Release 19.06
This release of SAS Customer Intelligence 360 includes the following new features and enhancements.

Include Additional Data Items When Exporting Data in a Direct Marketing Task
In a direct marketing task, when you export data from an on-premises data source, you can include these additional data items:
- data about on-premises segment maps, such as the map name, map code, map description, and the custom properties associated with the map
- data about on-premises segments, such as custom properties
- data about activities, such as the name, code, and description
- data about messages, such as the name, code, description, and custom properties
(Available in SAS 360 Engage: Direct)

Add an Empty Message to a Direct Marketing Task
When creating a direct marketing task, you can now add a message that does not contain any creatives. (Messages can be published without creatives.) The name of the message, such as “20% off your next order”, can be included in your export file.
(Available in SAS 360 Engage: Direct)
Support for Federated Single Sign-On for User Login

SAS Customer Intelligence 360 now supports single sign-on (SSO), which enables users to log on to the application by using their corporate login credentials.

For administrators, SSO can improve efficiency and security by centralizing user access management.

- Most passwords can be controlled through the corporate identity provider. In situations that require separate credentials (for example, API-specific or tenant-specific users), the credentials are secured by a client secret (passcode) that is automatically generated.
- SSO keeps corporate passwords safe. The simplified process eliminates cases where users might use the same password across multiple systems.

Enabling federated SSO requires some configuration. For example, existing calls to the REST API must use the new user-authentication REST API. This action ensures that authentication is routed appropriately after federation is enabled.

For more information, see Request Federated Single Sign-On for SAS Customer Intelligence 360. (Available in SAS 360 Engage: Digital, SAS 360 Engage: Direct, SAS 360 Engage: Email, SAS 360 Discover, and SAS 360 Plan)

Configure and Organize Custom Properties

You can use custom properties to collect or share information that is not covered by existing standard properties. Planning items can now take advantage of the following features:

- Custom properties can be assigned to attribute groups based on shared qualities.
- Custom properties can be assigned to categories based on how they are used.

In addition, in General Settings ⇒ Plan there is a new Custom Properties page that enables you to configure how custom properties are used in your marketing hierarchy. Each planning level, planning task, or planning activity can be associated with categories and attribute groups. Users can then select a category from a planning item’s Details page. The custom properties section displays only the attribute groups (and custom properties) that are related to that category and enabled in that marketing hierarchy.

(Available in SAS 360 Plan)

New E-commerce Metrics for Web and Mobile Spot A/B Test Tasks

In this release, SAS Customer Intelligence 360 enhances task and testing reporting. The new metrics enable e-commerce practitioners to monitor and evaluate their business.

The Insights ⇒ Summary and Insights ⇒ Performance tabs contain new user-based e-commerce metrics that track the performance of your web A/B test tasks and mobile spot A/B test tasks. On the
Summary tab, you can select which metric analysis displays in the graph. On the Performance tab, the analysis for the new e-commerce metrics is available by default.

These new results enable you to better understand how the actions of users in your test affect the other areas of your business. This information can deliver a clearer picture of the impact of your A/B tests.

The following metrics were added for web A/B test tasks and mobile spot A/B test tasks:

- Average time on site
- New user conversion

The following web metrics were added:

- Average add to cart
- Average order number
- Average order value
- Average page view
- Bounce rate
- Revenue per user

New reports on the Insights ⇒ Reports tab enable you to understand how your web A/B test tasks and mobile spot A/B test tasks are performing by session metrics and by revenue metrics.

Performance by Session Report

- The Overview tab analyzes key metrics in your A/B test tasks. The tab shows the leading variant and the confidence values for the leading variant compared to the lowest-performing variant in the test.
- The Metric Results tab analyzes each variant’s performance by comparing the confidence values and the lift values for each variant compared to the lowest-performing variant in the test.

Revenue Results Report (Available for web A/B tests only)

- The Overview tab shows the performance of key metrics by revenue. The tab also displays a graph that shows the amount of revenue that is generated over time.
- The Revenue Ranks tab highlights the best-performing and lowest-performing categories by revenue. This tab displays results for the highest revenue received and highest revenue abandoned for the variant, date, user type, browser, and device.
- The Revenue Received/Abandoned tab displays the trend of received and abandoned revenue across variants.
- The Revenue Cycle tab provides the sequence of steps a shopper takes to convert to a sale, along with the revenue that is generated from that sale.
- The Revenue Amounts tab identifies the variant, user type, device, and browser that generate the most revenue.
- The Revenue Over Time tab identifies the revenue received over time for the variant, user type, device, and browser.
- The Browsers tab provides the revenue performance and trend by browser over time.
- The Devices tab provides the revenue performance and trend by device over time.

