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SAS® Customer Intelligence 360 for Dummies

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ABSTRACT

Have you heard of SAS® Customer Intelligence 360, the program for creating a digital marketing SaaS offering on a multi-tenant SAS cloud? Were you mesmerized by it but found it overwhelming? Did you tell yourself, “I wish someone would show me how to do this”? This paper is for you. This paper provides you with an easy, step-by-step procedure on how to create a successful digital web, mobile, and email marketing campaign. In addition to these basics, the paper points to resources that allow you to get deeper into the application and customize each object to satisfy your marketing needs.

INTRODUCTION

SAS® Customer Intelligence 360 is a data-driven and analytically powered application that gives marketers all the tools they need to manage complex digital customer journeys. It enables marketers to discover, create, orchestrate, optimize, and measure the success of these customer journeys. However, you do not have to be a marketing genius or a technically savvy user to use the application. The user interface is very intuitive, efficient, and consistent, with extensive built-in error-prevention and management capabilities. In addition to a comprehensive user’s guide, SAS Customer Intelligence 360 provides help pop-ups throughout the application for the more complicated features.

Currently, SAS Customer Intelligence 360 supports web, mobile (including in-app messaging and push notifications), and email personalization features. The focus of this paper is on the web and email channels. After you learn how to interact with the application using these channels, you can apply what you have learned to mobile channels and other various social media channels that will be supported in future releases. Instructions on how to create basic mobile items are included in Appendix 3.

Most digital consumers are not familiar with marketing terms and concepts, but as they browse their favorite sites on the Internet, sign up to receive promotional material, and order merchandise, they start to notice that things happen based on their browsing and ordering behavior. Pop-up ads show up for items that they looked at earlier, or they receive emails with offers for items left in their shopping carts. They like the personalized attention they receive and perhaps they get inspired to spend more or request more information. SAS Customer Intelligence 360, with its powerful SAS® Analytics, is designed to make that customer experience even better. It is the tool to help you enhance the customer experience and capitalize on that experience to make more profits for your organization.

BUILDING YOUR FIRST MARKETING CAMPAIGN ONE BABY STEP AT A TIME

Using SAS Customer Intelligence 360, we demonstrate how easy it is to use the product and how you can start with small goals and expand them as you become more familiar with the product and its features. With the comprehensive building blocks, you can create the simple items needed for a basic digital marketing campaign. When you understand how the basics work, you can use the visual tools to combine them into a simple customer journey or, as we call it, an activity map. Of course, activity maps can get quite complex, but that is a topic for another paper!

Here is what you learn to do:

- display some default content in a specified location on a web page via a web spot
- replace the default content delivered via the web spot with a creative that is defined in a message in a web task
- modify the web task to use event targeting to display a different creative based on a visitor’s browsing behavior
- create an activity map that starts with the web task that uses event targeting and ends with an email task that sends an email to the visitor based on the visitor’s browsing behavior

Figure 1 depicts our simple customer journey in an activity map within SAS Customer Intelligence 360. We start the activity with the web task using event targeting that delivers content based on a visitor's browsing behavior. We then use a split to invoke the email task to send an email to the visitor if the browsing conditions are met.

