CHAPTER 12

Configuring the Apps, BLE Beacons, SMS Gateway, and SDK

This chapter describes how to configure the SMS Gateways, apps, and BLE beacons. Also, the option to download CMX Engage SDK, and its Help documents are also included in this chapter.

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Managing the Apps

You can create, rename, modify, or delete the apps that are configured to send the push notifications:

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Configuring the Apps

For push notification, you must configure the apps through which you want to send the push notifications.

✎ **Note** You have to configure the apps only if you want to send the push notifications.

To add an app to the CMX Engage, perform the following steps:

Step 1 In the CMX Engage dashboard, click the Tools icon that appears in the left pane.

Step 2 In the window that appears, click the **Notification Channels** tab.

Step 3   Click **Add Apps**.

Step 4   In the Apps screen that appears, enter the following details:

    a.   In the APP NAME field, enter the name of the app.

    b.   Select the IOS check box if the app is available for the IOS devices.

    c.   In the APP ID text field, enter the ID for the IOS app.

    d.   In the UPLOAD APNS P12 area, upload the APNS P12 for the app.

       You can use the Select File button to upload the file.

    e.   In the UPLOAD APNS CERTIFICATE area, upload the APNS certificate for the app.

       You can use the Select File button to upload the file.

    f.   In the APNS CERTIFICATE PASSWORD text field, enter the password for the APNS certificate.

    g.   Select the ANDROID check box if the app is available for the android devices.

    h.   In the APP ID text field, enter the ID for the android app.

    i.   In the API KEY text field, enter the API key for the android app.

    j.   Click **Save**.

Renaming an App

To rename an app, perform the following steps:

Step 1   In the CMX Engage dashboard, choose the Tools icon in the left pane.

Step 2   Click the **Notification Channels** tab.

The Apps window appears with the list of all the configured apps.

Step 3   Click the drop-down menu icon that appears at the far right of the app that you want to rename.

Step 4   Click **Rename**.

Step 5   In the app name field that is enabled for editing, enter the new name for the app.

Step 6   Click **Rename**.

Modifying an App

To modify an app, perform the following steps:

Step 1   In the CMX Engage dashboard, choose the Tools icon in the left pane.

Step 2   Click the **Notification Channels** tab.

The Apps window appears with the list of all the configured apps.

Step 3   Click the app that you want to modify.

The details of the app is shown.

Step 4   Make necessary changes to the app.

Step 5   Click **Save**.

Deleting an App

To delete an app, perform the following steps:

Step 1   In the CMX Engage dashboard, choose the Tools icon in the left pane.

Step 2   Click the **Notification Channels** tab.

The Apps window appears with the list of all the configured apps.

Step 3   Click the drop-down menu icon that appears at the far right of the app that you want to delete.

Step 4   Click **Delete**.

The app gets deleted.

Note   The Delete option appears for an app only if it is not associated with any proximity rule.

Managing the Social Networking Apps

You can modify the details of the social networking apps configured for the social authentication. The CMX Engage enables you to configure the apps of Facebook, Twitter, and Linked In.

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Adding Social Apps for Social Authentication

To manage authentication to the portals through the social network sites, you need to configure the corresponding social app in the CMX Engage. For example, if you need to authenticate access to a portal for customers that are signed in to Facebook, you need to configure the Facebook app in the CMX Engage. You can add the apps of the following social network sites to the CMX Engage:

- Facebook
- Twitter
- Linkedin

To configure the social apps in the CMX Engage, perform the following steps:

Step 1   In the CMX Engage dashboard, choose the Tools icon in the left pane.

Step 2 Click the **Social Apps** tab.

Step 3 Click the **Add** button corresponding to the social networking site for which you want to configure the app.

The fields for configuring the app appear.

Step 4 Enter the app name, app ID, and app secret key in the respective fields.

Step 5 Click **Save**.

Modifying the Facebook App

To modify the Facebook app, perform the following steps:

Step 1 In the CMX Engage dashboard, choose the **Tools** icon in the left pane.

Step 2 Click the **Social Apps** tab.

Step 3 Click the **Edit** button for the Facebook app.

Step 4 Make necessary changes.

Step 5 Click **Save.**

✎

Note The Edit button is available only if you have added a Facebook app.

Modifying the Twitter App

To modify the Twitter app, perform the following steps:

Step 1 In the CMX Engage dashboard, choose the **Tools** icon in the left pane.

Step 2 Click the **Social Apps** tab.

Step 3 Click the **Edit** button for the Twitter app.

Step 4 Make necessary changes.

