

Release Note

Horizon 3.6 New Features, Improvements & Bug Fixes



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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:

Edit cont							
	Lifecycle Stage: New Memb	er					
				Q	e		
	Engagement	Loyalty	Value	Influence	Sentiment		
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General P	ermissions and preference	es Order insig	ht Loyalty and	rewards Audi	t cases Contact activity	Notes	Custom fields

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, wishlist 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.

Select group	Wishlist	
-	Total rows: 6 Show rows 10	Page 1 of 1
Field		Actions
Wishlist offers/rev	vards	Select
Tags on wishlist o	ffers/rewards	Select
Wishlist custom b	ehaviours	Select
Tags on wishlist o	ustom behaviours	Select
Wishlisted reward	ls achievable	Select
Wishlisted reward	is in progress	Select

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 r	ows: 13 Show row	s <mark>10 ▼</mark> 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.

elect group type	Offer Manageme	nt •	Select group	Wishlist Achieved			•
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Achieved wishlist r 3	reward 1 image	WISHL	ISTACHIEVEDR	EWARD1-IMAGE3			Select
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Achieved wishlist r	reward 1 URL 2	WISHL	ISTACHIEVEDR	EWARD1-URL2			Select
Achieved wishlist r	reward 1 URL 3	WISHL	ISTACHIEVEDR	EWARD1-URL3			Select

Fig. 4 | Smart inserts for "Wishlist Achieved"

elect group type	Offer Managemer	t •	Select group	Wishlist Progress			•
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Title		Value			Read- only	Mandatory	Actions
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Progressed wishlis	st reward 1 URL	WISHL	ISTPROGRESSI	REWARD1-URL3			Select

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

Appendix

Contact record screenshots

General

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Audit Cases

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