



## Account Management

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The CMX Dashboard enables you to create and assign accounts depending on the product or service.

An Account is an entity that owns the content that is published through the CMX Dashboard. The account contains information of all the events including view, number of clicks of the specific messages, and services.

Account Management allows you to define and set up different set of accounts and users. An Account user is entitled to a role with specific functionality permissions for that role.

The CMX Dashboard Administrator can create an account for a store. Customers can locate stores using the keywords associated with each account. Account information is used while plotting the store in the Floor Navigation.

## Creating an Account

To create a new account, complete the following steps:

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- Step 1** Choose **Accounts** from the left side bar menu.
- Step 2** Click **Create New Account**. The Add/Edit Account and Address group boxes appear.
- Step 3** In the Add/Edit Account group box, do the following:
  - Enter the name of the account in Account Name:\* text box.
  - To upload a logo of the account, click **Click to upload a Logo**. Locate the image file from File Upload dialog box and click **Open**.
  - In the Account Description\* text box, enter the description of the account.
  - Enter the keywords about the account you want to create in the Keyword\* text box. These keywords help locate the store easily when a customer searches on the mobile device browser.
- Step 4** In the Address group box, do the following:
  - Enter the email address of the account in the Email\* text box.
  - Enter the URL of the account in the Website URL\* text box.
  - In the Phone\* text box, enter the phone number of the account.
  - In the text boxes Street Line 1\* and Street Line 2\* enter the address of the account.
  - In the City\* text box, enter the name of the city.
  - In the State\* text box, enter the name of the state.

- Enter the area zip code in the Zip Code\* text box.
- Step 5** Click **Submit**.

## Deleting an Account

To delete a new account, follow these steps:

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- Step 1** Choose Accounts from the left side bar menu. Click **All** to view all the accounts in the CMX Dashboard database. All Accounts group box appears.
- Step 2** In the Active Accounts group box, select the account you want to delete.
- Step 3** Click **Delete**.

## Making an Account active

To make an active account active, follow these steps:

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- Step 1** Choose Accounts from the left side bar menu. Click **Inactive** to view all the accounts in the CMX Dashboard database. Inactive Accounts group box appears.
- Step 2** In the Inactive Accounts group box, select the account you want to reactivate.
- Step 3** Click **Make Active**.

## Making an Account inactive

To make an active account inactive, follow these steps:

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- Step 1** Choose Accounts from the left side bar menu. Click **Active** to view all the accounts in the CMX Dashboard database. Active Accounts group box appears.
- Step 2** In the Active Accounts group box, select the account you want to delete.  
Click **Make Inactive**.

## Roles, Domain and Server Settings

The CMX Dashboard UI provides the feature to organize roles, domain setup and the server settings.

## Roles

To set the roles follow these steps:

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- Step 1** From the left side bar menu, select Settings. Click **Roles**.
  - Step 2** Click **Create New Role**. Select Operations box appears.
  - Step 3** Enter the name of the role category in Name: textbox.
  - Step 4** Enter the name that you want on display in Display Name:
  - Step 5** Choose and change the roles from Available Operations and Existing Operations.
  - Step 6** Click **OK**.
  - Step 7** To edit a role, click the role in the list that appears when you select Settings and click **Roles**.
  - Step 8** Click **Edit**. Change the operations and click **OK**.
  - Step 9** To delete a role, click the role in the list that appears when you select Settings and click **Roles**.
  - Step 10** Click **Delete**.
  - Step 11** Click **OK** in the Delete Confirmation dialog box.

## Domain

To set the domains follow these steps:

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- Step 1** From the left side bar menu, select Settings. Click **Domain Setup**.
  - Step 2** Click **Create New Domain**. Add/Edit Domain group box appears.
  - Step 3** In Domain Name: enter name of the domain.



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**Note** You have to set up key-value mapping for the webpage or domain, before adding it to a Point of Interest.

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- Step 4** In Domain URL: enter the URL of the domain.



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**Note** Please don't use http://

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- Step 5** In Key Handlers: enter the keywords.



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**Note** If more than one key handler, please enter them separated by comma.

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- Step 6** Click **Submit**.

- Step 7** To edit or delete a domain, click the domain in the list that appears in Domain Setups group box when you select Settings and click **Domain Setup**.

**Step 8** Click **OK**.

## Server Settings

To set up the server parameters follow these steps:

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- Step 1** From the left side bar menu, select Settings. Click **Server Settings**.
  - Step 2** Choose the default or MSE in Location Resolver:
  - Step 3** Enter the time in seconds in Location Resolver Stale Time:
  - Step 4** In Campaign Cache Refresh Frequency: enter the time in hours.
  - Step 5** In Campaign Cache DB sync time: enter the time in seconds.
  - Step 6** In Index refresh time: enter the time in seconds.
  - Step 7** In Reports data retention time: enter the number of days you want to retain the data.
  - Step 8** In Default location ID: enter the ID of the location.
  - Step 9** In Banner welcome delay: enter the time period in seconds.
  - Step 10** Choose the collectors of data in BBX Statistic collectors.



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**Note** Default logo is that of Cisco.

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**Step 11** Click **Save**.