



## Defining the Profile Rules to Manage Tags

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The Tags are used to group the customers to enable you to apply the proximity rules for a set of customers. You can categorize the customers using tags to display the captive portal or to send notifications. You can group a customer under multiple tags.

You can use the profile rule to create tags, to add more customers to the existing tags, or to remove certain customers from an existing tag.

When you are creating a tag, you can use the existing tags to filter the customers from the selected locations. For example, if you want to create a tag with location A and location B, but only for android users, you can use the tag filter to remove the tag for iOS.

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## Creating or Modifying Tags Using a Profile Rule

To create a tag or to include the customers to or exclude the customers from an existing tag, perform the following steps:

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- Step 1** In the CMX Engage dashboard, choose **Proximity Rules**> **Profile Rule**.
  - Step 2** Click **Create a new rule**.
  - Step 3** In the Rule Name text field, enter a name for the profile rule.
  - Step 4** In the Sense area, from the “When a user is on” drop-down list, choose whether you want to filter the customers for the rule based on the customer’s connectivity to the Wi-Fi or access to the BLE Beacon. For more information on configuring the sense type for the profile rule, see the [“Sense Type for the Profile Rule” section on page 7-6](#).
  - Step 5** In the Locations area, specify the locations of which you want to filter the customers for the rule.  
You can choose the entire customer name or single or multiple locations such as group, campus, building, floor, or zone. You can add the locations of both CUWN and Meraki. For more information on defining the location hierarchy, see the [“Defining the Location Hierarchy” section on page 3-2](#).  
You can again filter the locations based on the metadata defined for the selected location or its parent or child locations. For more information on configuring the metadata for the locations, see [“Defining or Editing Metadata for a Location” section on page 3-20](#). You can either choose the locations with a

particular metadata or exclude the locations with a particular metadata. For more information on configuring the location for the profile rule, see the [“Location Filter for the Profile Rule” section on page 7-7](#)

**Step 6** In the IDENTIFY area, specify the type of customers that you want to filter for the rule.

**Note**

You can filter the customers based on whether the customer is an opted in or not opted in user, the tags the customers belong to, the number of visits made by the customer, and the status of the app in the customer’s device. You can apply all these filters or any of them based on your requirement.

To specify the customers whom you want to filter for the rule, perform the following steps:

- a. If you want to filter the customers by the Opt In Status, select the **Filter by Opt-In Status** check box, and choose whether you want to filter the opted in users or not opted in users for the rule.

**Note**

For more information on opted in users, see the [“Opted In Users” section on page 7-6](#).

- b. If you want to filter the customers based on the tags, select the **Filter by Tags** check box.

**Note**

You can filter the customers by including or excluding existing tags. You can filter the tags in two different ways. Either you can specify the existing tags of which you want to include the customers for the rule or the existing tags of which you want to exclude the customers for the rule. You can choose the best filtering method based on your requirement. For example, if you want to add the customers of all the existing tags except one tag, it is easy to opt the exclude option, and mention that particular tag of which you want to exclude the customers.

For more information on using the tag filter, see the [“Filtering by Tag” section on page 7-4](#).

- c. If you want to filter the customers based on the number of visits made by the customer in the selected locations, select the **Filter by Previous Visits** check box.

Click the **Add Locations** button. In the “Choose location” window, specify the locations of which the customer visit needs to consider for filtering. In the following fields, mention the number of visits and duration required to be met by the customers to be filtered for the rule. For more information on the visits and duration you can configure, see the [“Previous Visit Criteria” section on page 6-9](#).

- d. If you want to filter the customers based on the customer’s app status, select the **Filter by App Status** check box, and choose whether you want to filter the app user or non app user for the rule.

**Step 7** In the Schedule area, specify the period for which you want to apply the rule for filtering the customers.

**Note**

Only those customers who meet the preceding conditions during the period specified are filtered for the rule.

- a. Select the “Set a date range for the rule” check box, and in the fields that appear, specify the start date and end date for the period for which you want to apply the profile rule.
- b. Select the “Set a time range for the rule” check box and in the fields that appear, specify the time range for which you want to apply the profile rule.
- c. If you want the rule to be executed only on particular days, select the “Filter by days of the week” check box, and from the list of days that appears, click the days on which you want to apply the rule.

