



# Getting Started

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This chapter provides an overview of the CMX Engage, process flow, license packages, and the system requirements for the CMX Engage.

- [Overview, page 1-1](#)
- [Process Flow, page 1-4](#)
- [CMX Engage License Packages, page 1-5](#)
- [System Requirements, page 1-5](#)

## Overview

The Cisco 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.

This innovative cloud-based software platform delivers rich customer experiences and provides actionable location insights by unifying location engagement across all location technologies with unmatched reliability, while leveraging your existing infrastructure investments in the best possible way.

The major features and functionalities of the CMX Engage includes:

- [Defining Locations, page 1-2](#)
- [Importing SSIDs, page 1-2](#)
- [Create Portals, page 1-2](#)
- [Proximity Rules, page 1-2](#)
  - [Captive Portal Rule, page 1-2](#)
  - [Engagement Rule, page 1-3](#)
  - [Profile Rule, page 1-3](#)
- [View Reports, page 1-4](#)
- [Create CMX Engage Users, page 1-4](#)

## Defining Locations

The CMX Engage enables you to define the locations in which you have business. You can define the locations in the same hierarchical structure in which you have defined the locations in your wireless network. You can define the locations in the CMX Engage using the Manage Locations option. For more information, see the [“Location Hierarchy in the CMX Engage” section on page 3-1](#).

## Importing SSIDs

To define the captive portals for various SSIDs, you must import the SSIDs to the CMX Engage. You can import only those SSIDs that are defined in your wireless network. For more information on importing SSIDs, see the [“Importing the SSIDs” section on page 4-1](#).

## Create Portals

The captive portal refers to the portal that appears for a user who accesses your Wi-Fi from a particular location with a specific Wi-Fi network ID (SSID). The customers of this captive portal are internet users who connect to the Wi-Fi from a public Wi-Fi network at airports, malls, hotels, and so on.

You can enhance the portals with various features such as welcome messages, notices, promotions, apps, videos, help line, and so on using the various portal modules provided in the CMX Engage. For more information on creating and managing portals, see the [“Creating and Managing Portals” section on page 8-1](#).

## Proximity Rules

The CMX Engage enables you to create the following three types of proximity rules:

- [Captive Portal Rule, page 1-2](#)
- [Engagement Rule, page 1-3](#)
- [Profile Rule, page 1-3](#)

## Captive Portal Rule

The CMX Engage enables you to create Captive Portal Rules that define the captive portals for various locations and time for an SSID. You can configure to display a captive portal based on the location, number of visits made by the customer, type of customer, app status of the customer, and so on.

You can also use this rule to manage the internet provisioning for the customers, and to send customer information to an external API.

For more information, see the [“Defining Captive Portal Rules” section on page 5-1](#).

## Engagement Rule

The CMX Engage also functions as a Wi-Fi based beacon that facilitates you send appropriate information to your customers, who has a Wi-Fi enabled device, when the customer is in and around your business premises. The beacon functionality enables you to reach out to your customers individually with different promotions and offers. You can remind the customers about the offers available for them and their membership details. You can also set to provide offers only in certain outlets.

You can configure to send the notifications using the Engagement Rule option. The CMX Engage enables you to send the notification when a customer connects to a Wi-Fi or when a customer is with in a beacon premises.

The CMX Engage enables you to send the notifications in the following ways:

