

Horizon 3.6

New Features, Improvements & Bug Fixes



Contents

What's New

- Contact record usability

- Tracking progress towards attaining wishlisted rewards

Improvements

Fixed issues

Appendix

- Contact record screenshots

 - General

 - Permissions and preferences

 - Loyalty and rewards

 - Audit cases

 - Contact activity

 - Notes

 - Custom fields

Horizon release 3.6 | November 2019

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What's New

The following key new features have been delivered with Horizon 3.6:

Contact Record Usability

To make the contact record easier to navigate the page has been tabbed; this makes it quicker to find what's important and floats key contact information to the top of the screen.

The contact attributes have been grouped into the following sections¹:



Fig. 1 | The tabs for navigating a contact record

- **General:** Personalized event stream and daily trends for the contact along with Persona & Lifecycle stages, general contact attributes and location information.
- **Permissions and preferences:** Channels and the audit trail of changes to a contact's permissions and preferences.
- **Order insight:** Order insight calculated fields and all financial transaction activity for a contact (including the ability to extend a transaction to show the associated line items).
- **Loyalty and rewards:** All loyalty-related attributes including a members wallet, wish-list and loyalty cards. This tab will only be available if our loyalty product is enabled within your account.
- **Contact activity:** Audit trail of all contact activities including campaigns, loyalty behavior completion (if using loyalty) and changes in the contact's group membership.
- **Notes:** All contact notes added against the contact.
- **Custom fields:** If you've created any sets of custom fields for your account they will be grouped within this tab.

1. See the appendix section of this document for screenshots of each tab.

Tracking progress towards attaining wishlisted rewards

We've productized the capability to search and segment members based on their progress towards affording tiered rewards that are on their wishlist. It's also possible to personalize message content with the relevant details too.

The screenshot below shows the advanced search (and segment) filter for wishlist with two new options:

- Wishlisted rewards achievable
- Wishlisted rewards in progress

These allow a user to search for members based on the number of items on their wishlist they can afford to redeem and those that they're on the way to affording.

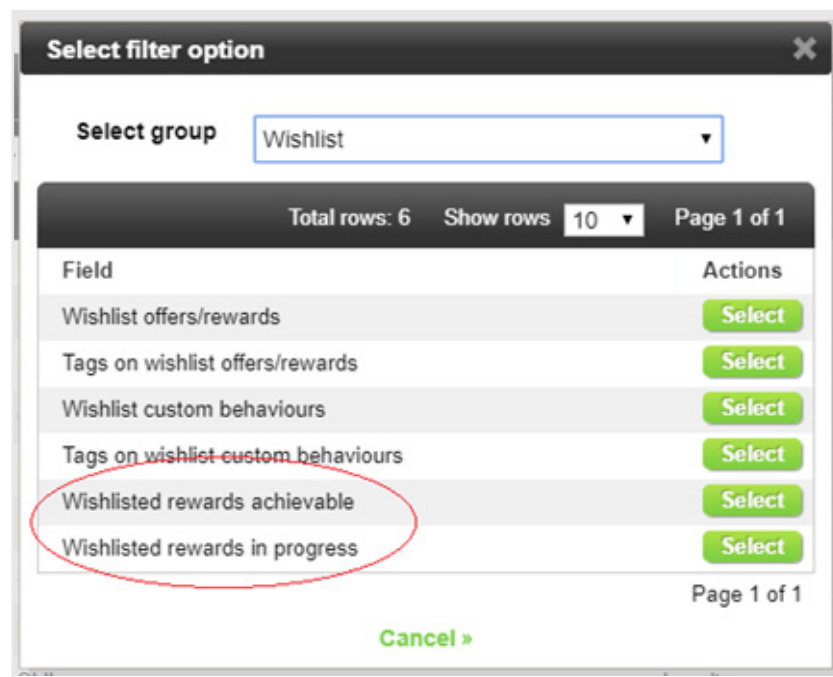


Fig. 2 | New wishlist search and segment criteria

Within the wishlist panel on the contact record there's also 3 new columns related to this new capability:

- Can afford?; indicates if the member can currently afford the tiered reward based on it's cost and their current reward points balance
- Points required; if they cannot currently afford the tiered reward then this field will indicate how many points they need in order to afford it
- Progress; a percentage value showing how close to affording the tiered reward the member is

Total rows: 13 Show rows 10 ▼ Page 1 of 2 ◀ ▶			
Point cost/value	Can afford?	Points required	Progress
8	Yes	0	100%
1000	Yes	0	100%
2000	No	630	68.50%
50000	No	48630	2.74%

Page 1 of 2 ◀ ▶

Fig. 3 | New wishlist columns on the Loyalty and Rewards tab of the contact record

There's also a range of new smart inserts that have been added, which means message content can be personalized with wishlisted tiered rewards that a member is progressing towards affording and those that they can afford.

