Platform Organization Best Practices

Before you dive in to all things Monetate, use these best practices to organize your company's experiences and actions in folders, use tagging and descriptions to more readily find what you need, and perform regularly scheduled maintenance on your account to make the platform easier to navigate and to keep your teams organized.

Using Folders to Organize Experiences

There are a number of different approaches you can take to organize experiences into folders on the Experiences list page. The following examples are just a few ways to get started:

- By page type
- By user or team
- By month
- By goal metric

Regardless of the approach you take with the folder structure, you can prioritize all experiences within each folder.

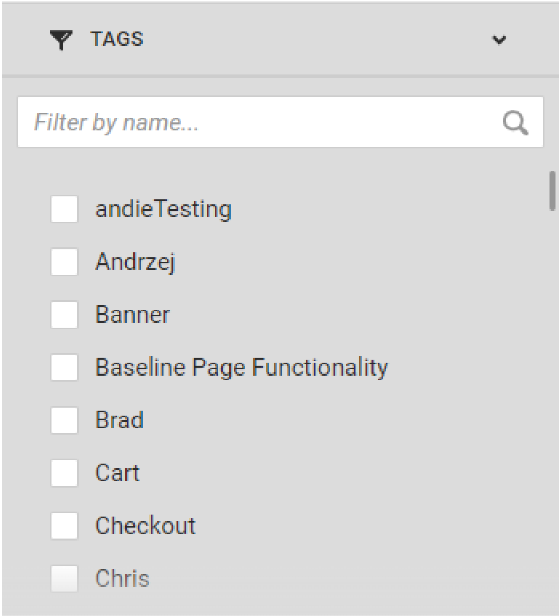
Using Tags to Provide At-a-Glance Context

Tags are a great way of adding at-a-glance context on the Experiences list page. They provide additional sorting and search options, and they help other users in the account quickly recognize which experiences are related to which goal initiative, which ones were created by which user, and more.

Use tags to indicate the following for each experience:

- Who created it
- What page it runs on
- When it was created
- Its selected primary goal metric
- The objective it aligns with from a program plan perspective

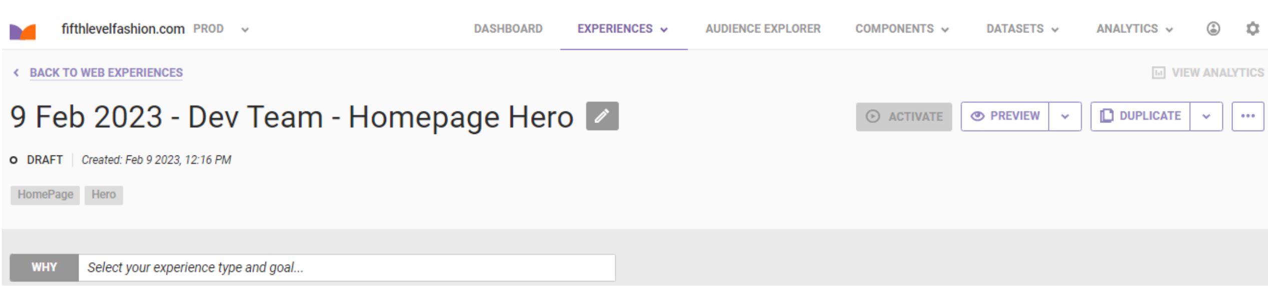
You can also use these tags to filter experiences from the left-hand panel on the Experiences list page.