- Step 8** In the Actions area, specify whether you want to create a new tag by including or excluding the customers filtered based on the preceding conditions, or to include or exclude the filtered customers from an existing tag.
- a. Click the **Add Tags** button.
    - If you want to add or remove the filtered customers from the existing tags, mention the tags to which you want to include the filtered customers and the tags from which you want to exclude the filtered customers.
      - To add the customers that are filtered based on this profile rule to an existing tag, choose the Add radio button for the tags to which you want to add the customers.
      - To remove the customers that are filtered based on this profile rule from an existing tag, choose the Remove radio button for the tags from which you want to remove the customers.



**Note** In the Choose Tags window, you can search for a tag using the Search option. You can also clear a selected tag using the Clear Selection option for that tag. The tags selected are displayed on the right side of the window.

- If you want to create a new tag with the rule, click the **Create New Tag** button. In the New Tag field that appears, enter a name for the tag, and click **Add**. The newly created tag gets listed in the tag list.
- b. Click **Done**.



**Note** Using a profile rule, you can create a tag by including or excluding the filtered customers, or you can modify an existing tag by including or excluding the filtered customers, simultaneously. You can also create more than one tag for a rule.



**Note** The summary of the rule is shown on the right side of the page.

**Step 9** Click **Save and Publish**.

The rule gets published and listed in the Profile Rules page.



**Note** If you do not want to publish the rule now, you can click the Save button. You can publish the rule at any time later by clicking the Save and Publish button. Also, you can publish the rule by clicking the Make Rule Live icon at the far right of the rule in the Profile Rules page.

## Use Case- Profile Rule

ABC hotel group as part of its 25th anniversary, wants to provide some special gifts to its platinum loyalty members. ABC considers all the customers who had visited its hotels at location A or location C minimum 10 times in the last 2 years as platinum loyalty members. All the visitors who have connected to the Wi-Fi atleast 45 minutes are to consider as customers. ABC wants to create a tag for its platinum loyalty members. The opted in customers who meet the previous conditions within the end of the current month are to add to the tag.

To meet the preceding scenario, perform the following steps:

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- Step 1** Log in to CMX Engage.
  - Step 2** Create the location hierarchy with all the locations of ABC.
  - Step 3** In the CMX Engage dashboard, choose **Proximity Rules > Profile Rule**.
  - Step 4** Click **Create a new rule**.
  - Step 5** In the RULE NAME field, enter a name for the profile rule.
  - Step 6** From the “When a user is on” drop-down list, choose **WiFi, Present at Location**, and from the drop-down list that appears, choose **45 Minutes**.
  - Step 7** In the Locations area, click the **Add Locations** button, and select location A, and location C.
  - Step 8** In the IDENTIFY area, do the following:
    - a. Select the Filter by OptIn Status check box, and choose **Only for opted-in Visitor**.
    - b. Select the **Filter by Previous Visits** check box, and click the **Add Locations** button, and add Location A, and Location C.
    - c. In the following fields, choose **At least, 10** times in, and **Date Range**.
    - d. In the date range fields, enter the start date and end date for the last two years.
  - Step 9** In the Schedule area, select the “Set a date range for the rule “check box, and specify the start date as today’s date and end date as last date of the current month.
  - Step 10** In the Actions area, do the following:
    - a. Click the **Add Tags** button.
    - b. In the Create Tags window, Click **Create New Tag**.
    - c. In the New Tag field, enter **Platinum1**, in the tag list choose the **Add** radio button for Platinum1, and click **Done**.
  - Step 11** Click **Save and Publish**.
- The profile rule is published.
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## Filtering by Tag

You can either opt to include or exclude the tags for filtering.

### Including a Tag

To include a tag, perform the following steps:

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- Step 1** In the “Filter by Tags” area of the proximity rule (captive portal rule, engagement rule, profile rule), click the **Add Tags** button for “Include”.
  - Step 2** In the “Choose Tags” window, click the **Include** radio button for the tag that you want to include.
  - Step 3** Click **Done**.
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## Excluding a Tag

To exclude a tag, perform the following steps:

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- Step 1** In the “Filter by Tags” area of the proximity rule (captive portal rule, engagement rule, profile rule), click the **Add Tags** button for “Exclude”.
  - Step 2** In the “Choose Tags” window, click the **Exclude** radio button for the tag that you want to exclude.
  - Step 3** Click **Done**.
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## Searching for a Tag

To search for a tag, perform the following steps:

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- Step 1** In the window to create a new rule, in the Filter by Tags area, click the **Add Tags** button for Include or Exclude.
- Step 2** In the Choose Tags window, enter the name of the tag that you want to search.  
The tag list gets filtered with the search results.
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## Clearing a Tag

If you choose an include or exclude radio button for a tag, you can clear the selection using the **Clear Selection** option for that tag.