Session Results Report

- The Overview tab shows the performance of key metrics by session. The tab also displays a graph that shows the number of sessions over time.
The **Session Ranks** tab highlights the best-performing and lowest-performing categories by session. This tab displays the variant, date, browser, and device with the most sessions and with the fewest sessions.

The **Revenue Received/Abandoned** tab displays the average amount of revenue that is received or abandoned per session. (This tab is available for web A/B test tasks only.)

The **Session Counts** tab identifies the variant, user type, device, and browser that generate the most sessions.

The **Sessions Over Time** tab identifies the session patterns over time by variant, user type, device, and browser.

The **Browsers** tab provides the session performance and trend by browser over time.

The **Devices** tab provides the session performance and trend by device over time.

(Applicable in SAS 360 Engage: Digital. A license for SAS 360 Discover is required to see these results.)

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**Approve URL Links within Workflow Tasks**

As an administrator, you can now configure workflows in the following ways:

- You can enable contributors of workflow tasks to add URLs to access the files.
- You can enable approvers to approve or reject the URL links.

For example, to complete an approval task, a user might need to access and approve files that are stored in an internal or external system.

This feature gives you more flexibility in the approval process within workflows.

(Available in SAS 360 Plan)

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**Archive**

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**Release 19.05**

This release of SAS Customer Intelligence 360 includes the following new features and enhancements.

**Define Custom Properties for Segments and Segment Maps**

Administrators can now define custom properties for segments and segment maps in the same way that they are defined for tasks, creatives, and messages. Defining custom properties for segments and segment maps enables you to customize SAS Customer Intelligence 360 to capture the specific business information needed for other items.

**Note:** Segments and segment maps support the same set of custom properties as tasks, creatives, and messages.

(Available for SAS 360 Engage: Direct and SAS 360 Engage: Digital)
Include Additional Data Items When Exporting Data in a Direct Marketing Task

In a direct marketing task, when you export data from an on-premises data source, you can include additional data items such as response tracking code, task name, task code, task description, segment name, segment code, and segment description.

(Available for SAS 360 Engage: Direct)

Specify Code Settings

The Tags and Codes section in General Settings contains a new page called Engage Code Format. Use this page to define how codes are generated for the different items (such as activities, segments, segment maps, tasks, messages, and creatives). You can set the code generation to be Manual, Automatic-Editable, and Automatic-Not Editable. Default prefixes are available for each item. You can also specify an optional suffix.

Figure 1 Options That Define How Codes Are Generated for Items

(Available for SAS 360 Engage: Direct and SAS 360 Engage: Digital)

Additional Macro Variables for Stored Processes

For a stored process in a process node in an on-premises segment map, the following new macro variables are available:

- SEGMENTMAPNAME
- SEGMENTMAPCODE
- SEGMENTMAPCOUNTSONLY (equivalent of CountOnly in SAS Marketing Automation)
- NODENAME (process node name)
- NODECODE (process node code)
- NODEINPUTSUBJECTID (process node input subject)
- NODEOUTPUTSUBJECTID (process node output subject)
For post-processing an export in a direct marketing task, the new macro variables that are available are TASKNAME and TASKCODE.

If the stored process node has an upstream node in an on-premises segment map, or the stored process node performs post processing in a task, the following new macro variables are available:

- EXPORTID
- EXPORTOUTPUTNAME
- EXPORTOUTPUTPATH
- EXPORTOUTPUTTYPE

(Available for SAS 360 Engage: Digital)

View Outbound Email Tasks with Task Monitor

The task monitor provides better visibility of the status of large tasks such as outbound email tasks for a large target audience. This feature displays the status of the task and key metrics that explain whether the tasks are performing as expected. The data is displayed in tables for either job-level or task-level views. By default, the latest execution of a task is shown for tasks that run repeatedly. The user can drill into a specific execution occurrence to review more than 30 metrics. This data is updated every five minutes from SparkPost, the email delivery partner for SAS Customer Intelligence 360.

Figure 2  Job Information for Bulk Tasks

Figure 3  Execution Details
Move Blocks between Columns of Different Widths

The latest version of Layout Manager enables you to change the layout without re-creating or resizing the content. You can create a two-column section with different widths and move content such as text boxes, buttons, content blocks, and image blocks between the columns. The content automatically adjusts to the width of the column.

In this figure, notice that the two images are contained in columns of different widths.

In this figure, see the result of switching the images from one column to the other.
Define Table-Driven Values for Picklist Custom Properties

The ability to define custom properties with picklists that enable single and multiple selections in the Microsoft Excel template is now available for planning items, workflows, and assets. The functionality was included for tasks, messages, and creatives in a previous release.

