

HTK

Data-driven
CX & loyalty

Release Note

Horizon 3.11

New Features, Improvements & Bug Fixes



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What's New

The following are key new features and capabilities that have been delivered with HTK Horizon 3.11:

Rolling points expiry

This release sees the introduction of rolling expiry points. When rolling expiry points are enabled, only “unused” points will expire on the member’s expiry date.

For example:

The rolling expiry points are set to expire in 365 days.

On 01/01/2021 a member earned 500 points, making their points balance 500 points.

On 01/06/2021, the member makes a transaction which earns them 50 points. Their new points balance is 550 points.

On 01/06/2021, the member spends 200 points on a reward. Their new points balance is 350 points.

On 01/01/2022, the member’s points expire. As the member spent 200 points on a reward, 300 points expired from the points earned on 01/01/2021. Their new points balance is 50 points.

Enabled Rolling Points Expiry

Rolling Points Expiry can be found under Loyalty Management > Point expiry rules.

Point expiry rules

Here you can enable and select the point expiry rules to operate. When making changes to expiry rules, the new rules will only come into affect the next time there is a change to a member's points balance.

Enable point expiry rules?

Expiry period (days)

Points expiry method

- Expire entire point balance if no earn or burn activity for the length of the expiry period
- Expire entire point balance if no earn activity for the length of the expiry period
- Expire any “unused” points where the earn date exceeds the expiry period

Loyalty transaction activity description

Save

To turn on rolling points expiry, for the ‘Points expiry method’, select ‘Expire any “unused” points when the earn date exceeds the expiry period’.

Once a point expiry method has been selected, the ability to change from a "Hard point expiry" rule to a "Rolling point expiry" rule will not be possible. The same applies when changing away from "Rolling point expiry" to "Hard point expiry" or "No point expiry".

The ability to change the expiry rule once set is disabled by default. If for any reason a Horizon administrator wants to enable changing expiry rules, this can be done via Settings > Account Settings > Loyalty & Rewards > Ability to change points expiry rules.

Points expiry smart inserts

New smart inserts that can be added to message content have been added as part of 3.11.

Smart insert name	Description
Points expiring in the next 7 days	How many points will be expiring within the next 7 days from the point the message is built
Points expiring in the next 30 days	How many points will be expiring within the next 30 days from the point the message is built
Points expiring in the next 90 days	How many points will be expiring within the next 90 days from the point the message is built

Control groups

This release sees the introduction of control groups. Control groups make it possible to exclude a specific set of contacts from broadcasts and promotions.

Creating a control group

A control group is created from a pre-existing group of more than 100 contacts. If the group has less than 100 contacts, creating a control group isn't possible.

Once you have created a group, when viewing the group in Contact Management > Groups, click the 'Create control group' icon to the right of the group.



Control group ✕

Control group name

Source group percentage

Ongoing?

Ongoing percentage

Create Control Group
Close »

Attribute	Description
Control group name	The name of the control group
Source group percentage	The percentage of the original group to use for the new control group
Ongoing?	If the 'Ongoing' setting should be enabled for the control group
Ongoing percentage	Determines the threshold new contacts joining the source group will be added to the control group

Excluding contacts from control groups

It's possible to ensure specific contacts aren't added to control groups. This setting can be found in the 'General' tab of a contact record.

General

Type of contact	<input type="text" value="Loyalty"/>
Status	<input type="text" value="Individual"/>
Title	<input type="text"/>
First name	<input type="text" value="John"/>
Last name	<input type="text" value="Smith"/>
Gender	<input type="text"/>
Date of birth	<input type="text"/>
Tenure Date	<input type="text"/>
Exclude from processing?	<input type="checkbox"/>
Exclude from control groups	<input type="checkbox"/>
Protected	<input type="checkbox"/>

Excluding control groups from triggered messages

If you have created a control group, when editing or creating a triggered message, there will be an option to exclude control groups from the triggered message.

Edit a triggered message

When creating a triggered message you can define an 'if' a 'what' and a 'when'. When those rules are met you can specify what existing message should be sent, or define a new message.

If...

Send message:*

When:

Exclude control group contacts from receiving?

Control groups in promotions

It's possible to add a control group to a promotion. This means that contacts in the control group will not be eligible for the promotion.

The selection of control groups can be found under the 'Eligibility' tab when creating a promotion.

Add fixed points promotion

General Outcome **Eligibility** Content Debug

Qualification rules ?

Application rules ?

Control group ?

Control group

Restriction rules ?

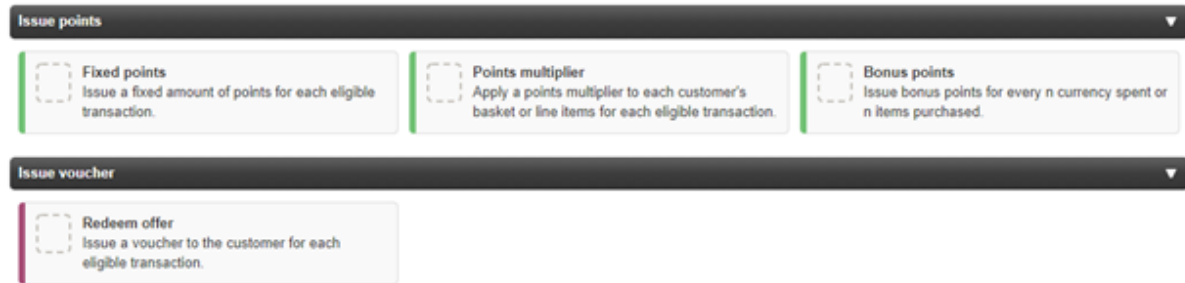
Promotion type: Issue voucher

A new promotion type will allow members to qualify for a personalised offer and issue a voucher when they make an eligible transaction.