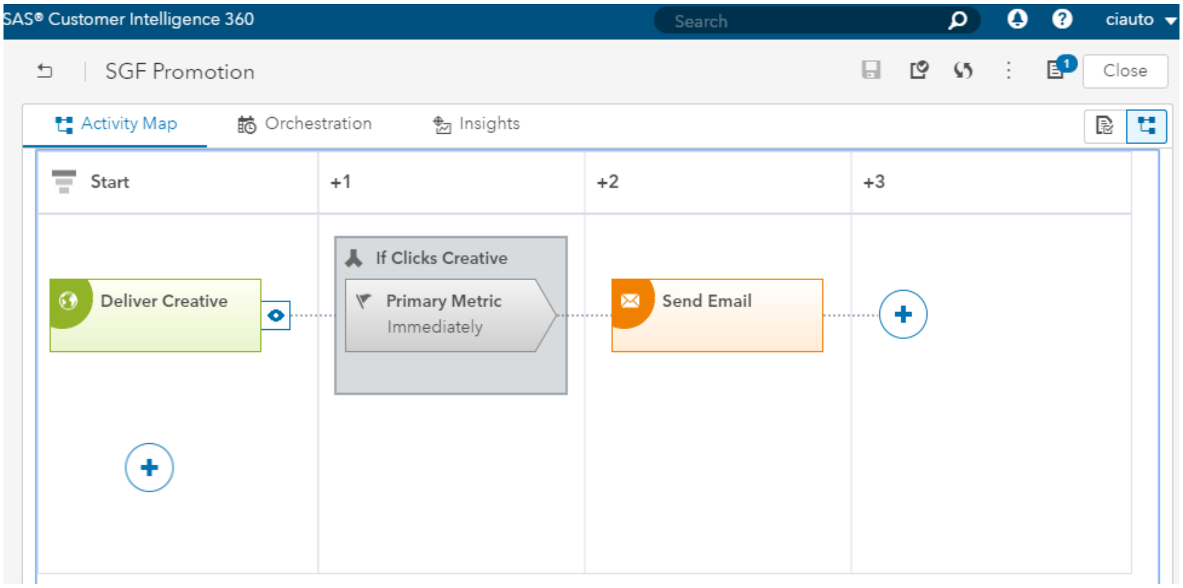

Figure 1. Activity Map

USING BUILDING BLOCKS TO CREATE SIMPLE DIGITAL MARKETING ITEMS

Before you dive into the application to create the items needed to deliver content via different digital media, it helps to have a basic understanding of these items:

- how your website is customized to enable SAS Customer Intelligence 360 to monitor your site for events and to collect visitors' behavioral data
- how SAS Customer Intelligence 360 is configured to complete these actions:
  - receive data from the website
  - deliver emails
  - determine a visitor's identity, including the visitor's email address

Using the instructions provided, your organization's website administrator (or webmaster) edits your website's source code and inserts a small piece of JavaScript into your website's HTML code. This process, which is called tagging the website pages, enables the pages on your site to collect a visitor's web behavior such as page views, clicks on images, and form submissions. After the web pages are tagged, your system administrator approves your website domain in the administrative section of the product. While the collected data enables the application to help you with web personalization and enhanced digital marketing, the approval of the domain provides the application with access to the tagged web pages when creating items such as spots or events.

Your system administrator also defines the connection to the outbound email server used by your organization for delivery of emails and creates a user identification definition to uniquely identify website visitors. This definition tells the application what is used to uniquely identify a website visitor and where in the website the identification event is triggered. Email address, logon ID, and assigned customer ID are all supported and merged in the system to create unique customer profiles. In this paper, we use a Form Submit identification event on the My Account page of our website where visitors log on using their registered email addresses.

Let's begin.

DISPLAY A DEFAULT IMAGE IN A GIVEN LOCATION ON A WEB PAGE USING A WEB SPOT

The most basic feature of the application enables you to deliver content to a place on a web page we call a *spot*. The application enables you to use content such as images, text, videos, or a combination of these. The content can come directly from outside sources, or you can upload the content to our centralized web-based digital asset management repository called Assets. Having the content in Assets enables you to use, reuse, and version the rich media content and helps you determine where the content is most effective.

The content that is delivered to the website is not the uploaded asset but what we call a *creative*. A creative represents the content that can be delivered to a web page, via email, or to a mobile device. A creative in its simplest form is an instance of the asset, but it can be much more than that. For example, an asset can be just a picture, whereas a creative is the picture with added text.

In this section, we create a new folder in Assets to store all the content that we will upload for use throughout the paper. Then we upload a single file into the folder. The uploaded content is used in the creation of a creative. Next, we create and publish a spot that uses the creative as its default content.

Create a folder for easier management of uploaded content:

1. From the side menu, click **Assets**.
2. Click .
   a. Enter a name and description.
   b. Click **OK** to add the folder to the Assets list.

Upload a single file to the new folder:

1. Click that is associated with the new folder to access it.
2. Click **Upload Asset**.
   a. Enter a name for the asset.
   b. Click **Browse**.
      i. Navigate to the file of interest, highlight it, and click **Open**.
   c. Click .
      i. The application indicates that the upload is complete. A thumbnail and preview of the asset are successfully generated.
3. Close the dialog box to see your first asset in the folder.