In the template, you can add tabs for tables. For example, you might have a table for cities that includes columns for country, state, and ZIP code. When you define a custom picklist property, you can define the source of the picklist values. In addition to referring to a named picklist, you can now refer to a column in a table.

Support for tables in the Microsoft Excel template for custom properties makes it easier to export values from a table in an external system and paste them into the spreadsheet for use in SAS Customer Intelligence 360. For example, you might have a table of brands in another system. You can export the values from the external system and paste them into a tables tab in the spreadsheet. This makes it easier to configure values for picklist-type custom properties.

Configure Custom Properties with Parent-Child Dependencies

The ability to configure custom properties with parent-child dependencies, where the value of a child property is dependent on the value of its parent property, is now available for planning items, workflows, and assets. The feature was included for tasks, messages, and creatives in a previous release.

For example, for the custom properties of country, state, and city, if users select United States as the country, they can select only states in the U.S. for the state property. Likewise, if users select North Carolina as the state, they can select only cities within North Carolina for the city property.

These parent-child dependencies are configured in the Dependencies worksheet in the Microsoft Excel template for custom properties. This feature enables administrators to configure parent-child dependencies that simplify the selection of values for these properties and to reduce the occurrence of data-entry errors.
View the Level Name of a Planning Item from the Breadcrumbs Trail

In addition to showing all previously viewed planning items, the breadcrumbs trail now includes the level name of the planning item that is displayed. You can navigate to a previously viewed planning item by clicking the link in the breadcrumbs trail.

(Available in SAS 360 Plan)

Release 19.04

This release of SAS Customer Intelligence 360 includes the following new features and enhancements.

Upgrade the On-Premises Agent to the New Version of the Direct Marketing Agent

A required upgrade to the direct marketing agent enables the agent to combine existing on-premises agent and satellite components into a single component. The direct marketing agent also now includes new functionality that is associated with the SAS Engage: Direct features that are delivered in the 19.04 release. Customers who are using the existing agent and satellite must install the new combined direct marketing agent (now called direct access point) alongside the existing components. New customers also must install this new version.

Instructions for installing the direct access point are in the “Installation Steps” section in the CI360DirectAgentSetup.docx file. This file is located in the doc folder in the ZIP file that you must download from the Access page in General Settings. To download this ZIP file, create or edit a direct access point, and then click Download Direct Framework on the Download Framework tab.

When installing the new version, the best practice is to download the ZIP file to a new folder and complete the upgrade steps from the CI360DirectAgentSetup.docx file while the existing satellite is running. After you complete the upgrade steps, stop the old agent and the old satellite, and then start the new direct access point (the agent-satellite combination).

The dm commands are now run on the Windows or UNIX command line instead of in the agent console. For information about running the dm commands, see the “Command Line Interface to the CI360 Direct Agent” section in the CI360DirectAgentSetup.docx file.

If you have already completed the configuration steps for the SAS installation that are in the “SAS Metadata Customization”, “SAS Data Item Formats,” and “Information Map Updates” sections in the installation guide, you do not need to complete the steps again.

(Available in SAS 360 Engage: Direct)

Configure Custom Renditions for Assets

Rather than manually creating different renditions, you can configure Assets so that renditions are automatically created when a user uploads an asset of a specific file type.

Renditions are files stored with the asset that can have different sizes (such as 250x250) or formats (such as .png and .jpg) than the original file. For example, you might want to automatically create 250x250 and 300x250 .jpg files each time a user uploads a .png or .jpg file.

You can specify multiple custom rendition types in General Settings ➔ Assets ➔ Custom Renditions.

(Available in SAS 360 Plan, SAS 360 Engage: Direct, SAS 360 Engage: Digital, and SAS 360 Engage: Email)
Duplicate Layout Manager Components in an Email Task

When creating email content, it can be cumbersome and time-consuming to repeatedly add and format the same content elements such as text, images, and buttons.

Now, you can duplicate any content element, including a multiple column block and conditional syntax, that is added in the text block and image block.

**Figure 7  Layout Manager Copy Option**

(Available in SAS 360 Engage: Email)

Receive Email Notification of Completed Bulk Email Task

You can now receive a notification via email when a bulk email task is completed. The notification contains metrics that present details including the total number of recipients that were targeted, the number of email imprints created, and the number of recipients excluded.