Step 5 Click **Save.**

✎

Note The Edit button is available only if you have added a Twitter app.

Modifying the LinkedIn App

To modify the LinkedIn app, perform the following steps:

Step 1 In the CMX Engage dashboard, choose the **Tools** icon in the left pane.

Step 2 Click the **Social Apps** tab.

Step 3 Click the **Edit** button for the LinkedIn App.

Step 4 Make necessary changes.

Step 5 Click **Save.**

Note The Edit button is available only if you have added a LinkedIn app.

Managing the BLE Beacons

You can configure a BLE UUID, and modify or delete a BLE Beacon added to a building or network, floor, or zone.

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- Viewing the BLE Beacons for a Location, page 12-8

Configuring the BLE Beacons

To enable the BLE beacon notifications, you must add the BLE UUIDS and BLE Beacon to the CMX Engage.

Note You have to configure the BLE Beacons only if you want to send the notifications based on proximity to a BLE beacon.

To configure a BLE beacon in the CMX Engage, perform the following steps:

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- Adding a BLE Beacon, page 12-6

Adding a BLE UUID

To add a BLE UUID to the CMX Engage, perform the following steps:

Step 1 In the CMX Engage dashboard, click the **Tools** icon that appears in the left pane.

Step 2 In the window that appears, click the **BLE UUIDs** tab.

Step 3 Click **Add BLE UUID**.

Step 4 In the "Enter BLE UUID Here" text field, enter the UUID for the BLE.

Step 5   Click **Confirm**.

Note   Due to device restrictions, you can configure only 15 UUIDs in the CMX Engage.

Adding a BLE Beacon

The CMX Engage enables you to add the BLE Beacon to a building (Network for Meraki), floor, or zone.

Note   For the same UUID, you can define more than one BLE Beacon with different major and minor numbers.

To add a BLE Beacon to a building or network, floor, or zone, perform the following steps:

Step 1   In the CMX Engage dashboard, choose **Manage Locations**.

The Location window appears.

Step 2   Click the building (Network for Meraki), floor, or zone to which you want to add the BLE Beacon.

Step 3   On the BLE Beacons tab, click **Add BLE Beacon**.

Step 4   In the Add BLE Beacon window that appears, perform the following steps:

    a.   From the BLE Beacon UUID drop-down list, choose the BLE Beacon UUID.

       For more information on adding the Beacon UUID to the CMX Engage, see the "Adding a BLE UUID" section on page 12-5.

    b.   In the BLE Beacon Name text field, enter the name of the BLE Beacon.

    c.   In the Manufacturer text field, enter the name of the Beacon manufacturer.

    d.   From the Major Version drop-down list, choose the major version value for the BLE beacon.

    e.   From the Minor Version drop-down list, choose the major version value for the BLE beacon.

    f.   Click the **Advanced** link to configure additional details of the beacon, if required.

    g.   From the Max RSSI selection list, choose the maximum received signal strength indication for the BLE beacon.

    h.   From the Min RSSI selection list, choose the minimum received signal strength indication for the BLE beacon.

    i.   From the Latitude selection list, choose the latitude at which the BLE Beacon resides in the global map.

    j.   From the Longitude selection list, choose the longitude at which the BLE beacon resides in the global map.

    k.   From the X Coordinates selection list, choose the X coordinate for the BLE beacon in the floor.

    l.   From the Y Coordinates selection list, choose the Y coordinate for the BLE beacon in the floor.

    m.   Click **Add**.

Deleting a Beacon UUID

To delete a beacon UUID, perform the following steps:

Step 1   In the CMX Engage dashboard, click the Tools icon in the left pane.

Step 2   Click the **BLE UUIDs** tab.

Step 3   Click **Delete** corresponding to the BLE UUID that you want to delete.

The BLE UUID gets deleted.

✎ **Note**   You cannot delete a UUID that is associated with any BLE Beacon. That is, to delete a UUID, first you must delete all the BLE Beacons associated with that UUID.

Modifying a BLE Beacon

You can assign a BLE beacon to an entire building (network for Meraki), floor, or zone.

To modify a BLE beacon in a building (network for Meraki), floor, or zone, perform the following steps:

Step 1   In the CMX Engage dashboard, choose **Manage Locations**.

The Locations page appears with the location hierarchy.

Step 2   In the location hierarchy, click the BleBeacons icon for the building (network for Meraki), floor, or zone of which you want to modify the BLE Beacon.

The BLE Beacons page appears with the list of all BLE Beacons added to that building (network for Meraki), floor, or zone,

Step 3   Click the BLE Beacon that you want to modify.

