



## Location Manager

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This chapter describes the user role, Location Manager, and the privileges of a Location Manager.



**Note**

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The Location Manager account is currently available only for Meraki.

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## Location Manager Overview

To ease the management of various locations, the CMX Engage is providing a user role named “Location Manager”. You can create location managers to manage the location metadata and portals for various locations. The location managers can also view location-specific reports to analyze the performance of the location.

## Working as a Location Manager

Before starting working as a location manager, the location manager must do certain configurations in the Meraki dashboard. For more information on the configurations required in the Meraki network, see [Configurations Required in Meraki for Location Manager, page 14-2](#).

A location manager can manage the following features for the location for which the access rights are provided:

- [Metadata, page 14-2](#): Create and manage the metadata for the locations.
- [Portals, page 14-3](#): View and edit the existing portals for the locations.
- [Reports, page 14-4](#): View the report for the locations.

If you log in as a location manager into the CMX Engage dashboard, the locations for which you have access rights will be listed in the left pane of the dashboard. There will be three menus under each location:

- Portal

- Reports
- Config

To view or edit a portal for a location, click the Portal menu for that location. To view the reports for a location, click the Reports for that location. To configure the location metadata, click the Config option.

## Configurations Required in Meraki for Location Manager

Before using the CMX Engage dashboard for managing locations, the location Manager must do certain configurations in the Meraki dashboard.

To work as a location manager, in the Meraki dashboard, perform the following steps:

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- Step 1** Log in to <https://meraki.cisco.com>
- Step 2** Choose **Organization > Configuration templates**.
- Step 3** In the Configuration templates page that appears, click **Create a new template**.
- Step 4** In the Create a new configuration template window that appears, enter the following details:
- From the first drop-down list, click **Create New**.
  - In the Template name field, enter the name “**Location Manager Template**”, and click **Add**.
- The “Select networks to follow “Location Manager Template”” window appears.
- Step 5** In the Target networks drop-down list, choose your primary network.




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**Note** Group policies and other client-specific policies and authorizations on the target network(s) will be permanently removed upon binding. After creating the new template, configure those policies in the new template.

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- Step 6** Click **Bind**.
- Step 7** In the “Configuration templates list > Location Manager Template” that appears, click **Save Changes**.  
The newly created template, **Location Manager Template**, gets listed in the Configuration Templates page.
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## Metadata

The location manager can create location metadata for the locations for which the access rights are provided. The location manager can also edit existing location metadata.

The Location Manager can define or edit the value for the following metadata in the respective fields:

- Brand Name
- Store Address
- Phone Number

If you are a location manager, and if you want to create or edit the location metadata for your locations, perform the following steps:

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- Step 1** Log in as a location manager.
- Step 2** In the CMX Engage dashboard, click the location for which you want to define the location metadata.
- Step 3** Click **Config**.
- Step 4** In the Brand Name field, enter the brand name for the location.
- Step 5** In the Store Address field, enter the store address.
- Step 6** In the Phone Number field, enter the phone number for the store.
- Step 7** Click **Save**.



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**Note** If any other log in is replacing the values for these variables, the lately defined value is considered.

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## Portals

The Location Manager can view the portals created for the locations for which the access rights is provided, and edit those portals. This helps you to easily manage the location-specific content for the portals.



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**Note** The location manager cannot create portals.

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The Location Manager can edit the following modules in the captive portal:

- Welcome Message
- Notice
- Promos and Offers
- Get Internet

In the Portal, the basic portal configurations for the modules, Welcome Message, Notice, and Get Internet, appear in the disabled mode. The location manager can edit the Welcome Message, Notice, and Get Internet modules using the Customize button. If the location manager customizes these modules, the edited content is shown to the customers. The location manager can reverse to the basic configuration using the Reset button.

For the “Promos and Offers” module, the location manager cannot overwrite the basic promotions and offers. The location manager can append new promotions using the “Add a Promotion” button. The basic promotions, and the promotions newly added by the location manager are shown to the customer.



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**Note** If the Account Admin turns off any of the preceding modules in a portal using the ON/OFF swap button, that module will not be available for the location manager. If the location manager turn off a module in a portal, that module will not be visible for the customers for that location. However, the Account Admin can view that module in the dashboard.

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## Previewing the Changes to the Portal

The changes made in the portal by the location manager is shown in the preview of the portal that appears at the right end of the CMX Engage dashboard. The location manager also has the option to e-mail the preview URL or to share the QR code of the portal. The preview URL or QR code shared by the location manager reflects the changes made by the location manager.



### Note

The changes made by the location manager are not reflected in the preview URL or QR Code shared by other CMX Engage logins.

## Reports

The location manager can view the reports for a location to which the access rights is provided.

To view the report for a location, in the CMX Engage dashboard, click the Reports menu under that location.

You can specify the period for which you want to view the report. By default, the report displays the data from the time on which you have installed the CMX Engage.

The location manager reports has the following sections:

- **Devices Connected**-The total number of unique devices that have connected to your Wi-Fi and viewed the captive portal from this location.
- **Devices Acquired**- The total number of unique devices that have connected to your Wi-Fi and have accepted the terms and conditions for the captive portal from this location.
- **Devices Opted In**-The total number of unique devices opted in for subscription from this location. For more information on opted in users, see the [“Opted In Users” section on page 7-6](#).