Notification can be sent to one or more email addresses. The email address is specified at the send agent level, which is helpful when you have multiple business programs and use separate send agents for each program. This feature helps improve visibility of the task execution process.
Use Ctrl+V to Paste Content into an Email Content Block

CKEditor, which is used to build Layout Manager components, has been updated. For browser security reasons, pasting text into layout editor blocks is no longer supported through a pop-up menu option. Instead, use Ctrl+V to paste copied text into a block.

Note: Clear your browser cache before you access the Layout Manager.

Default Roles for New Users

When the SAS App Central Administrator creates new users in SAS App Central, these users are assigned default roles that match the SAS Customer Intelligence 360 products licensed. For example, if you license SAS 360 Engage: Digital, new users are automatically assigned the following roles: Engage Viewer, Insights Viewer, and Reports Viewer. Assigning default roles ensures that newly created users have limited view-only access to functional areas that match your company’s license. The SAS administrator can add or remove the roles to which a user is assigned via the User Roles page.

Cancel a Workflow Task

Workflow managers can now cancel specific workflow tasks within an active workflow without canceling the entire workflow. For example, the workflow task might not be needed anymore, or the role of the assigned contributor might have changed. When a workflow task is canceled, the task status is updated to Canceled and the workflow timeline progress is updated. In addition, when an active workflow task is canceled, the system sends an email notification to any assigned contributors that have not yet completed the workflow task. The ability to cancel specific workflow tasks gives the workflow manager more flexibility in controlling the execution of the workflow.

(Available in SAS 360 Engage: Email)
Redesigned Financials Tab

The Financials tab is redesigned to make it easier for you to create, edit, and monitor financial information for planning items. At-a-glance visibility into financial performance helps you keep track of budget and spending using key metrics and progress indicators for each planning item.

(Available in SAS 360 Plan)

Updated Reports for Mobile Push Notifications and Mobile In-App Message Tasks

New reports for push notification tasks and in-app message tasks provide useful information about the behavior of your users and enable you to understand what resonates with them. You can track responses and discover how users are interacting with your mobile notifications or mobile messages. This information can be used to customize future campaigns to serve users’ needs better. The reports are available in the Reports section on the Insights tab.

(Available in SAS 360 Engage: Digital)

Direct Access Point

Users can now work with direct access points in SAS Customer Intelligence 360. A direct access point is typically installed on customer premises and is used to process requests from SAS Customer Intelligence 360 in the cloud. This new access point type uses an information map and the customer data mart to process the requests.

(Available in SAS 360 Engage: Direct)

Release 19.03

This release of SAS Customer Intelligence 360 includes the following new features and enhancements.

Announcing SAS 360 Engage: Direct

SAS 360 Engage: Direct is a new offering designed for direct marketing channels. With this new offering, you can query your on-premises data mart to create focused segments for outbound channels and activity maps. You can also associate key marketing messages with each on-premises segment to create targeted lists for fulfillment. When you pair SAS 360 Engage: Direct with SAS 360 Engage: Digital, you can also use your on-premises segments for digital targeting, ensuring that every marketing activity targets the right customer. For example, with SAS 360 Engage: Direct and SAS 360 Engage: Digital, you can create a web task that uses an on-premises segment to define the target audience.

New Asset Viewer Role

Users with the SAS Administrator role in SAS App Central can now add users to a new Asset Viewer role from the User Roles page. This is a read-only role that enables users to view assets without giving those users the rights to change the assets. Users with this role can download renditions such as the original or preview file, view standard and custom properties of an asset, and share assets. Users with the Asset Viewer role cannot edit, delete, copy, or move assets.
Consistent Size of Asset Thumbnails

Now, when you use the tile view for the **Assets** page, the asset thumbnails are all the same size. This consistency makes it easier to browse asset lists to find the desired assets.


Enhanced Asset Sharing Options

The asset sharing dialog box enables you to access internal and external (if enabled) links for one or more assets. The internal links are displayed when you select the **Anyone with the link and authorized access** option. The external links are displayed when you select the **Anyone with the link** option.

If external sharing is not enabled for any of the selected assets, a message is displayed, which states that the link is not available. In the Share dialog box, you can now copy and paste all available links to your clipboard for sharing access to the selected assets.


Table-Driven Values for Picklist Custom Properties

When admin users define custom properties in the Microsoft Excel template, they can use single-select and multi-select picklist custom properties to control how these properties are presented to a user of SAS Customer Intelligence 360.

You can now define picklists by one of these methods:
- a named picklist in the Picklists worksheet (an existing feature)
- a column in a table spreadsheet

The new table feature enables you to cascade or filter values by referencing a table worksheet in the Excel file. Support for tables makes it easier to export values from an external system and paste them into Excel for use in SAS Customer Intelligence 360.

