CHAPTER 6

Defining the Profile Rules to Manage Tags

The Tags are used to group the customers to enable you to apply the proximity rules for a set of customers 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, 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.

Creating Tags or Including or Excluding the Customers from an Existing Tag 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:

Step 1 In the WiFi 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.

  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.

– Far - The customer who is within the beacon premises but far from the BLE beacon is filtered for the rule.

– Near- The customer who is near to the BLE beacon is filtered for the rule.

– Immediate- The customer who is very close to the BLE Beacon is filtered for the rule.

– Present at location- The customer who is present at the location 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.

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 Meraki customer name or to single or multiple Meraki Organization, group, location, floor, or zone. For more information on creating a location, see the "Defining the Location Hierarchy" section on page 3-2.

You can again filter the selected locations based on the metadata defined for the location or its parent or child locations. For more information on configuring the metadata for the locations, see the "Defining Metadata for a Location Element" section on page 3-6. You can filter the selected locations by specifying the location metadata to include or by specifying the location metadata to exclude.

To specify the locations, perform the following steps:

a. Click the **+** button.

b. In the Choose Location window that appears, select the locations in which you want to apply the profile rule.

c. Click **OK**.

In the selected locations, to filter the customers only of the location elements with a particular location metadata, perform the following steps:

Step 1 Select the **Filter by Metadata** check box.

Step 2 In the Filter area, click the **+** button.

The Enter Location Metadata window appears.

Step 3 From the drop-down list, choose the metadata variable, and enter the value for the variable in the adjacent field.

Note   The location metadata defined for the selected locations and its parent and child locations are available for selection.

Step 4 Click **OK**.

In the selected locations, to exclude the customers of the location elements with a particular location metadata, perform the following steps

Step 1 Select the **Filter by Metadata** check box.

Step 2 In the Exclude area, click the **+** button.

The Choose Location Metadata window appears.

Step 3 From the drop-down list, choose the metadata variable.

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> **Note**   The location metadata defined for the selected locations and its parent and child locations are available for selection.

Step 4   Click **OK**.

Step 5   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 OptIn Status check box, and from the Only for drop-down list, choose whether you want to add 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 6-7.

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  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 expect one tag, it is easy to opt the exclude option, and mention that particular tag of which you want to exclude the customers.

     – To mention the tags to be included, use the **+** button for "Include".

     – To mention the tags to be excluded, use the **+** button for "Exclude".

    For more information on using the tag filter, see the "Filtering by Tag" section on page 6-6.

  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 Visits** check box.

    Click the **+** button. In the Choose location window, select the locations of which the customer visit needs to consider for filtering. In the following fields, mention the number of visits and duration required by the customers to be filtered for the rule. For more information on the visits and duration you can configure, see the "Notification Criteria" section on page 5-17.

  d. If you want to filter the customers based on the customer's app status, select the **Filter by App Status** check box. From the "Filter by the users who" drop-down list, choose the app status required for the customers to be filtered for the rule.

Step 6   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 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.

    b. 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.

    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 7 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 **+** button for "Choose".

    • 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 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 button for the 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. You can create a new tag either by adding the filtered customers or by removing the filtered customers. In the New Tag field that appears, enter a name for the tag. Choose the **Add** radio button if you want to create a tag by adding the customers filtered based on the profile rule or choose the **Remove** radio button to create a tag excluding the customers filtered based on the profile rule. Click **Save**.

    b. After adding all the required tags, click **OK**.

> **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.

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

Step 8 Click **Save and Resume**.

The profile rule is published.

Example

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 has connected to the WiFi 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:

Step 1   Log in to WiFi Engage.

Step 2   Create the location hierarchy with all the locations of ABC.

Step 3   In the WiFi 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**, and from the drop-down list that appears, choose **45** Minutes.

Step 7   In the Locations area, click the **+** 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 from the Only for drop-down list, choose **Opted In Users**.

    b.   Select the **Filter by Visits** check box, and click the **+** 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 **+** button for Coose.

    b.   In the Create Tags window, Click **Create New Tag**

    c.   In the New Tag field, enter **Platinum1**, choose the **Add** radio button, and click **Save**.

    d.   Click **OK**.

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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:

Step 1   In the window to create a new profile rule, in the Filter by Tags area, click the **+** 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 **OK**.

Excluding a Tag

To exclude a tag, perform the following steps:

Step 1   In the window to create new profile rule, in the Filter by Tags area, click the **+** 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 **OK**.

Searching for a Tag

To search for a tag, perform the following steps:

Step 1   In the window to create a new rule, in the Filter by Tags area, click the **+** 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.

Clearing a Tag

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

Opted In Users

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

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

To display the opt in check box to the customers, in the portal, you must configure the "Allow users to opt in to receive message" check box. You can configure the "Allow users to opt in to receive message" check box for the authentication types "Hard SMS with Verification Code" or "Email".

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