Uploading assets one at a time is a time-consuming process and that is exactly why the application provides the feature that allows batch upload of multiple assets. The instructions to upload multiple assets are included in Appendix 1. Those instructions were used to upload the rest of the assets that are used throughout the paper.

Create a creative using the uploaded asset:

1. From the side menu, click **Creatives**.
2. Click .
3. Click **HTML Editor**.
   a. Click .
      i. Select the uploaded asset.
      ii. Click **Done**.
   b. Click **Done**.
4. Click .
   a. Enter a name for the creative.

   b. Click **Save**.
5. Click the **Orchestration** tab.
   a. Click **Mark Ready**.
6. Click **Close**.

Create and publish a web spot that uses the creative for its default content:

1. From the side menu, click **Spots**.
2. Click .
3. Click **Web Spot**.
   a. Because the website domain is tagged and approved by the system administrator, the website appears in the application. By default, the application is set so that you can navigate to the web page where you want your content to be delivered.
   b. Change the setting from Navigate to Select.
   c. Click the desired location to highlight it.
   d. Click **Create Spot**.
4. Click the **Default Content** tab.
   a. Slide to the right to turn on the feature.
   b. Click .
   c. In the Select Content dialog box, complete these steps:
      i. From the drop-down list, select **Creatives**.
      ii. Select the creative that you created.
      iii. Click **OK**.
5. Click .
   a. Enter the name of the spot.
   b. Click **Save**.
6. Click the **Orchestration** tab.
   a. From the drop-down list, select **Mark Ready and Publish**.
      i. The following message is displayed:
         "You are about to publish this item. Published items have a status of Active and cannot be returned to a Designing or Ready status. A notification is sent when publishing is complete. Do you want to continue?"
      ii. Click **Yes**.
7. Click **Close**.

The web spot is now created and publishing, which means it is in the process of sending the creative to the location on the web page. When publishing is complete, a notification is sent to the user interface and the status of the spot changes to Active. We can now visit the website to see the creative delivered to the location on the selected web page.

Next, we learn how to deliver a specific creative via a web task to replace the default content delivered by the web spot.

REPLACE THE DEFAULT CONTENT WITH A CREATIVE DEFINED IN A MESSAGE

Messages provide a way to group creatives. In a message, you might add all of the creatives that are associated with a campaign or offer, even though the creatives are designed for different channels. You can create the creatives first and then include them in a message, or as you create your message you can create your creatives from within the message. For this section, we create a message that contains two creatives using the previously uploaded assets.

1. From the side menu, click **Messages**.
2. Click .
3. Click **New Creative**.

4. Click **HTML Editor**.
    a. Click .
    b. Select one of the uploaded creatives.
    c. Click **Done**.
    d. Click **Save**.
        i. Enter the name of the creative.
        ii. Click **OK**.
5. Click .
    a. Add the second creative to the message.
6. Click .
    a. Enter the name of the message.
    b. Click **Save**.
7. While still in the message, click in the upper right corner of each creative and select **Mark Ready**.
8. Click **Close**.

Note that marking the message ready is a requirement if we want to publish an item such as a web task that uses the message. We are now ready to build a web task to replace the default creative that was delivered to the web page via the web spot.

1. From the side menu, click **Tasks**.
2. Click .
3. Click **Web**.
    a. Select the web spot that you created earlier.
    b. Click **Create Task**.
    c. Click .
        i. Select the message that you created earlier.
        ii. Click **OK**.
            1. By default, the first creative in the message is the one selected for the task.
4. Click .
    a. Enter the name of the task.
    b. Click **Save**.
5. Click the **Orchestration** tab.
    a. Select **Usage**.
        i. Note that the creative and web spot are listed as being used in the task. As mentioned earlier, these items must have a status of Ready or Published before the task can be published.
    b. From the drop-down list, select **Mark Ready and Publish**.
        i. The following message is displayed:
            "You are about to publish this task. This task uses items that are not published. Publishing the task will also publish dependent items that are not currently published. A notification is sent when publishing is complete. Do you want to continue?"
        ii. Click **Yes**.
6. Click **Close**.

When the status of the web task is Active, return to the website and refresh the web page to see the new creative delivered to the location where the default creative was previously displayed.