For example, you might have location data in another system with entries for cities that includes columns for country, state, and ZIP code. You can export the values from the external system and paste them in a tables tab in the Excel spreadsheet for custom properties. Then, when you define a single-select or multi-select picklist for this location property, you can reference this table to automatically filter values for the user based on the table entries.

This feature is currently available for custom properties that are associated with tasks, messages, and creatives.


Dependent Parent/Child Custom Properties

You can configure custom properties with a parent/child relationship for the custom property values. This feature enables you to configure dependencies between parents and children to simplify how users select values. This feature can also reduce the likelihood of data entry errors.

For example, assume you have three custom properties in a group—country, state, and city:
The values for "state" should depend on the values selected for "country". Only states in the selected (parent) country should be displayed.

The values for "city" should depend on the values selected for "state". Only cities that are in the selected (parent) state should be displayed.

These parent/child dependencies are configured on a Dependencies tab in the custom properties’ Excel spreadsheet.

This feature is currently available for custom properties that are associated with tasks, messages, and creatives.


New External System Task and Text Creative

The external system task is a new task type that enables you to use an agent to send creatives to an external system. Although the external system task performs similarly to web and mobile spot tasks, it sends a creative to an agent associated with the task instead of to a spot. The external system task can deliver creatives to channels and external systems that are not directly supported by SAS 360 Engage.

For example, an external system task can be associated with an agent that is connected to a call center system. The task is also configured to be triggered by an event, such as a page view event. When the page view event is triggered by a customer, the task sends the creative to the agent. The agent can then pass the creative to the call center system where it can be presented to the customer.

In association with the external system task, a new creative type called Text is now available. A text creative is a creative that contains only unformatted text. When used with external tasks, a text creative enables you to send textual information such as a message to a customer and to external systems that might accept only unformatted text.

This initial release of the external system task lacks the capability to track goals and use the task in an activity. Also, the text creative cannot be used with other types of tasks. These capabilities are planned for future releases.


Easy Access to Email Preview with Three Different Widths

The email preview feature that shows email content across three widths is now easily accessible from the Layout Manager. Simply click the Responsive Previews button to see how the layout appears across three widths: desktop, tablet, and mobile. This feature saves several steps that were previously required to preview static emails.

This feature is also available from the Review tab.
Capture List-Unsubscribe Events Submitted by Customers

You can now capture list-unsubscribe events submitted by customers when the email recipient uses the "unsubscribe" button in email clients such as Gmail.

This feature supports capturing and honoring the list-unsubscribe requests that are sent to SparkPost. This request comes from recipients who no longer want to receive marketing emails. The recipient can click the 'Unsubscribe from mailing list' link presented by providers such as Gmail.

This feature is not a replacement for traditional unsubscribe links in the body of email messages, which continues to be a part of email content.

(Available on ISPs such as Gmail and honored in SAS 360 Engage: Email)

Access to Features Matches Product Licenses

You have the option to license these SAS Customer Intelligence 360 products:

- SAS 360 Discover
- SAS 360 Plan
- SAS 360 Engage: Digital
- SAS 360 Engage: Direct
- SAS 360 Engage: Email
SAS 360 Engage: Email Testing

Access to specific features and functionality is based on the products you license, affecting access in these areas:

- Assigning user roles: The roles available for assignment match the roles associated with the specific products that you license. This access helps the administrator assign appropriate roles for each user.
- Visibility of features in the user interface: Only the features related to the SAS Customer Intelligence 360 products that you license are visible in the user interface.

Displaying only the features and functionality that are applicable to the products that you license provides a more streamlined user interface by removing unnecessary elements.


New SAS 360 Plan Roles

Administrative users can now assign users new Planning roles via the User Roles interface by selecting **Configuration ➔ General Settings** from the navigation bar. With the new SAS 360 Plan roles, users have more flexibility to view SAS 360 Plan information, but users with this role are prevented from changing information.

Users who have these roles can create, edit, and delete comments on plan items.

- Users with the Plan Viewer role can view all areas of SAS 360 Plan.
- Plan Financials and Planning Viewer roles are renamed to Plan Financials Viewer. With this role, users can view planning items and financial information for the planning items.
- Users with the Planning Viewer role can view planning items without the ability to view financial information.

(Available in SAS 360 Plan)

Add Cost Centers to Invoices and Commitments

From **Plans ➔ Financials**, you can add cost centers directly from a commitment or invoice. You can keep track of cost centers that are used with the planning item and the associated commitments and invoices. When you want to add a cost center, you begin with a list of already selected cost centers as the first step. A cost center that is not previously associated with the planning item can be easily added with a click action.

