Release Notes for the Cisco CMX Engage Release 3.2

Release Month: May, 2017

Contents

This document describes the new features, enhancements, resolved issues, and open issues for the Cisco CMX Engage Release 3.2. Use this document in conjunction with the documents listed in the "Support" section on page 7.

Introduction to the CMX Engage

CMX Engage is a location intelligence, digital customer acquisition and multi-channel engagement platform that enables companies to connect, know, and engage with visitors at their physical business locations.

The major features of the CMX Engage 3.2 release are as follows:

- Automatic Meraki network creation for New Locations assigned to Location Managers.
- A Help button in the CMX Engage dashboard to access the CMX Engage documentation.
- Reports specific to Profile Rules to evaluate the profile rule performance and customer behavior.
- Real-time reports to evaluate the customers currently present at your business locations.
- Provision to share the location data with the delegates (customer partners).

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- Show Authentication as an inline module in the captive portal.
- The Team option enhanced with new features.
- Location metadata moved to Tools option.
- Provision to add CMX Zones in the location hierarchy.
- Access to Feedback and Help modules in the captive portal without authentication.
- Enhanced input validation in the Data Capture form.
- Ability to re-order modules in the captive portals.
- Finger Print Verification for Soft SMS.

New Features

CMX Engage Dashboard

CMX Engage Runtime

CMX Engage Dashboard

The following new features are introduced in the CMX Engage dashboard:

Location Activation with Automatic Meraki Network Creation

If the Account Admin is assigning the location manager a location that is not yet added in the Meraki, the CMX Engage can now automatically create that network in the Meraki with the predefined network template. The network will be created in the Meraki when the location manager activates the location, and the network configurations defined in the template will be activated. For example, the SSIDs defined in the network template starts broadcasting. In the CMX Engage dashboard, you can view the newly added network in the location hierarchy under the specified organization to which the location manager is invited.

Help Feature

A new button "Help" is available in the CMX Engage dashboard. You can access the online Help documentation for CMX Engage using this button.

Profile Rule Reports

A new report, Profile Rule Report, is added to the CMX Engage that is specific to each profile rule. In the CMX Engage dashboard, in the Profile Rules page, when you click a profile rule, the Profile Rule report for that rule is displayed.

The Profile Rule Report has the following sections:

At the top of the report the total number of devices and customers tagged based on the particular profile rule are shown along with the number of tags removed based on the particular profile rule.

- **Rule Activity**- This section shows the performance of the rule. The tagging trends in this section displays a graph that shows the number of customers tagged on each day of the period specified. It also shows the total devices tagged from each location. If more than one tag is defined for the rule, the total customers tagged for each tag is also shown. You can also view the number of devices tagged at various timings in a day.

- **User Insights** -This section shows the types of customers tagged based on the particular profile rule. The number and percentage of male and female customers among the total customers tagged based on the rule are shown in the User Profile. The number and percentage of customers tagged to various tags defined for the particular profile is also shown in the User Profile. If the customers tagged for the rule are part of other tags, those tags are shown with the number and percentage of those customers. In addition, dwelling time and number of visits made by the customers are also shown.

Real-Time Reports

In the Reports, a Right Now (Real-time) section is now available using which you can view the details of the customers currently present in various locations for which you have access rights. You can filter the locations to view the report for a specific location. When filtering you can select only a single location.

The real -time report has the following information:

- The total number of customers currently present along with the number of new and returning customers.

- The five locations that have highest number of customers at present.

- The number of male, female, and the gender-not- specified customers among the total number of customers currently present.

- The count of mobile numbers, e-mail IDs, names, and so on captured from the customers currently present.

- The tag distribution of the customers currently present at the location.

- The dwell time distribution of the customers currently present at the location.

- The visit count (since last 30 days) distribution for the customers currently present at the locations.

- Number of customers currently present in various locations in earth map and list view.

Delegate Access to Location Information

The customers who own physical spaces that are used by multiple tenants can now selectively share in location behavior information with their tenants as well as allow their tenant to set up Engagement and Profile rules.

This feature is designed to share location information with the tenant only for users / devices who are already customers of the tenant (for example, they have installed an app provided by the tenant). Information about other users is not shared.

For example, an airport may choose to selectively share location information with their partner airlines. This allows airlines who normally do not own the airport infrastructure to get in-airport behavior information about their existing customers. The airline can partner with multiple airports to get information and execute rules across all of them. Also airport and the airline get access to their own

independent dashboard and reports. Airport will see information for all users visiting the airport and the airline will see information for all their users across airports. Rules set by airline and airport are independent of each other. Similarly, user preferences, opt in, and so on are also independent of each other.

This can be extended to other verticals as well. Malls can choose to share information with their tenants, Stadiums can share information with the home team and/or event partner, and so on.

CMX Engage Runtime

The following new features are introduced in the CMX Engage Runtime:

Inline Authentication Support

Captive Portal in the CMX Engage now supports authentication as an inline module along with other modules. That is, the authentication option is displayed before you click any link in the captive portal, thus reducing the number of clicks required before the customer can connect.

