allow others to be added.

Days of subscription that this will be sent.

Stats of how many have been sent.

The screenshot displays the 'Customer Journey' admin interface. At the top, there's a navigation bar with 'Home', 'My Account', 'LOG OUT', and 'Admin'. The main header shows 'Wyvern' and 'Wyvern Administrator'. Below this, a list of subscriptions is shown, including 'Business Green', 'Channel Partner Insight (CPI) (TCC)', 'Computer Reseller News (CRM) (TCC)', 'Computing (TCC)', 'Cover', 'International Investment (I)', 'Investment Week', 'Professional Adviser', and 'Sustainable Investment (SI)'. The 'Professional Adviser' subscription is highlighted in blue. Below the list, a vertical timeline shows four email campaigns. Each campaign entry includes the number of days remaining, the subscription name, and a table of statistics: Sent, Open Rate, and Click Rate. For example, the first campaign '28 Days remaining' for 'Inclusive - PP CC 4 Weeks - v2' has 828 sent, a 39.31% open rate, and an 83.44% click rate. To the right of each campaign is a small preview of the email content, such as 'PENSIONS Membership renewal'. A vertical navigation bar on the right side of the interface has a downward-pointing arrow.

Small preview of email content. Click to see full size.

Admin – Form Edit



Upon clicking on the Form Edit Option in the Admin Menu Drop Down, you will see a list of all form pages setup in the system. Clicking a row will allow you edit

Clicking a row will show the edit.

Custom page name

When editing a form, hovering over a section will show additional options.

Click label to edit

Hover over the required text to add or remove.

Red X to delete field

Home My Account LOG OUT Admin

Wyvern
WA Wyvern Administrator

No form selected

Forms NEW

ID	Title	Last Modified	Page ID	Page name
402	Professional Pensions - Paid - 2022 Essential	08 Dec 2021	77	/Virtual/JoinPPEPay
401	Billing address tester	26 Jul 2021	76	
400	Channel Partner Insight CPI - May 2021	09 Jul 2021	74	/Virtual/JoinCPI
399	COVER - CC - May 2021	01 Jul 2021	72	/Virtual/JoinCOV
398	Professional Adviser - CC - May 2021	22 Jun 2021	70	/Virtual/JoinPA
397	Computer Reseller News Essential CRNE - Paid - May 2021	15 Jun 2021	67	/Virtual/JoinCRNE
396	Computer Reseller News CRN - Free - May 2021	15 Jun 2021	66	/Virtual/JoinCRN
395	Computing - CC - May 2021	03 Jun 2021	64	/Virtual/JoinCTG
394	Professional Pensions - Trial - May 2021	28 May 2021	63	/Virtual/TrialPP
393	Professional Pensions - Paid - May 2021	28 May 2021	58	/Virtual/JoinPPPpay
392	Professional Pensions - CC - May 2021	28 May 2021	61	/Virtual/JoinPP
391	Investment Week - Paid - May 2021	13 May 2021	57	/Virtual/JoinIP
390	Investment Week - CC - May 2021	10 May 2021	56	/Virtual/JoinIW
389	Business Green - Trial - May 2021	15 Apr 2021	53	/Virtual/TrialBG
388	Testing form 0521	15 Apr 2021	52	
387	Business Green - Paid - May 2021	08 Apr 2021	51	/Virtual/JoinBG /Virtual/JoinBGBasic /Virtual/JoinBGConsider /Virtual/JoinBGPriority

Agency Services * Click to add required X

Employee size ↔

Agency Services * Click to add required X

Turnover ↔

Agency Services * Click to add required X

Company URL ↔

* Required X

Find my address (enter manually if outside of the UK)

Postcode

Enter Manually Find Address

Phone Number

Add new item...