When you add a cost center to a commitment that is not previously used for the planning item, associated commitments, or invoices, the cost center is automatically added to the planning item. This enhancement helps you keep your cost center distributions in sync. SAS 360 Plan keeps track of the assigned amounts and expenses, ensuring that you always know the current values.

(Available in SAS 360 Plan)

Release 19.01

This release of SAS Customer Intelligence 360 includes the following new features and enhancements.
Enter Codes Manually

A **Code** field is now available on the **Properties** tab for the following objects in SAS Customer Intelligence 360: Segment Maps, Activities, Creatives, Messages, and Tasks. You can manually enter a code in this field. This code might be used to identify an object for auditing or reporting.

(Available in CI 360 Engage)

Include Short URLs in Plain-Text Email Content

When you create content for a plain-text email, you can shorten all the URLs, including the Call-to-Action URLs. This allows plain-text emails with long URLs with customer domains to be tracked. To do this, your marketing organization must create a CNAME in the DNS to route traffic from links that are specified in the organization’s domain to the domain of the tracking service for SAS Customer Intelligence 360.

For example, SampleOrganization uses the `s-link.sampleorganization.com` domain, but the production tracking tier for SAS Customer Intelligence 360 is `tracking-euw.ci360.sas.com`. A CNAME needs to be created in the DNS that is similar to this example:

```
s-link.sampleorganization.com CNAME tracking-euw.ci360.sas.com
```

The system automatically shortens your long URLs and uses the domain name of your organization. As a result, recipients of the email know who the message is from.

(Available in SAS 360 Engage)

Send HTML and Text Emails in the Same Communication

You can now send multi-purpose email messages (in MIME format) from a single task. The email can contain both HTML and plain-text versions of your messages. Your recipients can read the content regardless of the type of client or device that they might be using.

The user interface for creating email content now provides an option to create the plain-text version of email in the same email task.

*Figure 11  HTML and Plain Text in the Same Email Task*
Adjust the Horizontal Width of a Multi-Column Block

In this release, you can set the horizontal width for a multi-column block so that it occupies almost the full width of 600 pixels. You can now set a single property to add space to both the left and right sides of a multi-column.

Note: After testing with several clients, the minimum horizontal spacing is restricted to 6 pixels on both sides. This is to prevent content from being distorted in some email clients such as Microsoft Outlook.

Add an Opt-Out Notice and Link to Plain-Text Emails by Default

Plain-text emails carry the same legal obligations that HTML marketing email messages carry. The recipient of the email should be given the opportunity to opt out of receiving further emails and this should be as simple as possible to do.

In this release, a default opt-out notice is now added to the content of new emails to ensure that you remember to enable your customers to opt out of emails. You can remove this notice or modify it as desired.

The standard default notice includes a merge tag. The merge tag is used to insert the recipient email address so that you can confirm who the message was sent to. In addition, there is a merge tag for the opt-out link that your customers can use to request that no further messages are sent.
Specify an External Image for In-App Message and Push Notification Creatives

Using a URL, you can now reference an external, publicly available image when specifying an image for in-app messages and push notifications that use image-based creatives.

When you add an image to the creative, a window is displayed that enables you to either select an image from the asset repository or provide an image URL. The URL must reference a publicly available image for the creative to render correctly.

Note: The supported file formats for images that you can include in in-app messages and push notifications are .jpeg, .jpg, and .png.

(Available in SAS 360 Engage)

Key Metric Tiles for Mobile Push Notifications and Email

By viewing the Key Metric tiles available on the home page for SAS Customer Intelligence 360, you can see the performance of key metrics to know whether your marketing activities are performing as expected. For example, you can see the top mobile push notification tasks by sent or opened metrics. You could also identify the email tasks with the most attempts, hard bounces, opens, or clicks.

(Available in SAS 360 Engage)

Release 18.12

This release of SAS Customer Intelligence 360 includes the following new features and enhancements.

Create Spots, Messages, and Creatives Directly from Tasks

(Available in SAS 360 Engage)

When you create or edit a task, you might need a new spot, message, or creative to use in that task. Now you can save time by creating spots, messages, and creatives from a task. As a result, you no longer need to navigate away from a task to create the spot, message, or creative.

View the Total Number of Email Previews and Spam Tests Run by Users in Your Organization

You can now run email previews and spam tests as an optional paid-for service. You can run 100 tests each year at no additional cost. After exceeding the 100-test limit, a fee is required for every additional test.