Creating an Experience Naming Convention

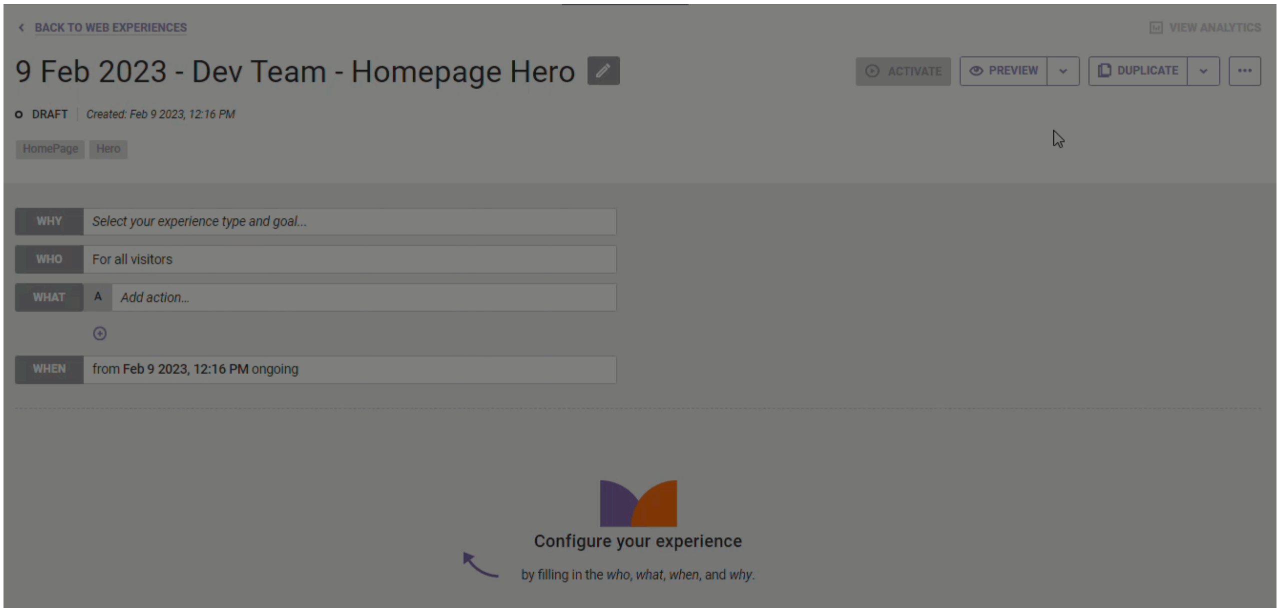
Use a templated structure for experience names so that certain details are consistently available at a glance on the Experiences list page. Consider a naming convention that provides such details as these:

- Date activated
- Business unit that created it
- Description
- Device type
- Split percentage



Adding Notes

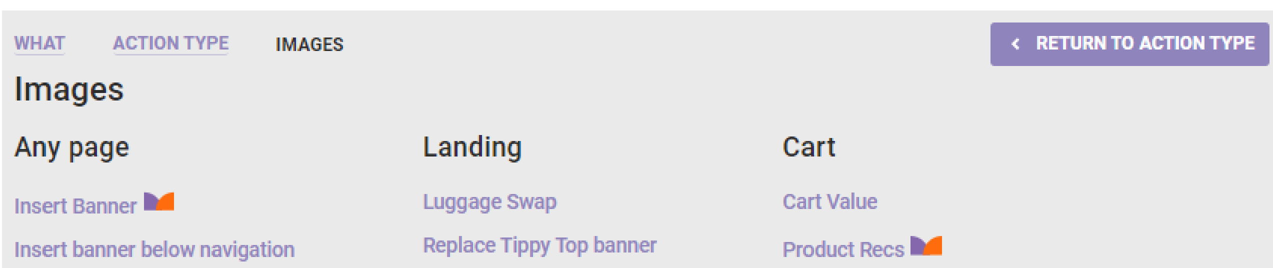
Use the Experience Notes modal to add descriptions, details, expectations, and other details to an experience.



Your team can add notes to explain the hypothesis of a test along with any internal notes and changes that you or someone else from your team made.

Using Page Types to Name Action Folders

When you're creating custom actions in Action Builder, organize those actions into folders for the page types on which they're intended to run. Ensure that you're consistent across action types.



Using the Description Field in Custom Targets and Events

When you create a custom target in Target Builder or a custom event in Event Builder, insert the element selector, HTML element, cookie name, or variable name you used into the description field so that you can reference it within the target when you add it to an experience.

Maintaining the Account Organization

Keep the Experiences list page tidy by archiving outdated or paused experiences. You can always bring them back from the **Archived** folder. If you run a lot of experiences, Monetate recommends doing this clean-up monthly or at least quarterly.