### Note

The devices that have attempted for a social or e-mail authentication, and opted in for subscription, but couldn't successfully complete the authentication process are also considered.

**Users Acquired**-The total number of unique customers that are identified by the CMX Engage and have accepted the terms and conditions for the captive portal from this location. If the customer uses the same identity such as mobile number on multiple devices for the internet access, then only one user acquisition will be considered. For example, if the customer provides the same mobile number for authentication across 3 devices, it will be considered as one user acquire.

- [Customer Acquisition Report, page 14-4](#)
- [Captive Portal Engagement, page 14-7](#)

### Customer Acquisition Report

The Customer Acquisition report displays the customer details acquired for the specified period from this location.

The customer acquisition report includes the following:

- **Customer Acquisition Graph**- This graph displays the following details for each day in the selected period from this location. The total count for the specified period is displayed in the left side of the graph.

- **Devices Connected**-The total number of devices that have connected to your Wi-Fi and viewed the captive portal from this location.
- **Devices Acquired**- The total number of unique devices connected to the Wi-Fi and have accepted the terms and conditions for the captive portal from this location.
- **Devices Opted In**-The total number of unique devices opted in for subscription from this location. For more information on opted in users, see the “[Opted In Users](#)” section on page 7-6.

**Note**


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The devices that have attempted for a social or e-mail authentication, and opted in for subscription, but couldn't successfully complete the authentication process are also considered.

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- **Users Acquired**- The total number of unique customers that are identified by the CMX Engage and have accepted the terms and conditions for the captive portal from this location. If the customer uses the same identity such as mobile number on multiple devices for the internet access, then only one user acquisition will be considered. For example, if the customer provides the same mobile number for authentication across 3 devices, it will be considered as one user acquire.

The following details are shown on the left side of the graph.

- **New Devices Connected**-The total number of new devices that have connected to your Wi-Fi and viewed the captive portal during the specified period from the location.
- **Devices Acquired**- The total number of unique devices connected to the Wi-Fi and have accepted the terms and conditions for the captive portal during the specified period from the location.
- **Devices Opted In**-The total number of unique devices opted in for subscription during the specified period for the location. For more information on opted in users, see the “[Opted In Users](#)” section on page 7-6.

**Note**


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The devices that have attempted for a social or e-mail authentication, and opted in for subscription, but couldn't successfully complete the authentication process are also considered.

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- **Users Acquired**- The total number of unique customers that are identified by the CMX Engage and accepted the terms and conditions for the captive portal during the specified period from the location. If the customer uses the same identity such as mobile number on multiple devices for the internet access, then only one user acquisition will be considered. For example, if the customer provides the same mobile number for authentication across 3 devices, it will be considered as one user acquire.

- **User Profile**

- **Total Users**- Denotes the total number of unique customers who have completed the authentication from the location by providing any type of personal identity such as phone number, e-mail ID, and so on.
- **Tag Pie Chart**-Displays the percentage of tagged and untagged customers among the Total Users for the location. The percentage of the tagged customers is shown in the middle of the chart. The number of tagged and untagged customers are also shown.
- **Male/Female Pie Charts**- Displays pie charts with the percentage of male and female customers within the tagged customers. The number of male and female customers are also shown.

- **Tags Added**- Displays the pie chart for the tags with highest number of customers. The pie chart for a tag denotes the percentage of customers with in the Total Users that belong to that tag. The total number of customers for each tag is also displayed at the bottom of the respective pie chart. If a customer belongs to more than one tag, that customer is counted for all those tags.
- **Captured Data**- This section displays the personal details of the customers such as e-mail address, phone numbers, name, and gender details captured for the specified period from the location. You can capture the data through the Data Capture form (available for “SMS with password verification” and “Email” authentications) or a social authentication without a Data Capture form, provided the customer has given access to the personal details.
  - Emails- The total number of unique e-mail addresses captured during the specified period from the location.
  - Phone Numbers- The total number of unique phone numbers captured during the specified period from the location.
  - Names- The total number of devices from which the names (first name/last name) are captured during the specified period from the location.
  - Gender- The total number of devices from which gender is captured during the specified period from this location.

## User Activity

The user activity report includes the following:

### User Activity Graph

– **User Per Day/Visits Per Day**: The user activity map displays the number of customers visited the location (users per day) and the number of visits made to the location (visits per day) for each day in the selected period for the location. The color indicators for each of these parameters are displayed at the top right of the graph.

The following details are shown on the left side of the graph.

- **Total Distinct Users** - The total number of unique customers who have visited the location during the specified period. If the authentication type used does not support identifying a customer, the number of unique devices visited is considered.
- **Daily Active Users**- The average number of customers with Wi-Fi “ON” per day in the location for the specified period.
- **Total Visits** - The total number of visits made to the location during the specified period. A customer may make more than one visit.