The total number of tests that are run by all users within the organization is displayed on the Review tab of an email task so that you can track how many tests have been executed. You can also view the split count to see how many email previews or spam tests were run. It is recommended that you adopt some best practices about how to reuse the tests and get the most out of this capability. If required, an administrator can hide this functionality to prevent unwanted usage by non-authorized users.
Download Sample Email Templates

You can now get a bundled ZIP file that contains sample email templates. These templates can be imported into the system as assets. Use the email templates to make email content creation easier and more efficient.

Filter User Roles by License

(Available in SAS 360 Discover, SAS 360 Engage, and SAS 360 Plan)

As an administrator, you can assign roles to users to control user access rights. When you edit roles for users, the list of available roles is now filtered based on your license. Filtering the list of available roles based on your license simplifies user management and ensures that you select only the roles that apply to the SAS solutions that you use.
For example, if you have a license for only SAS 360 Discover, you can select only the roles that are associated with SAS 360 Discover. Similarly, if you have licenses for SAS 360 Engage and SAS 360 Plan, you can select roles that are associated with either SAS 360 Engage or SAS 360 Plan.

Associate Standard Events from SAS 360 Engage with an External Agent

The following event types from SAS 360 Engage can now be associated with an external agent:

- identity
- impression
- impression viewable
- email events: send, open, click, opt-out, hard bounce, complaint, and view
- mobile inApp events: send, open, button1click, button2click, and button3click
- mobile push notification tasks: send, click, and discard
- new user session
- conversion
- response
- spot clicked
- click through
- milestones

As a result, a wider range of events can be sent to external systems via an agent. This capability can provide a richer context when analyzing customer behavior or triggering processes in external systems.

Add Title Text and Images to Push Notification Creatives

You can now publish more engaging push notifications by including title text and images in your creatives.
For example, a retailer might want to invite customers to open their mobile app and sign up for a special in-store event, such as a beauty workshop. With an eye-catching title, notification text, and an image, the creative could look something like this:
Notice that two views are displayed: initial (unopened) and expanded (opened). These views enable a user to visualize how the message might appear, based on how the user interacts with the push notification creative on a mobile device.

Note: Your push notification creative can be rendered in different ways depending on the mobile device and the mobile operating system. Test your creatives on several devices to ensure that the notification is rendered how you want.

Configure Company Holidays

(Available in SAS 360 Plan)

As an administrator, you can now configure company holidays for each year. These holidays can be displayed on calendars and be excluded from workflow timelines. Configuring company holidays provides visibility for planning and workflow users so that they can plan schedules accordingly.

For example, if you configure a holiday for January 1, this date cannot be selected as a due date in a workflow task. In addition, the date is not counted as a working day in timeline calculations for workflow end dates.

You can configure company holidays in the Calendars section, which is accessed from the Settings menu in Plans.
Modify Active Workflow Tasks

(Available in SAS 360 Plan)

As a workflow manager, you might need to modify workflow tasks after they have been initiated. For example, you might need to modify due dates, add or modify instructions, or cancel an assigned contributor. You can now make such modifications to active workflow tasks from the Workflow Tasks tab in a workflow.

Any modifications that affect dates (such as modifying due dates or canceling contributors) are automatically reflected in all workflow timeline calculations. In addition, the system sends notifications to affected contributors. For example, if you adjust the due dates for a workflow task contributor, the system automatically sends a notification to the affected contributor.

User-friendly Item Identifier

(Available in SAS 360 Plan)

Each planning item, commitment, or invoice includes a customizable unique identifier that enables you to easily reference the item. IDs are unique for the type of item you are creating: planning item, commitment, or invoice. Item IDs can include numbers, characters, and symbols.

Note: Item uniqueness is checked based on this ID, so an item’s name no longer must be unique.

When you migrate existing items or create planning tasks or activities through SAS 360 Engage, the system creates the unique system ID. This system ID is editable. You can also import this ID through the Plan API or by using the import feature with a Microsoft Excel spreadsheet.

Figure 19 User-friendly Item ID

Keep Track of Spending

(Available in SAS 360 Plan)

The Expenses Overview section gives you a better understanding of how much money you have spent for a planning item, the amount that is still promised to vendors, and the amount that is already paid. In addition, this section enables you to review the following items:
- the open commitment amount, which is the amount that you have promised minus any paid invoices
- a sum of all invoices, which includes direct invoice amounts for the planning item and invoice amounts that are associated with the commitment
- expense totals, which are the outstanding commitments plus any invoices, so you know how much money is still available to invest in each planning item

Figure 20  Expenses Overview

Quick Facts for Media Consumption

(Available in SAS 360 Discover)

The Media Consumption report delivers insightful details about the various media that are promoted within the site domain or domains. Media consumption mainly focuses on viewable content within the site architecture. You can now see the most pertinent facts about this report from the quick facts page.