The Edit BLE Beacon window appears.

Step 4   Make the necessary changes to the BLE Beacon.

Step 5   Click **Save**.

Deleting a BLE Beacon

To delete a BLE Beacon from a building, floor, or zone, perform the following steps:

Step 1   In the CMX Engage dashboard, choose **Manage Locations**.

The Locations page appears with the location hierarchy.

Step 2   In the location hierarchy, click the BLEBeacons icon for or the building (network for Meraki), floor, or zone from which you want to delete the BLE Beacon.

The BLE Beacons page appears with a list of all the BLE Beacons added to that building, floor, or zone.

Step 3   Click the **Delete** button corresponding to the BLE Beacon that you want to delete.

The BLE Beacon gets deleted successfully.

Viewing the BLE Beacons for a Location

Usually, BLE Beacons are configured at floor or zone level.

To view the BLE beacons for a location, perform the following steps:

Step 1   In the CMX Engage dashboard, choose **Manage Locations**.

The Locations page appears with the location hierarchy.

Step 2   In the location hierarchy, click the BleBeacons icon for the location for which you want to view the BLE beacons. For example, to view the BLE Beacons in a floor, click the **BleBeacons** icon for that floor.

The BLE beacons associated with that location are displayed.

Note   The "Blebeacons" link for a location is enabled only if atleast one BLE beacon is configured for that location.

Configuring an SMS Gateway in the CMX Engage

To send SMS notifications, and to manage the portal authentication through SMS, you must configure SMS gateways. The CMX Engage enables you to use the SMS Gateways of third-party vendors. To configure an SMS gateway in the CMX Engage, perform the following steps:

Step 1   In the CMX Engage dashboard, choose the Tools icon in the left pane.

Step 2   Click the **SMS Gateway** tab.

Step 3   Click **Add SMS Gateway**.

Step 4   From the SMS Gateway Type drop-down list, choose the SMS Gateway type that you want to use.Additional fields appears based on the SMS Gateway type selected.

The CMX Engage supports the following SMS Gateway types:

- DATAMETRIX
- MGAGE
- NYY
- PANACEA MOBILE
- REASON8
- SMPP
- TROPO
- TRU
- TWILIO

- WATERFALL

Step 5   In the additional fields that appear based on the SMS Gateway type selected, specify the required values.

Step 6   Click **Save**.

> **Note**   The SMS Gateways created appears for selection in the SMS Gateway drop-down list for "SMS with password verification" and "SMS with link verification" authentication options in the portal. These SMS gateways also are available for selection when configuring the SMS notifications in the Engagement Rule.

Modifying the SMS Gateway

To modify an SMS gateway, perform the following steps:

Step 1   In the CMX Engage dashboard, choose the **Tools** icon in the left pane.

Step 2   Click the **SMS Gateway** tab.

Step 3   Click the **Edit** button for the SMS Gateway that you want to modify.

The SMS Gateway dialog box appears.

Step 4   Make the necessary changes.

Step 5   Click **Save**.

Downloading CMX Engage SDK

To avail certain features in the CMX Engage, you must integrate your app with CMX Engage SDK. You can download this app from the CMX Engage dashboard, and integrate it with your app. You can also download the Help documentation that describes how to integrate the SDK with your app.

The SDK option is available in the CMX Engage dashboard only if you have the SDK license.

The SDK app integration is required to use the BLE Beacons and Apps in the Engagement Rule to send notifications.

To download the CMX Engage SDK, perform the following steps:

Step 1   In the CMX Engage dashboard, click the **Tools** icon in the left pane.

Step 2   Click the SDK tab.

The SDK window contains the SDK for both iOS and android apps.

Step 3   Click the download option for the type of app for which you want the SDK.

Step 4   Save the SDK on your system.

Step 5   Integrate it with the app based on instructions provided in the Help documentation.

Note   You can access the SDK credentials by clicking the Copy SDK Credentials button.

Note   You can download the Help documentation for iOS or android app by clicking the Help button for the respective app.

Connecting to the Meraki Network

You need to connect to the Meraki network to define the location hierarchy.

To connect to the Meraki, perform the following steps:

Step 1 In the CMX Engage dashboard, click the Wi-Fi icon that appears in the left pane.

The Meraki Settings dialog box appears.

Step 2 Click **Connect account**.

Step 3 Enter the username and password for your Meraki account, and click **Connect account**.

Step 4 In the Connect Account screen that appears, click **Continue**.

Now, the CMX Engage is connected to the Meraki network specified.

You can disconnect from a Meraki account and connect to a different Meraki account using the Wi-Fi icon.