## Dwell Time

Displays a pie chart that shows the duration of each visit in the location during the specified period. The average dwell time is displayed in the center of the pie chart. This section also shows the number of visits for various dwell time ranges. For example, the count for >8 hrs represents the number of visits that spent greater than 8 hours.

## Number of Visits- Unique Users

Displays a pie chart that shows the number of visits made by each unique customer in the location during the specified period. The average number of visit by a unique customer is displayed in the center of the pie chart. This section also shows the number of visits for various visit ranges. For example, the count for 1 VISIT represents the number of unique customers who have visited the location only once during the specified time period.

## Captive Portal Engagement

The Engagement report shows the details of engagement by the customers in the captive portals configured for this particular location.

The report includes the following details:

- **New VS Returning Devices-** The bar graph displays the total number of new devices and the returning devices (the devices that have previously connected to your SSIDs from the location) that have connected to the SSIDs configured for the location on each day.
- **Welcome Page Views -** The total number of times the customers accessed the captive portal and viewed the welcome page during the specified period from the location.[Before internet provisioning]
- **Internet Provisioned-**The total number of customers who could connect to the internet through the captive portal during the specified period from the location.
- **Landing Page Views-** The total number of times the customers accessed and viewed the landing page for the specified period from the location.[After internet provisioning]



### Note

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After the Internet provisioning, if the customer is redirected to an external link, it is not counted for landing page views.

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- **Number of Clicks per Menu Item-** The menu items in the captive portal or captive portals that the customers clicked the most from this location. The percentage of the click for each menu item among the total click is shown as pie chart. The number of click for each of these menu items are also shown below the pie chart.
- **Engagement Rules- Consumer Notifications-** A bar graph that displays the number of notifications sent to the customers through SMS, e-mail, or push notifications using various engagement rules for the specified period from the location. The colors that indicate SMS, E-mail, and App notifications in the bar are shown at the top-right of the graph. Each bar in the graph represents an engagement rule. The total number of SMS, e-mail, and push notifications sent using the engagement rules for the selected period from the location are shown on the left side of the graph.
- **Engagement Rules- Business User Notifications-** A bar graph that displays the number of notifications sent to the business users through SMS, e-mail, or API notifications using various engagement rules for the specified period from the location. The colors that indicate SMS, E-mail, and API notifications in the bar are shown at the top-right of the graph. Each bar in the graph represents an engagement rule. The total number of SMS, e-mail, and API notifications sent using the engagement rules for the selected period from the location are shown on the left side of the graph.

- **Engagement Rule - Profile Tags**- A graph that displays the total number of customers tagged or removed from the tags using various profile rules during the specified period from the location. Each bar in the graph represents a profile rule. The total number of customers tagged and the customers untagged through various profile rules are shown on the left side of the graph.

## Creating a Location Manager

The Account Admin can invite a user as a location manager.

To create a Location Manger, perform the following steps:

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- Step 1** In the CMX Engage dashboard, click **Team**.
- Step 2** Click **Invite a User**.  
The Invite a User window appears.
- Step 3** In the Email field, enter the e-mail ID of the location manager.
- Step 4** From the Privileges drop-down list, choose **Location Manager**.
- Step 5** Specify the location for which the location manager must have access privileges:
- If you want to provide the access rights to existing locations, choose the **Existing Locations** radio button. Click **Choose Locations** that appears, and select the locations for which you want to provide access to this location manager, and click **Done**.
  - If you want to provide the access rights for a new location, choose the **New Location** radio button. Click **Create Location** that appears. In the location name field that appears, enter the name for the location. Select the location under which you want to create the new location, and click **Done**.



**Note**

You can add more new locations using the Create New Location button.

- Step 6** Click **Send Invitation**.



**Note**

To send the invite, you must connect to Meraki. If you are adding new locations for the location manager, you must connect to a Meraki account that has admin rights in the Meraki dashboard.



**Note**

To invite an existing location manager for a new location, you must re-invite the user using the 'Invite' button.

## Activating a New Location

If a new location is created for a location manager, the location manager has to activate those locations to proceed further using the CMX Engage dashboard.

If you are a location manager, to activate a new location created for you, perform the following steps:

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- Step 1** Click **Accept Invitation** in the invitation e-mail.
  - Step 2** In the Sign up window, enter the login credentials, and click **Activate Account**.
  - Step 3** Log in to the CMX Engage.
  - Step 4** In the left pane of the dashboard, click a new location that you want to activate.
  - Step 5** Click the **Activate Location** button that appear for the location in the right pane of the dashboard.
  - Step 6** In the Address window that appears, enter the address of the location where the access points are located, and click **Next**.
  - Step 7** In the Add Access Points window that appears, enter the serial numbers of the access points to be assigned for the location.
  - Step 8** Click **Activate**.  
After successful activation, the message “Access Points Added” is shown.
  - Step 9** Click **Done**.  
A location is created in Meraki. The location name also gets added to the CMX Engage database, and is displayed in the location hierarchy.
  - Step 10** If there are more new locations to activate, click that new location in the left pane of the dashboard that you want to activate. Repeat step 6 to step 9 for each new location.
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Now the location manager can manage the metadata and portals for the new locations assigned. Also, the location manager will have the option to view the reports for these locations.