## Opted In Users

The CMX Engage enables you to provide an option in the captive portal for the customers to opt out from the notification subscriptions.

In the portal, select the “Allow users to opt in to receive message” check box to provide an option for the customers to opt for the subscriptions. The option “Allow users to opt in to receive message” is available for the authentication types “SMS with password verification” or “Email”.

By default, the customers are opted in for subscription. The customers can opt out from subscription when accessing the captive portal. When a customer accesses the captive portal by connecting to an SSID, the opt in check box is displayed to the customer.

## Sense Type for the Profile Rule

- a. If you choose “WiFi”, an additional field appears where you can choose any of the following:
  - Entering Location- The customer connected to the Wi-Fi when enters the location is filtered for the rule.
  - Exiting Location- The customer connected to the Wi-Fi when exits the location is filtered for the rule.
  - Present at location- The customer who is present at the location with connected to the Wi-Fi during a specified time or a specified duration is filtered for the rule. If you choose this option, additional fields appear where you can mention the duration or time that needs to meet by the customer to get filtered.
- b. If you choose “Beacon”, an additional field appears where you can choose any of the following:
  - Beacon Enter-The customer who enters the beacon premises is filtered for the rule.
  - Beacon Exit- The customer who exits the beacon premises is filtered for the rule.
  - Present at location- The customer who is present at the beacon premises during a specified time or a specified duration is filtered for the rule. If you choose this option, additional fields appear where you can mention the duration or time that needs to meet to filter for the rule.

## Location Filter for the Profile Rule

To specify the locations, perform the following steps:

- a. Click the **Add Locations** button.
- b. In the Choose Location window that appears, select the locations for the profile rule.
- c. Click **OK**.

You can again filter the locations using the metadata defined for the locations. Only the metadata defined for the selected locations and their parent or child locations will be available for selection.

To include a locations with a particular meta data, perform the following steps:

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- Step 1** Select the **Filter by Metadata** check box.
  - Step 2** In the Filter area, click the **Add Metadata** button.  
The Choose Location Metadata window appears.
  - Step 3** From the drop-down list, choose the metadata variable, and choose the value for the variable in the adjacent field.
  - Step 4** Click **Done**.
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To exclude a location with a particular meta data, perform the following steps:

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- Step 1** Select the **Filter by Metadata** check box.
  - Step 2** In the Exclude area, click the **Add Metadata** button.  
The Choose Location Metadata window appears.
  - Step 3** From the drop-down list, choose the metadata variable, and choose the value for the variable in the adjacent field.
  - Step 4** Click **OK**.
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## Managing the Profile Rules

You can pause a profile rule, and make it live again, whenever required. You can modify a profile rule, and delete it if required. You can create profile rules specific to a location, and view them from the location hierarchy.

- [Pausing an Profile Rule, page 7-8](#)
- [Restarting a Profile Rule, page 7-8](#)
- [Modifying a Profile Rule, page 7-8](#)
- [Deleting a Profile Rule, page 7-9](#)
- [Viewing a Profile Rule for a Location, page 7-9](#)

## Pausing an Profile Rule

To pause a profile rule, perform the following steps:

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- Step 1** In the CMX Engage dashboard, choose **Proximity Rules > Profile Rule**.  
The profile rules created get listed.
- Step 2** Click the **Pause Rule** icon that appears at the far right of the profile rule that you want to pause.  
The profile rule is paused.
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**Note**

To pause multiple profile rules, select the check box for the profile rules that you want to pause, and click the Pause button that appears at the bottom of the page.

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## Restarting a Profile Rule

To restart a profile rule, perform the following steps:

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- Step 1** In the CMX Engage dashboard, choose **Proximity Rules > Profile Rule**.  
The profile rules created get listed.
- Step 2** Click the **Make Rule Live** icon that appears at the far right of the profile rule that you want to restart.  
The profile rule is restarted.
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**Note**

To restart multiple profile rules, select the check box for the profile rules that you want to restart, and click the “Make Live” button that appears at the bottom of the page.

