

Activate an Experience for Preview and Testing

You have multiple options for previewing an experience before you activate it to ensure the WHAT action or actions work as you expect. In some situations you must first activate the experience so that you can then test it, specifically to test certain types of WHO settings.



See [Preview Mode Limitations](#) for more information about the types of experience configurations that don't allow you to preview them before activating the experience.

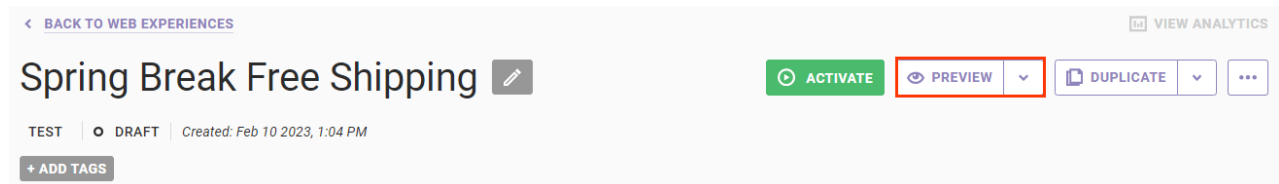
Previewing an Experience Before Activating It



Recent updates to Safari Intelligent Tracking Prevention (ITP) block third-party cookies on your website. This update means that Preview Mode and the [Monetate Inspector](#) browser plug-in may not work in Safari. Monetate has developed an alternative approach to delivering preview mode to the site. Clients must contact Support to have this option enabled for their account.

No workaround is available at this time for Monetate Inspector. Instead, use a different browser such as Chrome if you need to use the tool.

For most experience types, you can preview the experience before activating it. First, click **PREVIEW** at the top of Experience Editor.

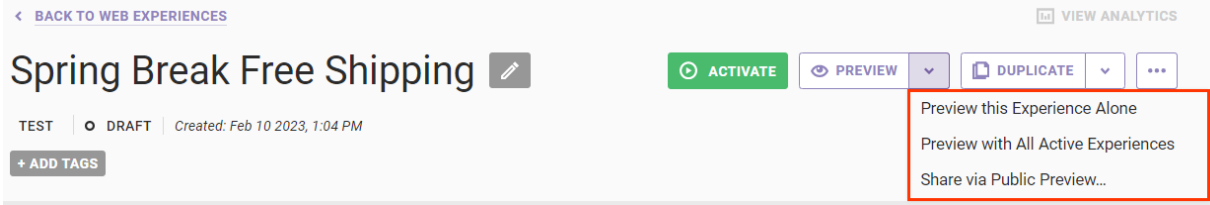


A new browser tab opens in which your site loads so that you can preview how the experience appears for site visitors.

Previewing an Experience with a Single Action

If the experience has only one action, then you can preview it a few different ways. First, click the drop-down arrow to the right of **PREVIEW**, and then select one of the options:

- **Preview this Experience Alone** – Provides the same functionality as clicking **PREVIEW**
- **Preview with All Active Experiences** – Launches a new browser tab that displays how your site looks with the experience you've built and all experiences that are currently active
- **Share via Public Preview** – Allows you to share a preview of the experience with other people at your company who may not have access to the Monetate platform using either a link or a QR code

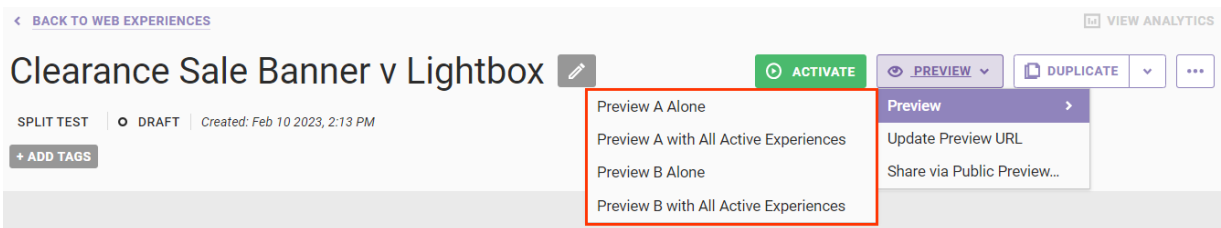


See [Sharing via Public Preview](#) section for more information about allowing people without access to the Monetate platform to preview the experience.