Next, we learn how to use the visitor's interaction with the website as a targeting criterion in the existing web task. The web task continues to deliver the web spot's default content to the location on the web page unless the visitor visits a specific page first.

DISPLAY A CREATIVE BASED ON A VISITOR’S BROWSING BEHAVIOR

The visitor’s interaction with the website is what we call an *event*. There are many types of events, but we use a *page view event*, which is an event captured when a visitor views a page on the website. We use this event to trigger the modified version of the previous web task to deliver a different creative to the same location on the web page.

Let’s create the event first.

1. From the side menu, click **Events**.
2. Click .
3. Click **Page View**.
    a. Because the website domain is tagged and approved by the system administrator, the website appears in the application. By default, the application is set to allow navigation to the web page where you want to capture the page view event.
4. Click **Create Event**.
5. Click .
    a. Enter the name of the event.
    b. Click **Save**.
6. Click the **Orchestration** tab.
    a. From the drop-down list, select **Mark Ready**.
7. Click **Close**.

Now, create and mark ready a new creative using a different uploaded asset.

Finally, let’s modify the existing web task to use a different creative and set it up for page view event targeting.

1. From the side menu, click **Tasks**.
2. Click the web task that you created to open it.
3. Click the **Content** tab.
    a. Click .
        i. Select the second creative in the message and deselect the first one.
4. Click the **Targeting** tab.
    a. Click .
    b. Click .
        i. Select the page view event that you created.
        ii. Click **OK**.
5. Click .
    a. Note that this action makes the task out of sync with what is already published to the website.
6. To synchronize the task, click the **Orchestration** tab.
    a. Click **Republish**.
        i. The following message is displayed:
            “You are about to republish this task. The currently published version of the task will be updated. A notification is sent when publishing is complete. Do you want to continue?”
        ii. Click **Yes**.
7. Click **Close**.

When the web task is Active again, refresh the web page to see that the location is populated with the web spot’s default content. In order for the visitor to see the creative in the message in the web task, the visitor has to visit the page that triggers the page view event.

We visit the page that was set up to trigger the page view event and then we visit the page where the web task has published its new creative. And indeed the new creative is displayed in the location.

Next, we learn how to coordinate a couple of tasks to meet the goals of our marketing campaign. We create an activity that maps the customer paths between two tasks—a web task using event targeting, followed by an email task that is triggered by a split.

CREATE AN ACTIVITY MAP THAT SENDS AN EMAIL TO THE VISITOR WHO CLICKS THE CREATIVE DELIVERED BY THE WEB TASK

Before proceeding with the creation of the items needed for the activity map and the activity map itself, let’s review our desired customer journey.

- If a visitor visits a certain page on our website, a customized creative is delivered to a location on a different page that was initially populated with the default content. If the visitor clicks the customized creative, and we have the visitor’s email address, then we can send an email to the visitor.

Create and mark ready a new creative using a different uploaded creative. This creative is used in the email content block in the email task that we are ready to create.

1. From the side menu, click **Tasks**.
2. Click .
3. Click **Email**.
4. Click **Design your own layout**.
   a. Click **Edit**.
   b. From the Layout Gallery:
      i. Drag Text to the area above the default content.
         1. Enter your desired text.
      ii. Drag Image to the area below the entered text.
         1. Click .
            a. Enter the URL for your desired image.
            b. Click **Done**.
      iii. Drag Content Block to the area below the image.
   c. Click **Done**.
   d. Click .
      i. From the drop-down list, select **Creatives**.
      ii. Select the creative that you created earlier, and then click **OK**.
5. Click the **Header** tab.
   a. Enter the following information:
      i. Subject
      ii. From: Select a sender address.
      iii. Reply-to: Select the predefined address or specify any valid email address.
6. Click the **Orchestration** tab.
   a. Click **Mark Ready**.
      i. The following message is displayed:
         “The item must be saved before its status can be changed. Do you want to save now?”
      ii. Click **Yes**.
         1. Enter the name of the task.
         2. Click **Save**.
7. Click **Close**.