It's possible to include smart inserts for up to 3 tiered rewards that are 'achieved' and in 'progress'. 'Achieved wishlist reward 1' will substitute the details of the tiered reward the member can afford which costs the most points. For 'Progress wishlist reward 1' this will be the details for the tiered reward the member is closest to affording.

Select smart insert / merge tags				
Select group type	Offer Management ▼	Select group	Wishlist Achieved ▼	
Total rows: 51 ◀ ▶ ▶▶				
Title	Value	Read-only	Mandatory	Actions
Achieved wishlist reward 1 ID	WISHLISTACHIEVEDREWARD1-ID			Select
Achieved wishlist reward 1 name	WISHLISTACHIEVEDREWARD1-NAME			Select
Achieved wishlist reward 1 short description	WISHLISTACHIEVEDREWARD1-SHORTDESC			Select
Achieved wishlist reward 1 long description	WISHLISTACHIEVEDREWARD1-LONGDESC			Select
Achieved wishlist reward 1 image 1	WISHLISTACHIEVEDREWARD1-IMAGE1			Select
Achieved wishlist reward 1 image 2	WISHLISTACHIEVEDREWARD1-IMAGE2			Select
Achieved wishlist reward 1 image 3	WISHLISTACHIEVEDREWARD1-IMAGE3			Select
Achieved wishlist reward 1 URL 1	WISHLISTACHIEVEDREWARD1-URL1			Select
Achieved wishlist reward 1 URL 2	WISHLISTACHIEVEDREWARD1-URL2			Select
Achieved wishlist reward 1 URL 3	WISHLISTACHIEVEDREWARD1-URL3			Select

◀ ▶ ▶▶ Cancel »

Fig. 4 | Smart inserts for "Wishlist Achieved"

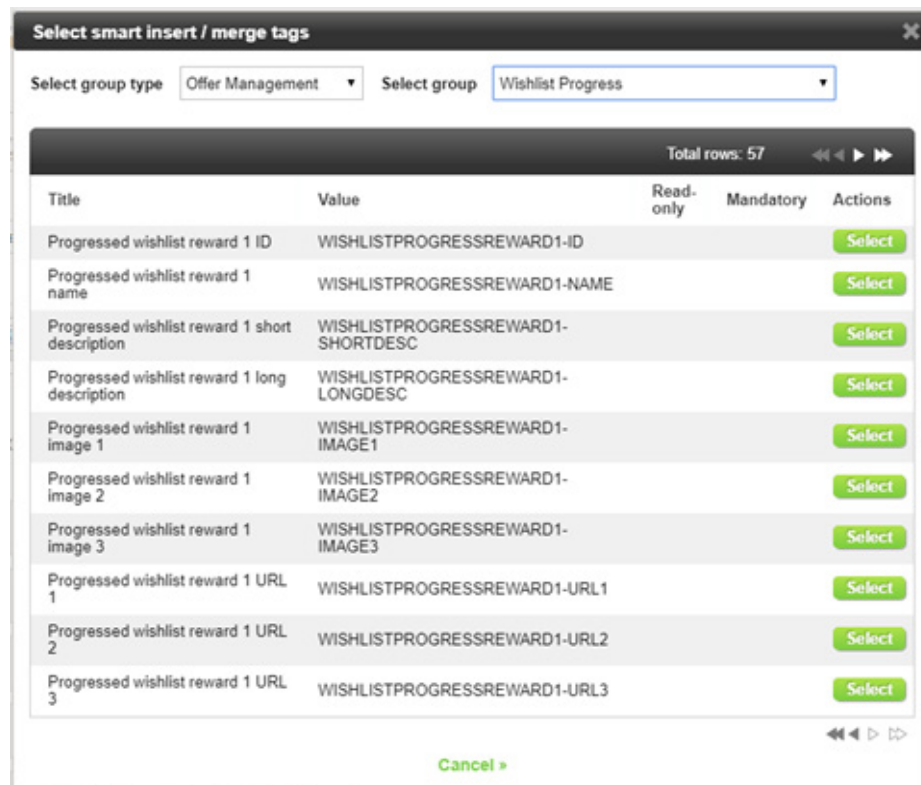


Fig. 5 | Smart inserts for "Wishlist Progress"