Previewing an Experience with Multiple Actions

The preview options are slightly different if the experience has multiple actions.

- **Preview A Alone** – Preview only action A in a new browser tab
- **Preview A with All Active Experiences** – Launches a new browser tab that displays how your site looks with the experience's action A along with all experiences that are currently active
- **Preview B Alone** – Preview only action B in a new browser tab
- **Preview B with All Active Experiences** – Launches a new browser tab that displays how your site looks with the experience's action B along with all experiences that are currently active
- **Update Preview URL** – Create a custom preview URL by entering the address for the specific page on your site where you like to direct the preview link
- **Share via Public Preview** – Allows you to share a preview of the experience with other people at your company who may not have access to the Monetate platform using either a link or a QR code

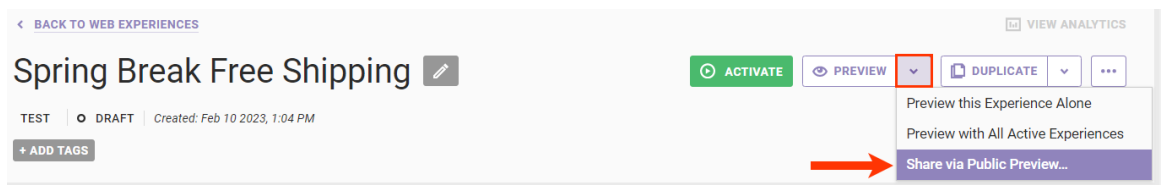


See [Sharing via Public Preview](#) in this documentation for more information about allowing people without access to the Monetate platform to preview the experience.

Sharing via Public Preview

Follow these steps to create a link or QR code that you can share so that other people within your company can preview an experience.


1. Click the arrow to the right of **PREVIEW** and then select **Share via Public Preview**.



2. In the Share via Public Preview Link/QR Code modal, select from **Preview Group** which variant you want previewed if the experience has variants. If the experience doesn't have variants, skip this step.

Share via Public Preview Link / QR Code ✕

Preview Group

A ▼ 

- A experiences
- B
- Control
- Spring Break Free Shipping

Preview Landing Page URL

<https://www.fifthlevelfashion.com>


CREATE PREVIEW LINK / QR CODE **CANCEL**

3. Click to select **Preview Against All Active Experiences** if you want the preview to include all other active experiences running on the page.

Share via Public Preview Link / QR Code ✕

Preview Group

A ▼

Preview Against All Active Experiences 

Description (to include in link)

Spring Break Free Shipping—Var A with All Experiences

Preview Landing Page URL

<https://www.fifthlevelfashion.com>

CREATE PREVIEW LINK / QR CODE **CANCEL**

4. Revise the text that appears in **Description (to include in link)** as necessary. If the preview you're sharing is a variant or is a variant with all other active experiences, consider including that information in the description.

Share via Public Preview Link / QR Code ✕

Preview Group

A ▾

Preview Against All Active Experiences

Description (to include in link)

Spring Break Free Shipping—Var A with All Experiences

Preview Landing Page URL

<https://www.fifthlevelfashion.com>

CREATE PREVIEW LINK / QR CODE **CANCEL**

5. Paste into **Preview Landing Page URL** the URL for a specific page on which anyone who clicks the link can preview the experience.

Share via Public Preview Link / QR Code ✕

Preview Group

A ▾

Preview Against All Active Experiences

Description (to include in link)

Spring Break Free Shipping—Var A with All Experiences

Preview Landing Page URL

<https://www.fifthlevelfashion.com>

CREATE PREVIEW LINK / QR CODE **CANCEL**

6. Click **CREATE PREVIEW LINK/QR CODE**.


Share via Public Preview Link / QR Code ✕

Preview Group
A ▾

Preview Against All Active Experiences

Description (to include in link)


Preview Landing Page URL



7. Click **COPY URL** to copy the preview link onto your device's clipboard to paste and then send to the recipients in the communications application of your choice. Alternately, scan the QR code to preview the experience on a mobile device.