Release 18.11

Access Link to Associated Workflow

(Available in SAS 360 Plan)

You can now catalog files directly from a workflow to assets from the File Catalog tab. For assets that are created from workflows, you can access the associated workflow link from an asset. The workflow link is on the Summary tab in the asset details. You can view the history of the asset within the workflow, including creation, review, and approval.
Specify Additional Attributes when Adding Image Assets to HTML Creatives

(Available in SAS 360 Engage)

When you add images to HTML creatives, you can now browse and select assets in addition to providing a URL for the image. After selecting an asset, you can define other attributes such as alternative text and the call-to-action link. You can specify these attributes without entering the text directly in the HTML editor.

Add View-on-Web Text with a Hyperlink

(Available in SAS 360 Engage)

You can now add View-on-Web Text from the Layout Gallery to the email content by using a drag-and-drop operation. View-on-Web Text contains default text and a merge tag that automatically inserts a hyperlink in the email message. Clicking the hyperlink enables recipients to view the email content in their browser. In earlier releases, you had to complete several manual steps to add a view-on-web link.

When you add View-on-Web Text from the Layout Gallery, you can use all the editing and formatting capabilities that are available for a text block. Email recipients can see the View-on-Web Text when the message is viewed in the email client, not in the browser.

Add a Background Color to the Email Content

(Available in SAS 360 Engage)

You can now add a background color to your entire email message. You can choose a background color to reflect a brand identity, or to reflect seasonal and festive themes. This feature enables you to
use the color picker control and select from a standard color palette. Alternatively, you can specify a custom color by using numeric RGB values or Hexadecimal values.

Figure 22  Email Background Color

Enhanced Email Preview and Spam Test
(Available in SAS 360 Engage)

You can now preview email content on more than 70 email clients and devices, and on several Internet Service Providers (ISPs). The preview can be executed by clicking Run in any email task that has a Designing status. The test results are available typically within 10 minutes, and they show multiple previews including a thumbnail view, a no-image view, and a full-image view.

The spam test enables you to test whether your email content might be marked as spam. Results from the spam check contain spam scores and detailed information that is provided by the spam filters. You can also view historical records of all the previous tests that were run.

Figure 23  Email Preview and Spam Test
New Quick Facts Tab for Internal Searches, Forms, and Business Processes Reports

(Available in SAS 360 Discover)

Key reports now include a Quick Facts tab that presents the most pertinent facts about the report.

- The Internal Searches report analyzes the effectiveness of internal searches in locating information. View key information about search volume, search terms, and failed searches.
- The Forms report uses the highest number of completed forms and the highest number of abandoned forms to analyze user interaction with forms. Find key results for completed and abandoned forms.
The Business Processes report analyzes the success and abandonment rates of multi-step business processes. Understand the processes and steps that are completed and abandoned by users.

Real-time Reporting
(Available in SAS 360 Engage)
Understand how people are reacting to your digital marketing content by monitoring activity as it happens. Monitoring key tasks helps you understand whether users are responding to your email campaign, or whether mobile device users are engaged with your app so that you can change direction as needed. Find these real-time reports from the Insights icon on the left navigation bar:

- Real-Time Email Task Performance
- Real-Time Mobile App Performance
- Real-Time Push Notification Task Performance

The Email Task Performance report is also available from Task Insights.

![Mobile Real Time Report](image)

Greater Flexibility in Generating Impression-related Click Events with JavaScript
(Available in SAS 360 Engage)
Web developers who use their own JavaScript to deliver content to pages might not want to rely on the SAS tag to derive impression and impression viewable events from the defined spot. With enhancements to the JavaScript API, SAS Customer Intelligence 360 now enables you to perform these tasks:
- send an impression (spot change) event when a creative is delivered by SAS Customer Intelligence 360.

- trigger an impression viewable (spot viewable) event when the content is displayed. This action enables you to control how you define when content is viewed and when to send this event.

- send an impression click (spot click) event when a user performs a click-through action on a spot’s creative.

For example, you might define a web spot as a “dummy” object in order to set up a web task. When the SAS tag delivers the content to the web page, you can use the JavaScript API (instead of events defined in the user interface) to trigger the impression-related events in SAS Customer Intelligence 360. If you do not change the spot and use other methods for displaying content (such as a modal window), you can still ensure that the impressions and impression viewable events are counted accurately.

Download PDF Files with Annotations and Comments
(Available in SAS 360 Plan)

Users who have access to a workflow can now download a PDF file with embedded annotations and comments. You have the option to download files with or without annotations. You can also share the annotated file with people who might not have access to SAS Customer Intelligence 360.