Because the application does not allow an active task in an activity map, we either have to create a new web task or make a copy of the existing task. To save time, we use the Save As feature to make a copy and then make the necessary modifications before we publish the task. But is it okay to have two published web tasks that use the same spot? Which content will be delivered to the location on the web page—the content associated with the original task or the new task? These questions are valid, but without using more advanced features we cannot guarantee which task takes precedence.

To ensure there is no conflict and that the content associated with the new task is delivered to the location on the web page, we need to End the original web task. This action changes the status of the web task from Active to Completed and results in the web task no longer delivering its content. However, ending the web task does not affect the status of the web spot used in it. This mean that the web spot continues to be active and continues to deliver its default content to the location on the web page.

We are now ready to end the web task, make a copy of it, and modify the copy to use a different creative.

1. From the side menu, click **Tasks**.
2. Click the web task that you created to open it.
3. Click the **Orchestration** tab.
    a. Click **End**.
        i. The following message is displayed:
            "Ending this item stops any associated data collection and makes its content unavailable. In addition, any unsaved changes will be lost. Do you want to continue?"
        ii. Click **Yes**.
4. Click .
    a. Select **Save as**.
        i. Enter a new name for the task.
        ii. Click **Save**.
5. Click the **Content** tab.
    a. Click .
    b. Click **Change Content**.
    c. Select the desired creative, and then click **OK**.
6. Click .
7. Click the **Orchestration** tab.
    a. Click **Mark Ready**.
8. Click **Close**.

Now that we have created and marked ready all the items needed for the activity, we can convert our customer journey into an activity map.

1. From the side menu, click **Activities**.
2. Click .
3. Click .
    a. Select **Task**.
        i. Click the web task created by the Save As feature, and then click **OK**.
4. Click .
    a. Select **Split**.
        i. Enter a name for the split.
        ii. Select **Primary metric** ("Click Through").
        iii. Click **OK**.
5. Click .
    a. Select **Task**.

        i. Click the email task that you created, and then click **OK**.
6. Click .
    a. Enter a name for the activity.
    b. Click **Save**.
7. Click the **Orchestration** tab.
    a. From the drop-down list, select **Mark Ready and Publish**.
        i. The following message is displayed:

            "You are about to publish this activity. Publishing will make the activity and all of its associated tasks and creatives active. This operation might take a long time and will run in the background. A notification is sent when publishing is complete. Do you want to continue?"

        ii. Click **Yes**.
8. Click **Close**.

When the activity is Active, refresh the web page to see the new creative in the location on the web page. The reason we see the new creative included in the web task and not the web spot's default content is because as a visitor we have already visited the page that triggered the page view event.

To trigger the email task, we need to click the displayed creative. However, if we click the creative without having logged on to the website, an email is not sent because the email address of the visitor is not known. Therefore, we navigate to the My Account page of the website and log on with our valid email address and password.

Now we are ready to revisit the web page that displays the new creative included in the web task. We click the displayed creative to trigger the Click Through metric selected in the split. This action results in the triggering of the email task. After the email task is triggered, we can log on to the email account and confirm the delivery of the email!

As you can see, it is quite easy to use SAS Customer Intelligence 360 to create the items needed for a successful digital marketing campaign. Although we have only scratched the surface, you are now equipped with the basic skills to dive into the application. As you gain more experience, you can use the comprehensive user's guide to help you learn the more complicated features of the application.

BEHIND-THE-SCENES POWER OF SAS® ANALYTICS

The power of SAS Analytics is embedded seamlessly in SAS Customer Intelligence 360. SAS Analytics helps you identify sets of potential customers by their click patterns and then market to them in a way that converts them into actual customers. SAS Analytics measures the results of the variations in creative content and manages the performance of tasks for you. After the items become Active, the following available Analytics Services run in the background to provide you with as much useful information as possible to continuously and in real time improve your digital campaign:

- **Single Experience**
    - Helps you determine the effectiveness of the creative (within the task).
- **Challenger**
    - Helps you compare the performance of multiple creatives used in an A/B Test Task to find the most effective creative (variant).
- **Multi-Armed Bandit**
    - Optimizing an A/B Test Task enables analytics to use a multi-armed bandit approach to finding the best-performing creative (variant). The optimized test task shifts traffic to more effective creatives (variants) before the end of a test.
- **Segment Discovery**
    - Discovers segments for you after the sample size is met. Discovered segments represent a subset of a task's target audience that responds more favorably to a specified variant than the overall population. The members of a discovered segment include only customers who have interacted with the task content.
- **Segment Profiler**