When you go to add a promotion (Offer Management > Promotions > Add a promotion), you will see the option for 'Issue voucher'.

Add promotion

Select the type of promotion you'd like to create from the available options below.



Issue points

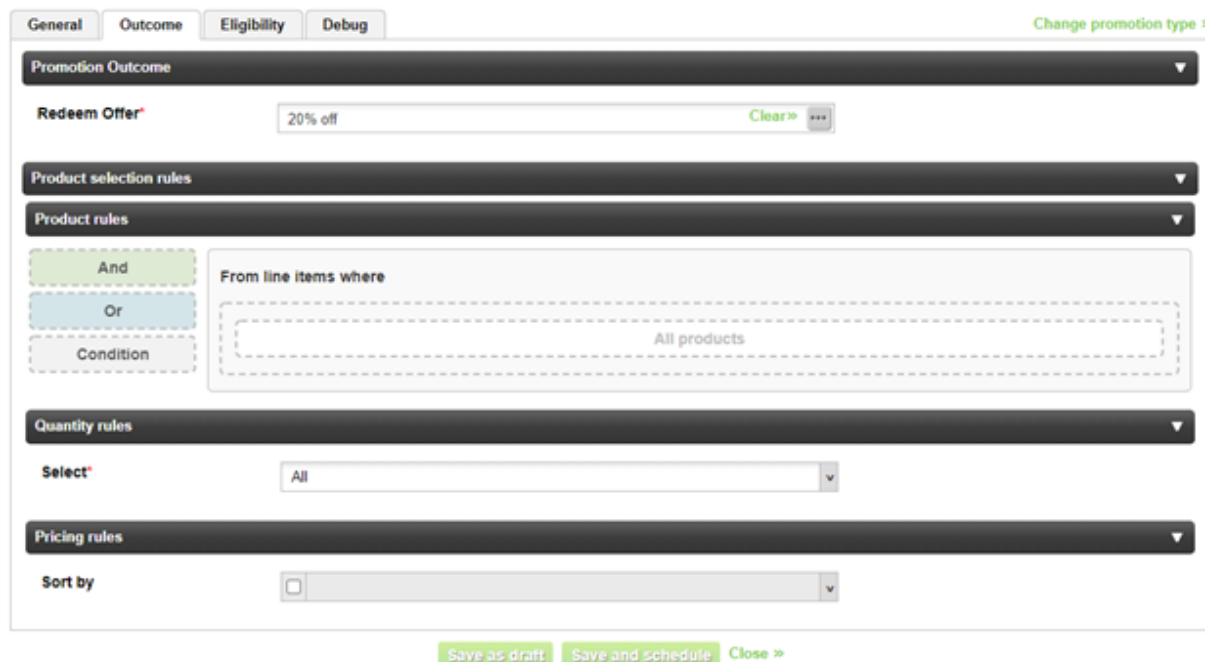
- Fixed points**
Issue a fixed amount of points for each eligible transaction.
- Points multiplier**
Apply a points multiplier to each customer's basket or line items for each eligible transaction.
- Bonus points**
Issue bonus points for every n currency spent or n items purchased.

Issue voucher

- Redeem offer**
Issue a voucher to the customer for each eligible transaction.

When creating an 'Issue voucher' promotion, the 'General' and 'Eligibility' tab are the same as when creating 'Issue points' promotions. However, the 'Outcome' tab has the addition of the 'Redeem Offer' field, which is where the offer can be added to the promotion.

Add redeem offer promotion



General Outcome Eligibility Debug Change promotion type

Promotion Outcome

Redeem Offer* 20% off Clear >>

Product selection rules

Product rules

And Or Condition

From line items where

All products

Quantity rules

Select* All

Pricing rules

Sort by

Save as draft Save and schedule Close >>

Improvements

The following are some key improvements that have been delivered with HTK Horizon 3.11;

- **Make the test profile eligible for Application rules in Promotion simulator:**
It's now possible to select an option which makes the test profile pass a promotion's Application rules in Promotion simulator
- **New contact search filters for broadcasts:** new search filters have been added to the 'Campaign activity' contact search filter group. This makes it possible to search for contacts who were sent a specific broadcast and within a particular time frame.

Fixed issues

The following summarises the key customer-affecting issues have been resolved in HTK Horizon 3.11:

Bug ref.	Description
BG-6234	We've fixed an issue where a contact redeemed an offer but the redemption didn't appear in the contact's promotion activity.
BG-6163	An issue where adding an unregistered card that contains transactions to a contact refreshes the contact's redemption limit.
BG-6188	An issue where variable content does not work via a redemption message in a promotion.
BG-6211	An issue where combining "Completed loyalty behaviour" and "Completed loyalty behaviour date" contact search filters doesn't work.