



## CRM

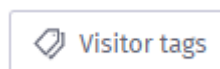
The area shows you an overview of the devices and users that have been seen at your venue. Each user or device has its own 'Profile card' within the system and you can launch this card by clicking on the user or device name. From within the profile card you can access detailed information on the user or device's behaviour, add notes and filter by tags.


By default, the overview will show all data gathered during the last 30 days but this can be changed to a specific date as required.

### Overview

1. The overview by default will display all users and devices that have logged onto the network. The following information is available from the overview screen:
  - **Visitor** – Details about the visitor, either user or device.
  - **Visits** – Number of visits.
  - **Last seen** – Date and time of last visit.
  - **Favoured Connection** – Most used connection method.
  - **E-shots received** – Number of e-shots received.
2. Tags will automatically be added to profile cards using the data captured from the login methods. You can then filter the data by the system tags.
3. By default, only the Visitor data will be displayed within the overview.

Profile type: Visitor



4. To add additional filter tags, click the  icon.
5. The following window will open allowing you to select a Profile type tag from the drop-down menu. You can also select if for a device or visitor.

### Visitor tags

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Profile type ▼

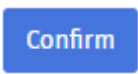
Device ▼




6. The available Profile type tags to select are as follows:


- **Device**
- **Gender**
  - Male
  - Female
  - Non-binary
  - Not disclosed
- **Age**
  - 13-100
- **Network**
  - Facebook
  - Google
  - Registration Form
  - Twitter
  - LinkedIn
  - Instagram
  - One Click

7. When a selection is made, the next drop down menu will change depending on the selection.

8. Click the  button once a selection has been made. The details will then update to display the filtered data.

9. To turn off a filter click the  within the tag you no longer want to use as a filter. The visitor list will update to show the updated data list.

10. You can also filter by custom venue tags, you would need to have created the tags against the relevant venue beforehand.

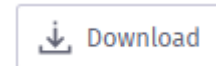
11. If venue tags had been created an additional button will appear  but only at Customer Level.

12. Clicking this button will display the custom tags created in the management area. If none have been created the drop down will advise to create.

13. Clicking the  button to apply the filters selected.

14. The data will then update to show the filtered data.

15. To clear the filtering applied, click the  button.



16. You are also able to export from the overview screen. Clicking the icon will either download all the data or filtered data if applied, to your PC in a CSV file format.

17. You can also change the date range by using the Date Picker



button, by default it will display just one day of data.

18. The following window will open:

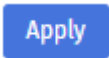
The image shows a date range selection interface. At the top, there is a header with a calendar icon and the text "01/01/2019 - 01/01/2019". Below this, the interface is divided into two main sections. The left section, titled "Date range", contains two identical calendar views for January 2019. Each calendar has a header with "January 2019" and a left arrow. The days of the week are listed as Mo, Tu, We, Th, Fr, Sa, Su. The numbers 1 through 31 are arranged in a grid. The number 1 is highlighted in blue in both calendars. Below the calendars are "Reset" and "Apply" buttons. The right section, titled "From current date", contains five radio button options: "Last 7 days", "Last 14 days", "Last 30 days", "Last 60 days", and "Last 90 days".

19. Select the **From** and **To** dates

20. Alternatively click one of the date options on the right of the screen, these are:

- Last 7 days
- Last 14 days
- Last 30 days
- Last 60 days
- Last 90 days

21. Select the required date range from the options.

22. Click the  icon when you have made your final selection.

23. The screen will update with the new data for the selected date range.


## Profile cards

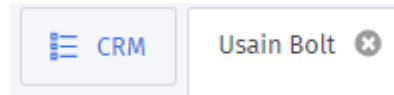
1. To access a user or device profile card click the relevant option from the overview list,

e.g.  button on the right or click on the image of the user on the left.

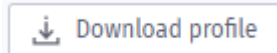
2. The profile card will open and the details will be displayed, the data that is shown is dependent on the authentication method used to log into the network and the devices used.



3. The profile card will be displayed as an additional tab at the top of the screen next to Overview, you can click between the profiles and the CRM overview screen. To close a profile, click the  icon next to each profile.