        - Helps you better understand the differences or similarities between groups of people. Three types are supported:
            - **Discovered**: Segment profiles are automatically generated for segments and compare the members of the segment with everyone else.
            - **Enterprise**: Defined by the user as segments of interest, the profile compares everyone in the segment to everyone not in the segment.
            - **Segment vs. Segment**: Compares members of any two different segments selected by you.
    - **Recommender**
        - Helps you personalize your products based on customer viewing and interaction habits.
    - **Confidence Lift** (for Recommender)
        - Helps you determine the effectiveness of the Recommender Service.

MONITORING PERFORMANCE

SAS Customer Intelligence 360 provides in-depth information to users so that they can determine the success of their digital campaigns via the Reporting feature. Each Active spot, email event, task, and activity provides an Insights tab that displays useful information in the form of graphics and tabulated data to help users monitor the performance of the item of interest.

- **Monitoring a spot**
    - Helps you determine how effective the spot is. For example, you can find information about how much traffic your spot is getting. Using this information, you can determine whether the spot is in a good location for the creative that your task is displaying.
    - The Summary section contains details about the volume of people that have seen the spot. You can view metrics for unique visitors or for viewable impressions.
- **Monitoring an email event**
    - Helps you measure the effectiveness of your email task. You can learn whether your emails were delivered and which recipients opened, clicked, or viewed a link in the email.
- **Monitoring a task**
    - Helps you monitor the success of your task. You can see the status of your task, how long the task has been active, the date on which it started, and the last time it was updated.
    - The Summary section contains information about visitors, conversions, and conversion rates.
- **Monitoring an activity**
    - Helps you monitor the success of your activity after it has been published.
    - The Performance section contains information about visitors, conversions, and conversion rates.

GLOSSARY

- **Activity** is a coordinated series of tasks that are designed to meet the goals of a marketing campaign. An activity map charts the customer paths between tasks, such as sending a particular message through a particular channel, and conditions such as primary metrics and evaluation periods. For example, you might use a Web task to present a Hotel Offer link on your website. Then, you could use an Email task to send a discount offer to all visitors who click the link within a week.

- **Assets** is a centralized, web-based repository that manages and controls digital marketing assets such as images, documents, audio files, and video files.

- **Creative** represents the content that you want to deliver to a web page.

- **Domain** identifies particular web pages within the website of interest where the traffic data is collected for customers visiting the site.

- **Email Send Agent** represents a connection to an outbound mail server for the delivery of emails.
- **Email Task** contains all the information and items that you need to deliver general or personalized content to a target audience through an email channel. An email task collects data about how recipients interact with the content. This data enables you to monitor how the content is performing.
- **Identity** is a piece of information that identifies a customer.
- **Identity Event** is an event that generates data that can then be used to create or modify a customer's identity profile. An example is a customer who enters their email address in a field on a web page.
- **Message** groups creatives together so that the creatives can be delivered by a task.
- **Metrics** measures events that the system can detect and helps determine the success of the content being delivered by the activity.
- **Primary Metrics** measures conversions to determine the overall success of the activity.
- **Web Event** enables you to define the customer behavior or action that you want to capture. Events can be used to trigger a task or define a target audience. Examples of events include form submissions, web page loads, viewing or clicking an item on a web page, and adding an item to a shopping cart.
- **Web Spot** is the place on a web page where the content that a task delivers is displayed.
- **Web Task** delivers targeted content to website visitors and collects information that you can use to monitor how the task is performing. For example, you can set up a web task to display a specific creative to adults between the ages of 25 and 45 when they visit your website's home page.

CONCLUSION

SAS Customer Intelligence 360 provides an intuitive user interface for building your digital marketing objects to deliver customized offers across multiple channels, devices, and media. As your customers browse your website, interact with your mobile application, or respond to your emails, data is collected and added to the data that you already have from powerful SAS Analytics to create a personalized view of each customer, which then enables you to derive actionable insight from their behavior.