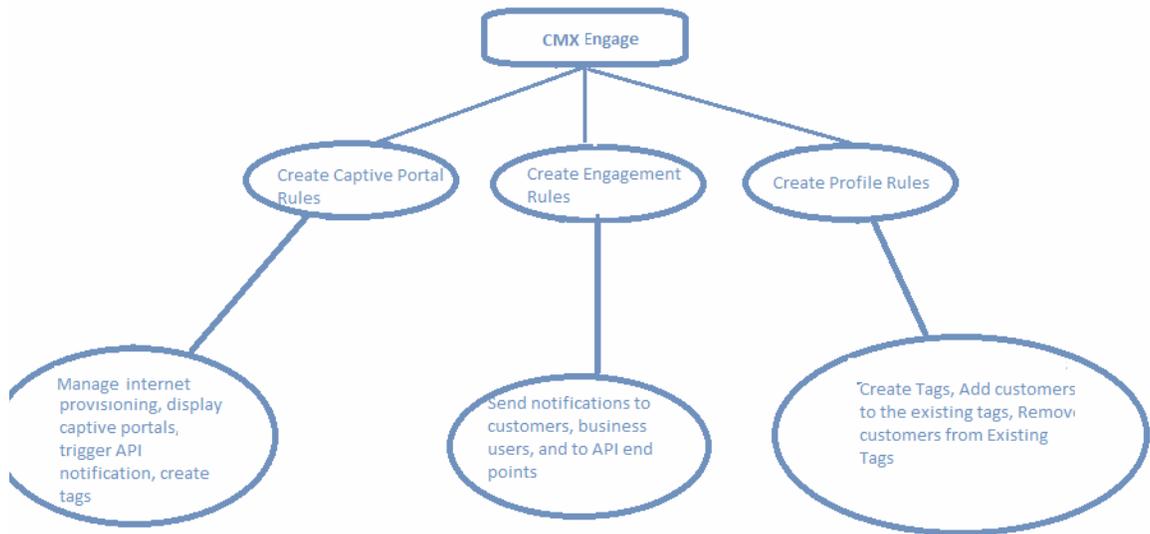
- SMS
- E-mail
- Push notifications using apps
- BLE Notifications
- API notifications

For more information, see the [“Defining the Engagement Rule to Send Notifications”](#) section on page 6-1.

## Profile Rule

The CMX Engage enables you create tags that are used to group the customers. You can create the tags using the Profile Rule. You can also use the Profile rule to add additional customers to an existing tag or remove certain customers from an existing tag. For more information on creating tags, see [“Defining the Profile Rules to Manage Tags”](#) section on page 7-1.

**Figure 1-1 Proximity Rules in the CMX Engage**



## View Reports

The CMX Engage enables you view the reports that helps you analyze the performance of customers and usage of CMX Engage in your business premises. For more information, see the [“Viewing Reports” section on page 10-1](#).

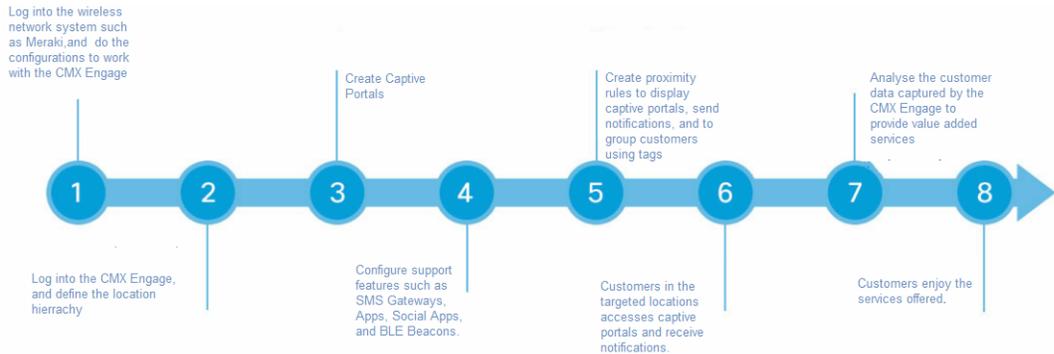
## Create CMX Engage Users

You can create CMX Engage accounts and manage their user privileges using the Team option. For more information, see the [“Managing CMX Engage Users and Accounts” section on page 11-1](#).

## Process Flow

The process flow for the CMX Engage is as shown in [Figure 1-2](#).

**Figure 1-2 Process Flow for the CMX Engage**



## CMX Engage License Packages

The CMX Engage is available in two different license packages namely, Base and Advance. The features available for your account depends on the type of CMX Engage license package you own.

## System Requirements

Before installing the Cisco CMX Engage, ensure that all of the following system requirements are met.

**Table 1-1 System Requirements**

Item	Supported Requirements
Operating System	<ul style="list-style-type: none"> <li>• Microsoft® Windows® XP or later</li> <li>• Mac OS X 10.6 or later</li> </ul>
Browser	Windows OS <ul style="list-style-type: none"> <li>• Internet Explorer version 9 or later</li> <li>• Firefox version 30 or later</li> <li>• Chrome version 34 or later</li> <li>• Safari version 5.1.7 or later</li> </ul> Mac OS <ul style="list-style-type: none"> <li>• Firefox version 30 or later</li> <li>• Chrome version 34 or later</li> <li>• Safari version 5.1.7 or later</li> </ul>
WLC (only for CUWN)	8.0 or later
CMX (only for CUWN-CMX)	8.0 or later