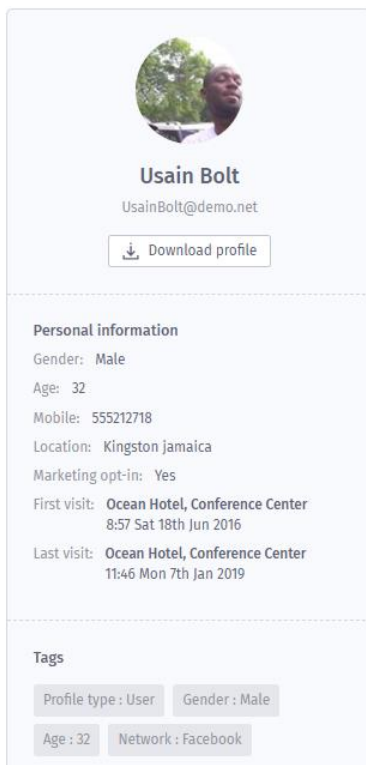


4. The profile card will display information on the left with the option to also



as either CSV or PDF.

5. It will also show any system tags that have been applied to this contact, these tags can be used in order to filter your data.



The profile card for Usain Bolt includes a circular profile picture, the name 'Usain Bolt', and the email 'UsainBolt@demo.net'. Below this is a 'Download profile' button. The card is divided into sections: 'Personal information' with fields for Gender (Male), Age (32), Mobile (555212718), Location (Kingston jamaica), Marketing opt-in (Yes), First visit (Ocean Hotel, Conference Center, 8:57 Sat 18th Jun 2016), and Last visit (Ocean Hotel, Conference Center, 11:46 Mon 7th Jan 2019). The 'Tags' section contains four tags: 'Profile type : User', 'Gender : Male', 'Age : 32', and 'Network : Facebook'.

6. There will also be a number of tabs along the top of the profile card, these are:
  - **Overview** – This will display a quick view of all the details along with any Visitor notes.
  - **Venues** - A lists of venues visited by the user / device with information of the number of times the venue has been visited, the date of the last visit and the time spent at the venue.
  - **Connection** – This area lists the various ways this user or device has connected to the WiFi service. It shows the connection type (Facebook, Google, registration form etc.), and the number of times that connection type has been used.

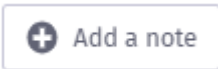


- **Devices** - Lists all the devices associated with this user, showing the device type, the MAC address associated to the device, the OS installed on the device and the number of times we have seen the user using the device. You can launch the profile card for any devices listed by clicking on the MAC address link for that particular device.
- **Marketing** – Displays any marketing received.
- **Social** – Will display the social likes this user has clicked within Facebook.
- **Sessions** – The number of authenticated logins along with the data usage, platform used and MAC address.
- **Paid Sessions** – If Tiered bandwidth is turned on this will show any paid sessions for this user.

## Overview

The screenshot shows a dashboard with the following elements:

- Navigation tabs: Overview (selected), Venues, Connections, Devices, Marketing, Social, Sessions, Paid sessions.
- Metrics cards:
  - Venues visited: 1
  - Associated devices: 2
  - Marketing messages received: 0
  - Total sessions: 16
- Last visit information: Ocean Hotel, Conference Center (07 Jan 2019)
- Visitor notes section with an "Add a note" button.
- An existing note titled "VIP" with the text "Created October 8, 2018 by Demo User" and "Invitar a la prensa proxima vez". A "Delete" button is visible next to the note.

1. The overview will show the following information:
  - Number of venues visited
  - Last venue visited
  - Number of associated devices
  - Number of marketing messages received
  - Total number of sessions
  - Visitor notes
2. You have the ability to add new notes or delete existing.
3. To add a new note, click the  button.
4. The area will expand, you can now give the note a Title and a message.



5. Clicking the **Save** button when complete.
6. The new note will then be displayed at the top of the list.
7. To delete a note, click the **Delete** button.
8. A message box will appear asking for confirmation to delete the note.

Delete note?

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Are you sure you want to delete this note?

No Yes

9. Click the **Yes** button to confirm.
10. The note will not be deleted.

## Venues

Overview **Venues** Connections Devices Marketing Social Sessions Paid sessions

Venues visited  
1 venue totalling 627 sessions

**Ocean Hotel, Conference Center** [View sessions](#)

Fort George Street Port Antonio Port Antonio US  
Visits: 627  
Last visit: 7th Jan 2019

1. The venues tab will show all the venues visited.
- 2.
3. It will show the following:
  - Venue name
  - Venue address
  - Number of visits
  - Last visit