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## Modifying a Profile Rule

To modify a profile rule, perform the following steps:

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- Step 1** In the CMX Engage dashboard, choose **Proximity Rules > Profile Rule**.  
The profile rules created get listed.
- Step 2** Click the **Edit Rule** icon for the profile rule that you want to modify.
- Step 3** Make necessary changes.
- Step 4** To save the changes, click **Save** or to publish the changes, click **Save and Publish**.



**Note**

A live rule will have only the Save and Publish option. When you click the Save and Publish button, the rule gets published with the changes.

## Deleting a Profile Rule

To delete a profile rule, perform the following steps:

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- Step 1** In the CMX Engage dashboard, choose **Proximity Rules > Profile Rule**.  
The profile rules created get listed.
- Step 2** Click the **Delete Rule** icon that appears at the far right of the profile rule that you want to delete.
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**Note**

To delete multiple profile rules, select the check box for the profile rules that you want to delete, and click the Delete button that appears at the bottom of the page.

## Viewing a Profile Rule for a Location

To view an profile rule for a location such as group, building, floor, and so on, perform the following steps:

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- Step 1** In the CMX Engage dashboard, choose **Manage Locations**.  
The Locations page appears with the location hierarchy.
- Step 2** Click the **Proximity Rules** icon for the location for which you want to view the profile rule.
- Step 3** Click the **Profile Rule** tab.  
The profile rules for the location gets listed.
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**Note**

The "Proximity Rules" link for a location is enabled only if atleast one proximity rule exists for that location.

## Profile Rule Report

The Profile Rule report shows the performance of profile rules. It is specific to a profile rule.

To view the Profile Rule report for a profile rule, perform the following steps:

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- Step 1** In the CMX Engage dashboard, click **Proximity Rules > Profile Rule**.

The profile rules defined get listed.

**Step 2** Click the profile rule for which you want to view the Profile Rule report.

The Profile Rule Report for that rule appears.

**Step 3** In the Filter area, choose the period for which you want to view the report.

The report is filtered for the specified period.

The Profile Rule report has the following information.

- **Total Devices Tagged-** The total number of devices tagged for the profile rule from the day on which the profile rule is created.
- **Total Users Tagged-** The total number of customers tagged for the particular profile rule from the day on which the profile rule is created.
- **Total Tags Removed-** The total number of customers removed from the tags mentioned in the profile rule from the day on which profile rule is created.
- [Rule Activity, page 7-10](#)
- [User Insights, page 7-10](#)

## Rule Activity

This section displays the number of customers and devices tagged based on the particular profile rule during the specified period.

- **Tagging Trends-**Displays the total number of devices and customers tagged for the particular rule during the specified period. Also displays the number the customers removed from the tags based on the particular profile rule. The bar graph represents the total number of customers tagged based on the particular rule on each day of the specified period. If the duration specified is less than a week, the data will be shown in a bar graph. If the duration specified is not more than 2 days, the bar graph displays the number of customers tagged at various timings of each day.
- **Device Tags added by Location:** Displays the number of devices tagged from each location during the specified period.
- **Device Tags Removed by Location-** This section will be displayed only if it is specified in the profile rule to remove the filtered devices from a particular tag. The total number of devices untagged from each location based on the particular profile rule during the particular period is shown.
- **Tagging by Time of Day-**This bar graph displays the number of customers added to various tags based on the profile rule, at various timings of a day, during the specified period. This helps in identifying the time at which the customers targeted by this rule visits the targeted locations the most.

## User Insights

This section show the details of the customers who are targeted by the particular profile rule during the specified period.

- **User Profile-** Displays the percentage of male and female customers in the total number of customers tagged by the particular profile rule. The total number of male and female customers are shown near to the corresponding pie chart. Displays the total number of customers tagged to each tag specified in the rule. The pie charts for tags represent the percentage of customers tagged based

on this rule in each tag. The number of tagged customers for each tag is shown below the corresponding pie chart. If the customers tagged for the rule are part of other tags not specified in the rule, those tags are also shown with the number and percentage of those customers.

- **Dwell Time-** The bar graph displays the duration of the visits made in the targeted locations by the customers tagged by the particular rule. The duration of visits for various dwell time ranges are shown. For example, the count for >8 hrs represents the number of tagged customers who has spent greater than 8 hours in the targeted locations. Average dwell time of the customers tagged based on the particular profile rule is shown at the top of the bar graph.
- **Number of Visits-** This bar graph displays the number of times the customers tagged based on the particular profile rule has visited the targeted locations. The number of visits for various visit ranges are shown. The average number of visits made by the tagged customers are shown at the top of the bar graph.