Preview Link / QR Code ✕

Preview URL:
<https://marketer.monetate.net/control/preview/3809/5XAKGWU6AXTHVWSMMQ1VCP8UXB0NXAW7/spring-break-free-shippingvar-a-with-all-experiences>



SCAN TO VIEW ON A DIFFERENT DEVICE

8. Click **DONE** to dismiss the modal and return to the Experience Editor page.

Repeat these steps as necessary to create previews of each variant if the experience has multiple variants.

Testing an Experience After Activating It

Experiences with certain types of configurations require that you activate them before you can test them.



The experience is not in Preview Mode when you use this method.

By adding an IP address or initial URL query string WHO target to the experience allows you to test it when activated and ensuring that only you can see the changes.

You must activate an experience to test it if it contains any of the following:

- A WHO Behavior target that relies on cart information, such as **Abandoned cart**, **Amount in cart**, or **Product in cart**
- The **Landing page match** WHO target
- A WHO custom target
- Actions that include dynamic text
- An action condition that uses any one of the four **Cart value** options
- An action condition that uses the **Is landing page** or the **Is not landing page** option
- Recommendations actions that use a recommendation strategy configured with a collaborative [recommendation algorithm](#), such as Purchased and Also Purchased, Viewed and Also Viewed, and Viewed and Later Purchased



An experience that uses a WHO custom target requires a period of live caching before you can test it.

Using an IP Address WHO Target

Follow these steps to add an IP address WHO target to an experience to test it once activated.

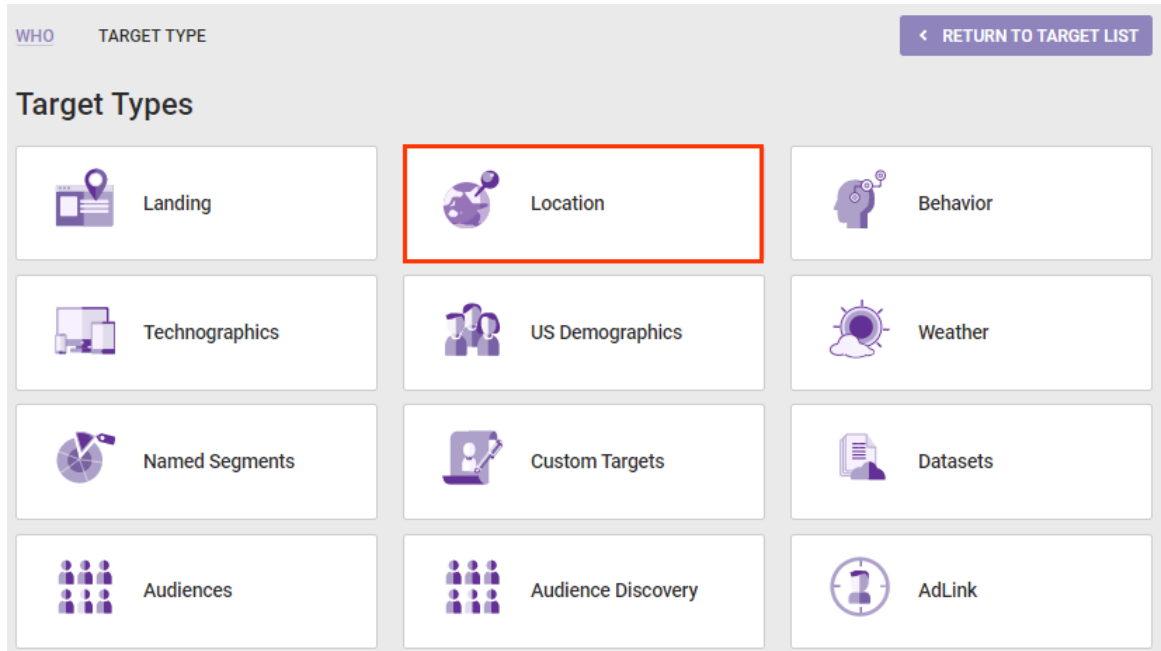
1. If you don't already have it open, navigate to the experience and open it in Experience Editor.
2. Click **WHO** and then click **ADD TARGET**.