Improvements

Below are some key improvements that have been delivered in Horizon 3.6:

1. **SparkPost:** We've integrated with SparkPost for email message delivery. We will be migrating customers over from PMTA to SparkPost in due course. Please contact customer support or your Account Manager if you have any questions relating to this activity.
2. **Support for multi-line transactions within transaction import:** Added support for multi-line transaction processing when handling 'currency to point' exchange rates; both quantity and currency-based transactions are now supported.
3. **Enhancements to search and segmentation on transactions:** Exposed a richer set of transaction basket and line item attributes for search and segmentation.
4. **Made the width of the Horizon date picker a standard size:** Standardized the width of the date picker so the size is consistent when scrolling through months.
5. **Linking the voucher code redeemed by a member to the appropriate basket line item:** Ability to identify which line item in a transaction had a voucher code applied to it.
6. **Show the offer end and start date on the offers table:** Made it easier to identify when offers are starting and ending without the need to open up an individual offer.

7. **Scroll bar for group 'tags' at the top of the contact record:** If a contact has more than 6 rows of group 'tags' showing at the top of record then a scroll bar is added to reduce the amount of screen space used.
8. **Added pagination to import and export summary page:** The import and export summary page both now support pagination making it easier to navigate through results.

Fixed Issues

The following customer-affecting issues have all been resolved in Horizon 3.6:

1. Fixed issue with new publication vanity URLs presenting a 404 error page
2. Fixed issue with in-line styling anomalies presented within IE 11 web browser

HTK horizon

[Logged in as HTKAdmin](#)
[Account](#)
[PGI](#)
[change...](#)

[Manage my account](#)
[Logout](#)
[Help Center](#)
[Settings](#)

[Home](#)
[Contacts](#)
[Content](#)
[Offer Management](#)
[Loyalty Management](#)
[Campaigns](#)
[Floral Events](#)
[Triggered Actions](#)
[Reports](#)
[Add-ons](#)
[Visualisation](#)

Contact database

All contacts

Segmentation

Groups

Personas

Tools

Group builder

Data management

Contact import

Import summary

Export summary

Recent items

Dave Sidhman

Richard Mulberry Works

Patricia Schindler

Richard Mulberry Social

Patricia Gervit

Richard Mulberry Works

Richard Mulberry Works

Richard Mulberry Works

Richard Mulberry Works

Richard Mulberry Social

Edit contact

Dave Sidhman

Persona: Family | Lifecycle Stage: New Member

Engagement

Loyalty

Value

Influence

Sentiment

★★★★★

★★★★★

★★★★★

★★★★★

★★★★★

Go to Relationship scores +

Completed information log rule

W.D. 38421414 Rule Group

W.D. 38421414 Rule Group

W.D. 38421414 Rule Group

W.D. 38421414 Rule Group

W.D. 38421414 Rule Group

W.D. 38421414 Rule Group

General

Permissions and preferences

Order insight

Loyalty and rewards

Audit cases

Contact activity

Notes

Custom fields

Dave's event stream

Click to scroll back to top

Dave has updated their profile field

14 minutes ago

Dave has updated their profile field

14 minutes ago

Dave has updated their profile field

14 minutes ago

Dave has updated their profile field

14 minutes ago

Dave has updated their profile field

14 minutes ago

Dave has updated their profile field

14 minutes ago

Dave has updated their profile field

14 minutes ago

Dave's daily trend

10 events in the past 24 hours

Persona & Lifecycle stage

Persona

Family

assign automatically

Lifecycle stage

New Member

assign automatically

add a new lifecycle stage +

General

Type of contact

Loyalty

Status

Individual

Title

First name

Dave

Last name

Sidhman

Gender

Date of birth

Termination Date

TTB Account Number

Exclude from processing?

Protected

Location

Add a location

Index

Type

Location information

Actions

1

Address

HTK LTD, CHAPMANS WAREHOUSE, WHERRY QUAY, IPSWICH, IP13AS, United Kingdom of Great Britain and Northern Ireland (the)

Self service login

Save contact

Close +

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Permissions & Preferences

HTKhorizon

Logged in as HTKAdmin Account PGS [change](#)
Manage my account | Logout [Help Content](#) [Settings](#)

Home Contacts Content Offer Management Loyalty Management Campaigns Flood Events Triggered Actions Reports Add-ons Visualisation

Contact database

All contacts

Segmentation

Groups

Personas

Tools

Group builder

Data management

Contact import

Import summary

Export summary

Recent items

Dave Sidhuman

Richard Mulberry visits...