REFERENCES

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RECOMMENDED READING

- [www.sas.com>Products & Solutions>SAS Customer Intelligence 360>Learn](www.sas.com)
    - *Free Tutorials*
    - *Get Started*
    - *Advanced Techniques*

CONTACT INFORMATION

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APPENDIX 1—UPLOADING MULTIPLE ASSETS (BATCH JOB)

To save time, instead of uploading one asset at a time, the application makes it quite easy to upload multiple assets via a single batch job.

1. From the side menu, click **Assets**.
2. Open the folder of interest.
3. Click .
4. Click **Browse**.
    a. Navigate to the location of files that contain content for use in the creatives.
    b. Highlight all the files of interest, and then click **Open**.
    c. Select all listed content, and then click **Upload**.
        i. A message is displayed similar to this:
            “Job "Batch Upload2016-12-22T18:45:25:332Z" successfully submitted.”
        ii. Close the message.

Depending on the number of files and their size, the upload might take a few seconds. Refresh the page to see the successfully uploaded assets. In addition, look for the Notifications update to the user interface.

After the files are uploaded, you can perform different actions on each one. Click (Show actions) to display the available actions menu for each asset as shown in Figure 2.

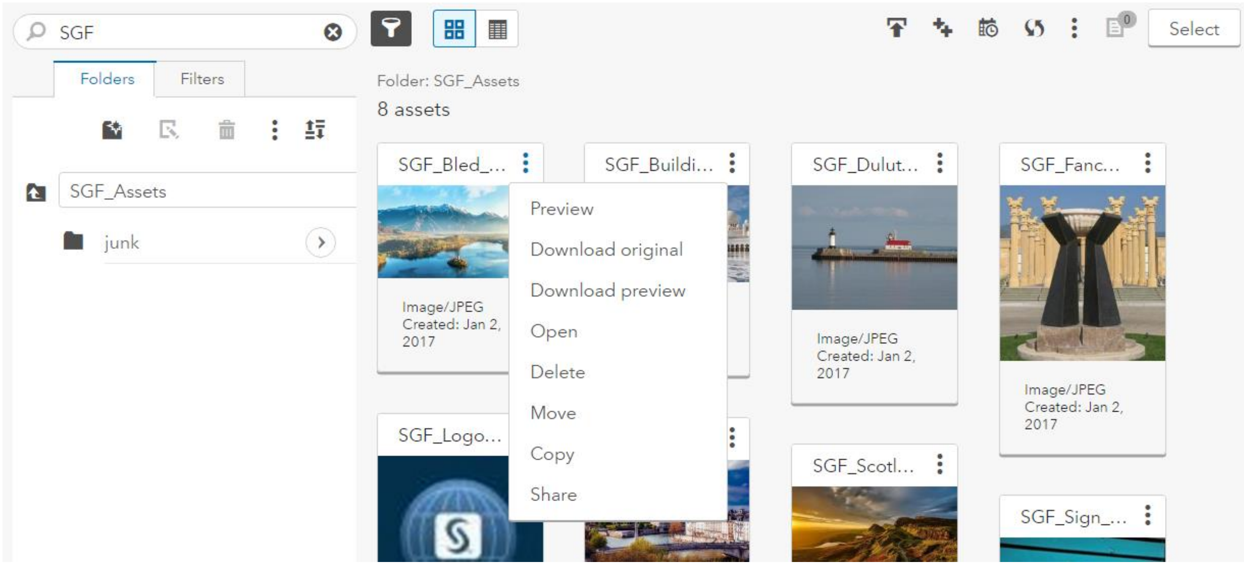

Figure 2. Assets

APPENDIX 2—ITEMS CREATED OR USED IN EACH SECTION

Here is a list of each item created in this paper and where the items are used.