Currently you cannot do this configuration from the dashboard. This feature is available for new portals.

For Soft SMS and Hard SMS, the authentication section will have a field to enter the mobile number, along with a Connect button. For Email authentication, the authentication section will have a field to enter the email ID. For social authentication, the authentication section will have relevant buttons for each social network configured for the portal, using which the customer can complete the authentication through that social network. The Terms and Conditions will be displayed as a link above the **Connect** button.

However, the authentication process when clicking a link in the portal remains the same.

Enhancements

CMX Engage Dashboard

CMX Engage Runtime

CMX Engage Dashboard

The following enhancements are made to the CMX Engage Dashboard:

Team

The following changes are made to the Team option:

- In the Team Members List in the Team page, a new column "Locations" is added that lists the locations to which the CMX Engage users have access.

- You can now delete multiple CMX Engage users simultaneously. If you select more than one user, a Delete button appears in the top right of the Team page.

- The Access drop-down list is renamed as "Privileges".

- The template for the invitation e-mail has changed. In the new template, a "Accept Invite" button appears instead of the Activation link.

- The Choose Location window for Admin and Read Only Access is modified.

- The following enhancement are made for the location manager role:

  – The Choose Location window for Location Manager displays all the locations in the location hierarchy. But you can select only the network locations.

  – Location Manager can be created for existing locations and new locations. The Location Manager role will have the following buttons to specify the locations: Choose Locations, Create New Location. You can assign existing locations to the Location Manager using the Choose Location button. You can create new locations for the location manager using the Create New Location button. To create a new location, you must specify a name for the location and select the organization or group under which the location is to be created. You can only select a group that is under an organization. To create a location manager with new location you must be an account admin, and you have to connect to a Meraki account for which you have admin rights.

Location Manager

In the CMX Engage dashboard for the Location Manager, the Location Metadata option that was available under the location names are now moved to the Tools menu. In the Metadata screen you can select the network location for which you want to add or edit metadata. Earlier a Metadata option was available under each location using which you could view, add, or edit the metadata for a location.

Support to Add CMX Zones

CMX Engage is now enhanced to include the CMX zones in the location hierarchy. Currently, you cannot add the CMX zones directly from the CMX Engage dashboard. You must contact the CMX Engage support team to add the CMX Zones. After adding the CMX zones, they will be available in the location hierarchy.

CMX Engage Runtime

The following enhancements are made to the CMX Engage Runtime:

Access to Feedback and Help without Authentication

In the captive portal, the customers can now access the Feedback section and Help without completing any authentication process. If the customer click these links, they will get redirected to the corresponding pages.

Special Character Validation in the Data Capture Form

In the Data Capture form, for the First Name and Last Name fields, special character validation is enhanced to support all Unicode characters along with dot, space, and hyphen. This will allow customers to enter first name and last name in the language of their choice.

Module Re-ordering

CMX Engage Captive Portals now support re-ordering of modules. Re-ordering is allowed for all the modules and is not restricted only to the menu items. For example, you can now place the Promotions &Offers module in between menu modules (Venue Map, Videos, Help, Feedback, Get Internet, Get Apps, and custom menu items).

Currently you cannot re-order the modules using dashboard. This feature is available for new portals, and the support in Dashboard will be made available in the upcoming release.

Soft SMS Enhancements

The Soft SMS authentication is enhanced to verify the mobile number of the customer through a fingerprint verification process. The customer can complete the authentication process just by clicking on the link in the message and then the customer will be redirected to the landing page of the portal. Accessing the link will also verify the fingerprint and the customer will be acquired if the verification is successful. The customer is also provided an option to skip the verification process, and proceed to the landing page. If fingerprint is not verified or if the customer skips the verification process, the customer will see the authentication screen again on further visits with the mobile number pre-filled.

Resolved Issues

Table 1 Resolved Issues in the CMX Engage 3.2

Description
CMX Engage Dashboard
Taking too much time to connect to the Meraki network as there is delay in fetching the Meraki API key.
Unable to invite Admin and Read-only users if only root location is available.
CMX Engage Runtime
SMS gateway URL exposed in the SMS call response.

Open Issues

Table 2 Open Issues in the CMX Engage 3.2

Description
CMX Engage Dashboard
If many locations are listed for a location manager, then associated portals and metadata are not displayed correctly when clicking on any location.
In the location manager, UTF-8 characters are not supported for newly created locations.
For the SSID option, last updated time is not displayed properly.
Runtime
A repeat user who has completed the Soft SMS authentication has to provide the mobile number and complete the authentication process again to access the links in the captive portal.
During the Soft SMS authentication process, the confirmation page appears for the same device and browser.
If you change the Authentication type for a portal from Soft SMS to Hard SMS, the customers who had already completed Soft SMS authentication process before changing the authentication type will be considered as repeat user.
During Hard SMS authentication, if the customer click the change number link, and submits, the alert message "Please enter a valid verification code that you received in your inbox" is shown even before entering the OTP.

Support

You can access the support documentation using the Help button in the CMX Engage Dashboard.