## Connections

Overview Venues **Connections** Devices Marketing Social Sessions Paid sessions

Connection methods  
1 venue totalling 627 sessions

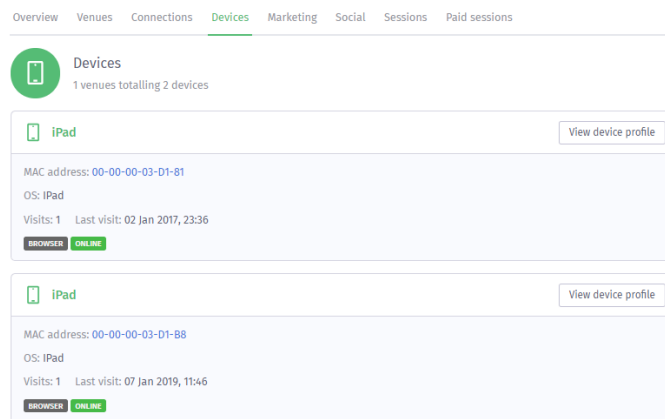
**Facebook** 627 connections over recent days

- Mon 7th Jan 2019 - Ocean Hotel, Conference Center (1 session)
- Sun 6th Jan 2019 - Ocean Hotel, Conference Center (1 session)
- Sat 5th Jan 2019 - Ocean Hotel, Conference Center (1 session)
- Fri 4th Jan 2019 - Ocean Hotel, Conference Center (1 session)
- Thu 3rd Jan 2019 - Ocean Hotel, Conference Center (1 session)
- Wed 2nd Jan 2019 - Ocean Hotel, Conference Center (1 session)
- Tue 1st Jan 2019 - Ocean Hotel, Conference Center (1 session)
- Mon 31st Dec 2018 - Ocean Hotel, Conference Center (1 session)



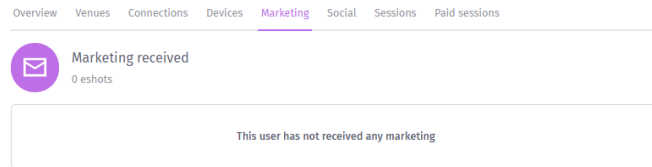
1. The connections tab displays the number of connection methods used when logging into the venue(s).
2. If more than one login method was used each would have its own box containing the connections.
3. It will display the following information:
  - Date of connection
  - Venue name
  - Number of sessions
  - at which venue

## Devices



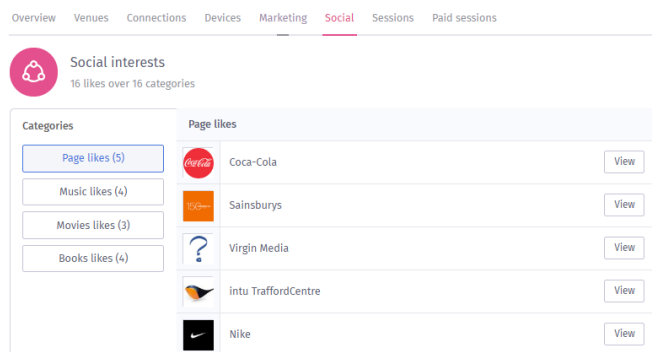
1. The devices tab will display the number of venues visited and the total number of devices used.
2. Each device will be broken down and display the following information:
  - Name
  - MAC Address (last 4 digits only)
  - OS
  - Visits
  - Last visit
3. You can also open a device profile card for each device for further breakdown, by clicking the **View device profile** button.
4. An addition tab will appear at the top of the screen for this specific hardware.

## Marketing



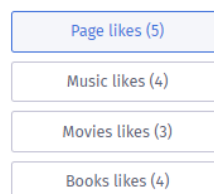
1. If any marketing communications have been sent to this user they would be displayed in this area.
2. It would show each communication that was sent and a snippet of the content.
3. If no communications have been received the area would appear blank

## Social

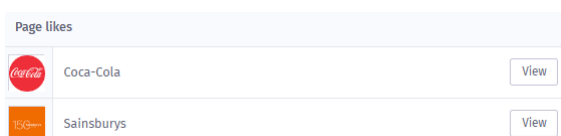


1. If the user logged in with Facebook, we can see their likes and the different categories of likes
2. On the left it will display the Categories and the number of Likes in each category

### Categories



3. On the right of the screen it will break down the likes and show each one.




4. You can also view the Liked Page on Facebook by clicking the  button.





5. This will then open an additional tab and take you to the Facebook page.

### **Exporting specific profile data**

1. You can also export the data captured from within a profile card as well as the overview by clicking the  icon.  
The icon is a small orange square with a white downward-pointing arrow and a white right-pointing chevron.
2. Where the CAM overview exports all the data filtered, the export from within a profile will give specific data about that one profile.
3. It will give the option to select either:
  - PDF
  - CSV