Patricia Schrickson

Richard Mulberry Social...

Patricia Gensitz

Richard Mulberry visits...

Richard Mulberry visits...

Richard Mulberry 07091b...

Richard Mulberry visits...

Richard Mulberry Social...

Edit contact

Dave Sidhuman

Persona: Family | Lifecycle Stage: New Member

Engagement

Loyalty

Value

Influence

Sentiment

☆☆☆☆

☆☆☆☆

☆☆☆☆

☆☆☆☆

☆☆☆☆

Go to Relationship scores >

Completed behaviour tag rule

Test

RCM

Loyalty

Test

Mail test

Test

WJ 20142018 Rule Group

RCM Group Access

Loyalty account status SQL

General

Permissions and preferences

Order insight

Loyalty and rewards

Audit cases

Contact activity

Notes

Custom fields

Channels

Add a channel

Type	Send To	Comments	Opt.in categories	Priority	Contactable?	Actions
Email	dcsidscdr_1571845096@fbnw...			1	<input checked="" type="checkbox"/>	

Permissions and Preferences

Total rows: 1 Show rows 10 Page 1 of 1

Created Date	Source	Activity	Channel	Description	Author
24/10/2019 10:28	Loyalty portal services	Enrol for loyalty		Contact enrolled into loyalty scheme	System

Page 1 of 1

Save contact

Close

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HTK horizon
Log in as HTK Admin Account POS change
Manage my account | Logout Logout

Contact database

All contacts

Segmentation

Groups

Personalities

Tools

Group builder

Data management

Contact input

Import summary

Export summary

Edit contact

Dave Sidihaman
Person: Family (Legacy Regs New Member)

Engagement ★★★★★

Loyalty ★★★★★

Alert ★★★★★

Influence ★★★★★

Assessment ★★★★★

Completed Influence tag rule
New
New
New
New
New

MKTG 3000010 Rule Group
CRM Group Action
Loyalty account status MGT

General
Permissions and preferences
Order insight
Loyalty and rewards
Audit cases
Contact activity
Notes
Custom fields

Loyalty & Rewards

Date joined scheme 24/10/2019 10:26

Last login date 24/10/2019 10:26

Scheme withdrawal date

Business Name

Eligible? N

Loyalty Account Status ACTIVE Suspend Suspend with audit case Close

Account Status activity

Status	Eligible	DateTime
ACTIVE	true	24/10/2019 10:26:00

Total rows: 1 Show rows [1] Page 1 of 1

Loyalty Membership Number

Reward Points Balance

Home title

Referral ID

Card number

Membership Type Individual ▼

Member level Gold ▼ at assign automatically

Points expiration date 27/10/2020 16:36

Loyalty Transaction Activity

[Add loyalty transaction item](#)

ID	DateTime	Activity	Description	Completed By	Pts collected/spent	Card Number	Action
EIN-2019-4	24/10/2019 10:26	LOYALTY_2019SCUR	Watch Tape Behaviour	System generated	3		
EIN-2019-3	24/10/2019 10:26	CONNECT_SOCIAL_ACMT	Social Connect activity (PTE)	Member	100		
EIN-2019-2	24/10/2019 10:26	ENROLLMENT	Custom description for enrol in the loyalty scheme	Member	19		
EIN-2019-1	24/10/2019 10:26	ACCOUNT_CREATION	Custom description for opening balance	Member	36		

Page 1 of 1

Member wallet

There are currently no rewards or offers in this wallet.

Member wishlist

There are currently no rewards, offers or custom behaviours on this wishlist.

Loyalty Cards

[Add new reward card](#)

Registration Date	Card Number	Type of Card	First Expiry Date	Last Expiry Date	Card Issued Date	Card Request Type
	0401003000119					

Page 1 of 1

Card Requests

[View card request](#)

Request Date	Ref No	Reason	Request Type	Comment	Request Status
			No records		

Save Contact
Close

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Audit Cases

HTK horizon

[Logged in as HTKAdmin](#)
[Account PGS change](#)
[Manage my account](#)
[Logout](#)
[Help Content](#)
[Settings](#)

[Home](#)
[Contacts](#)
[Content](#)
[Offer Management](#)
[Loyalty Management](#)
[Campaigns](#)
[Event Events](#)
[Triggered Actions](#)
[Reports](#)
[Add-ons](#)
[Visualisation](#)

Contact database

All contacts

Segmentation

Groups

Personas

Tools

Group builder

Data management

Contact import

Import summary

Export summary

Recent items

Dave Sidhuman

Richard Mulberry White...