The screenshot shows the Experience Editor interface with the following configuration:

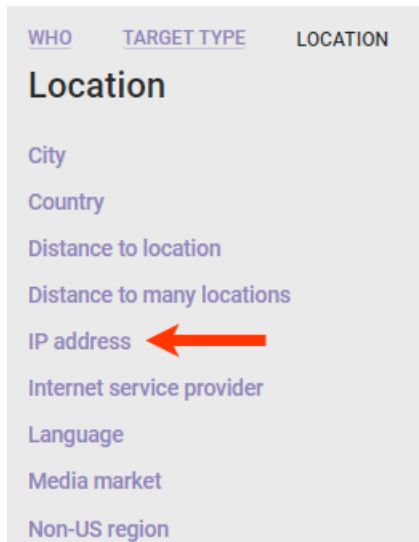
- WHY:** to measure Revenue per session versus control
- WHO:** For all visitors (highlighted with a red box)
- WHAT:** A show Basic Lightbox (50%)
- Control (50%)
- Traffic allocation:** EVEN ALLOCATION
- WHEN:** from Feb 11 2023, 12:00 PM to Feb 14 2023, 11:59 PM

At the bottom right, there is a red arrow pointing to a green button labeled **ADD TARGET**.

3. Click **Location**.



4. Click **IP address**.



5. Enter your IP address in the appropriate field, keep **visitors matching this target** set to **INCLUDE**, and then click **SAVE**.

WHO TARGET TYPE LOCATION IP ADDRESS [RETURN TO SELECT TARGET](#)

IP Address

Triggers an experience when a site visitor's IP address matches one of the target IP addresses.

IP Address

INCLUDE III visitors matching this target.

SAVE CANCEL

6. Click **ACTIVATE** on the Experience Editor page.

Once you test the experience, you must remove the IP address target. Otherwise, only visitors with that IP address can view the experience.

Using an Initial URL Query String Match

1. If you don't already have it open, navigate to the experience and open it in Experience Editor.
2. Click **WHO** and then click **ADD TARGET**.

WHY to measure Revenue per session versus control

WHO For all visitors

WHAT A show Basic Lightbox 50%

- Control 50%

Traffic allocation: EVEN ALLOCATION

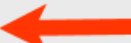
WHEN from Feb 11 2023, 12:00 PM to Feb 14 2023, 11:59 PM

WHO [ADD TARGET](#)

3. Click **Landing** on the Target Type panel, and then click **Initial URL query string**.

WHO TARGET TYPE LANDING < RETURN TO TARGET TYPE

Landing

- Custom variable visitors
- Custom variable visitors with multiple values
- Direct navigation visitors
- Initial URL query string 
- Landing page match
- New visitors
- Referrer
- Returning visitors
- Search terms
- Visitors familiar with site
- Visitors who search for the site

4. Enter the query string name and the matching value into their respective fields. Keep **visitors matching this target** set to **INCLUDE**.

WHO TARGET TYPE LANDING INITIAL URL QUERY STRING < RETURN TO SELECT TARGET


Initial URL query string

Triggers an experience when a site visitor's landing page contains the defined query parameter.

Query string name
FreeShippingOfferTest

Matches value
yes

A list of matches, separated by commas

INCLUDE  visitors matching this target.

SAVE CANCEL

5. Click **SAVE**.

WHO TARGET TYPE LANDING INITIAL URL QUERY STRING [RETURN TO SELECT TARGET](#)

Initial URL query string

Triggers an experience when a site visitor's landing page contains the defined query parameter.

Query string name

Matches value

A list of matches, separated by commas

INCLUDE visitors matching this target.

6. Click **ACTIVATE** on the Experience Editor page.

Once you activate the experience, clear your browser's cookies and cache. Navigate to your website and append its URL with the query parameter you defined in the WHO target. For the experience shown in the screenshots, the URL would be as follows:

`http://www.example.com/?FreeShippingOfferTest=yes`

Once you test the experience, you must remove the initial query string match target. Otherwise, no visitors can view the experience.