DISPLAY A DEFAULT IMAGE IN A GIVEN LOCATION ON A WEB PAGE USING A WEB SPOT

- **Folder:** SGF_Assets
- **Asset:** SGF_Paris_Asset
- **Creative:** SGF_Paris_CreativeForSpot
- **Spot:** SGF_SpotWDefaultContent

REPLACE THE DEFAULT CONTENT WITH A CREATIVE DEFINED IN A MESSAGE

- **Asset:** SGF_Scotland_Asset
- **Asset:** SGF_Sign_Asset (Not selected for this task)
- **Message:** SGF_2Creatives_Message4WebTask
  - **Creative:** SGF_Scotland_Creative4WebTask
  - **Creative:** SGF_Sign_Creative4WebTask
- **Spot:** SGF_SpotWDefaultContent
- **Web Task:** SGF_WebTask

DISPLAY A CREATIVE BASED ON A VISITOR'S BROWSING BEHAVIOR

- **Asset:** SGF_Sign_Asset
- **Message:** SGF_2Creatives_Message4WebTask
- **Spot:** SGF_SpotWDefaultContent
- **Event:** SGF_PageViewEvent
- **Web Task:** SGF_WebTask

CREATE AN ACTIVITY MAP THAT SENDS AN EMAIL TO THE VISITOR WHO CLICKS THE CREATIVE DELIVERED BY THE WEB TASK

- **Asset:** SGF_Fancy_Asset

- **Asset:** SGF_Dulute_Asset
- **Creative:** SGF_Fancy_Creative4EmailTaskInActivity
- **Creative:** SGF_Dulute_Creative4WebTaskInActivity
- **Spot:** SGF_SpotWDefaultContent
- **Event:** SGF_PageViewEvent
- **Email Task:** SGF_EmailTask4Activity
  - **Image URL**: https://.../creatives/SGF.jpg
- **Web Task:** SGF_WebTask4Activity
- **Activity:** SGF_WebEmailActivity

APPENDIX 3—MOBILE BUILDING BLOCKS

SAS Customer Intelligence 360 provides you with the ability to collect data across your mobile applications (apps) and manage your customer's digital interactions across different mobile channels.

With the built-in SAS Analytics and Reporting features, you can identify the mobile customers that you want to reach, create the locations where the content appears on different mobile devices, and define the actions that make up the customer interactions with your mobile content. You can also design the messages that contain your mobile content and create the mobile tasks and activities that deliver the mobile content to your customers.

To make all of this possible, SAS Customer Intelligence 360 provides a mobile software development kit (SDK) for both iOS and Android devices. The SDK contains a supporting library that enables your organization's developers to add support for event collection and content management to their native mobile apps.

Here are some benefits that the mobile SDK provides:

- minimizes overhead on both the development and usage of your native mobile app.
- gathers data whether the app is online or offline. Offline data is sent back to SAS Customer Intelligence 360 after the device has connectivity.
- has built-in abilities to track geofences and beacons if your organization needs to support these.
- enables app developers and marketers to create their own custom events and to support several built-in system events.

In this section you learn how to create basic mobile items and how they differ from the web items that we created earlier.

Before we create the mobile items, you need to have a basic understanding of how SAS Customer Intelligence 360 communicates with your organization's mobile app.

Your system administrator downloads and activates the mobile SDK for your iOS or Android mobile device. In the administrative section, the administrator creates a definition for your organization's mobile app by using a unique name and ID and adds the required credentials for Apple or Google notification to the definition to register the mobile app.

Now we can begin to build the items.

SERVING CONTENT IN A MOBILE APP

There are no differences in the creatives that are served via a web task to a web page and those that are served via a mobile task to a mobile app. After the creatives are created, they can be used in different messages in mobile tasks.

Just like the web channel, we first need to create a mobile spot. Unlike a web spot where you select a physical location on a web page, for a mobile spot you use a spot ID that is provided by your mobile app developer.

1. From the side menu, click **Spots**.

2. Click .
3. Click **Mobile Spot**.
    a. Select the mobile application.
    b. Click **Create Spot**.
4. On the Spot Detail tab, enter the spot ID provided by the mobile app developer.

Saving, adding default content, and marking the mobile spot ready or publishing it are the same actions you perform for the web spot.

Next, we create a mobile event. Just like the mobile spot, you need to get the event ID from the mobile app developer.

1. From the side menu, click **Events**.
2. Click .
3. Click **Mobile**.
    a. Select the mobile application.
    b. Click **Create Event**.
4. On the Event Details tab, enter the event ID provided by the mobile app developer.

Saving and marking the mobile event ready or publishing it are the same actions you perform for the web event.

Now we can create a mobile task. The only difference is that instead of selecting the Web option for the Task Type, we select the Mobile Spot option.