Patricia Schwedman

Richard Mulberry Social...

Patricia Gmütz

Richard Mulberry White...

Richard Mulberry White...

Richard Mulberry 07091b...

Richard Mulberry white...

Richard Mulberry Social...

Edit contact

Dave Sidhuman

Persona: Family | Lifecycle Stage: New Member

Engagement

Loyalty

Value

Influence

Sentiment

Go to Relationship scores >

Completed behaviour tag rule

test2

RCM

loyalty

test

Mail test

test

RF JB 3040198 Rule Group

RCM Group Access

loyalty account status SQL

General

Permissions and preferences

Order insight

Loyalty and rewards

Audit cases

Contact activity

Notes

Custom fields

Fraud audit cases

+

Add new audit case

There are currently no audit cases

It is possible to exclude a member from fraud checks for 12 months by clicking the button below:

+

Exclude from fraud checks

Status	Date/Time set	Date/Time expires	User
No records			

Save contact

Close >

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[Help](#)
[About HTK](#)

Contact Activity

HTK horizon

[Logged in as HTKAdmin](#)
[Account PGS change](#)
[Manage my account](#)
[Logout](#)
[Help Content](#)
[Settings](#)

[Home](#)
[Contacts](#)
[Content](#)
[Offer Management](#)
[Loyalty Management](#)
[Campaigns](#)
[Event Events](#)
[Triggered Actions](#)
[Reports](#)
[Add-ons](#)
[Visualisation](#)

Contact database

All contacts

Segmentation

Groups

Personas

Tools

Group builder

Data management

Contact import

Import summary

Export summary

Recent items

Dave Sidhuman

Richard Mulberry White...

Patricia Schwedman

Richard Mulberry Social...

Patricia Gmütz

Richard Mulberry White...

Richard Mulberry White...

Richard Mulberry 07091b...

Richard Mulberry white...

Richard Mulberry Social...

Edit contact

Dave Sidhuman

Persona: Family | Lifecycle Stage: New Member

Engagement

Loyalty

Value

Influence

Sentiment

Go to Relationship scores >

Completed behaviour tag rule

test2

RCM

loyalty

test

Mail test

test

RF JB 3040198 Rule Group

RCM Group Access

loyalty account status SQL

General

Permissions and preferences

Order insight

Loyalty and rewards

Audit cases

Contact activity

Notes

Custom fields

Recent campaign activity

Status	Name	Time
Last Sent		24/10/2019 09:28
Last Delivered		24/10/2019 09:31

Contact activity

General

Campaign

Loyalty Behaviour

Group Membership

Advanced search >

Search

Total rows: 4

Show rows: 10

Page 1 of 1

Completed Date	ID	Loyalty Behaviour	Categories	Completed By	Approval required?	Actions
24/10/2019 16:30	ACT-2019-4	Match Tags Behaviour		System generated		✕
24/10/2019 16:30	ACT-2019-3	Behaviour with empty rule		System generated		✕
24/10/2019 10:28	ACT-2019-2	Social Connect		Member		✕
24/10/2019 10:28	ACT-2019-1	Enrol in loyalty scheme		Member		✕

Page 1 of 1

Save contact

Close >

Horizon 3.7 > SNAPSHOT_WIP

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Notes

The screenshot shows the 'Edit contact' page for 'Dave Sidhuman' in the HTK horizon system. The left sidebar contains navigation menus for 'Contact database', 'Segmentation', 'Tools', 'Data management', and 'Recent items'. The main content area has tabs for 'General', 'Permissions and preferences', 'Order insight', 'Loyalty and rewards', 'Audit cases', 'Contact activity', 'Notes', and 'Custom fields'. The 'Notes' tab is active, displaying a message: 'There are currently no notes'. Below this message are 'Save contact' and 'Close' buttons. The footer indicates 'Horizon 3.7 x-SNAPSHOT_WIP' and 'Copyright © 2007-2019 HTK Limited'.

Custom Fields

This screenshot shows the 'Edit contact' page for 'Dave Sidhuman' with the 'Custom fields' tab selected. The 'Custom fields' tab is active, showing a 'Date text custom field' section. This section includes a 'Format date' field with the value '14/11/2019' and a 'Text box' field with the value 'Some text'. Below these fields are 'Save contact' and 'Close' buttons. The rest of the page layout, including the sidebar and top navigation, is identical to the previous screenshot. The footer shows 'Horizon 3.7 x-SNAPSHOT_WIP' and 'Copyright © 2007-2019 HTK Limited'.