THIS FORTNIGHT IN ECOMMERCE AI

Test your Black Friday discount first

Plus: a do-it-yourself incrementality test for PMax, and a look at what Google's AI will write in your ads.

Issue #03 · 13 October 2026 · 9 min read

Black Friday is 45 days away. Do you know whether the discount you're planning will make you money, or just make you busy?

EcomifyAI tracks one shift: ad and commerce platforms are moving decisions from you to their own AI. Issue #01 showed Google's bidding starting to obey your targets literally; Issue #02 showed AI agents shopping Shopify stores, with checkout switched on by default. This fortnight the pattern turned. With Google's AI Max migration window closed on 30 September and Q4 budgets being set now, the platforms shipped tools for checking the machine's work: discount experiments in Shopify, self-serve lift tests for Google Search and Performance Max, and previews of the ad copy Google's AI will write. For your next quarter, that makes the coming three weeks the last clean window to test anything before peak traffic distorts every result.

IN THIS ISSUE

1. **The Signal: Shopify discount experiments.** Test a Black Friday offer on a share of traffic before you commit. Matters most to Shopify brands on the Grow plan or higher.
2. **Google Conversion Lift for Search and PMax.** A holdout test of whether your ads create sales or claim them. Matters most to anyone spending heavily on Performance Max.
3. **AI Max copy previews.** See sample AI-written headlines before they run. Matters most to brands whose Search campaigns were migrated in September.
4. **TikTok's in-app checkout test.** Buy Direct and Shopping Assistant, by invitation. Matters most to US-selling brands already spending on TikTok.
5. **Quick hits.** Google automated promotions, Muse for Small Business, a reported AI Mode offer format, and text over your Demand Gen videos.

UPDATES FROM PREVIOUS ISSUES

- **Agentic checkout settings (Issue #02).** We told North American sellers to open Sales channels › Agentic › Meta. Shopify's help page is more precise: you first switch off "Allow Shopify to manage for me", then open **Meta AI and Muse**. Google works the same way: direct checkout in Google AI Mode and Gemini is also on by default for eligible US-based stores selling to US customers, in the same menu. Make both calls together.
- **Google's September spam update (Issue #02 thread).** It finished rolling out on 8 October. If organic traffic moved between 24 September and 8 October, that is the window to investigate.

THE SIGNAL

You can now test a Black Friday discount before you commit to it

WHAT CHANGED

On 2 October, Shopify added discounts to Rollouts, its built-in scheduling and A/B testing tool. You can show an offer to a portion of online store traffic and compare it against your existing offers on conversion, or schedule it to launch alongside theme and checkout changes. The developer changelog flagged it as action required for apps that read discounts.

WHY THEY DID IT

Shopify says the aim is coordinated campaigns and testing offers before launching them more broadly.

> *Our read: discount depth is the biggest single margin decision most brands make in Q4, and until now Shopify left that test to third-party apps.*

HOW IT WORKS

Go to Markets › Rollouts. Scheduling is on Basic and above; Experiments, which split traffic into control and treatment, need the Grow plan or higher, and market-specific targeting needs Advanced or Plus. The control keeps your standard discounts; the treatment gets the new offer. Experiments run on the online store only. Shopify's documentation sets no regional limit, so EU and UK merchants have it.

WHAT IT GETS YOU

A read on whether an offer moves conversion, add-to-cart and reached-checkout rates on your own traffic, with no extra app or duplicate theme, plus the option to launch a Black Friday offer and theme together and roll both back automatically.

THE KNOCK-ON EFFECTS

- *Conversion is not profit.* Shopify's analytics page says discount-specific metrics, including revenue attributed to the discount, "aren't available". A deeper discount usually wins on conversion, so do the margin maths yourself: at gross margin m and discount d, conversion must rise by $d \div (m - d)$ to hold gross profit per visitor, assuming basket size holds. At a 60% margin, 10% off needs a 20% lift; 20% off needs 50%.
- *If you advertise the offer,* stop. Tests don't reach your ads or feeds, and Shopify warns that Google and Meta can delist products or suspend accounts over mismatched offers.
- *If you use codes,* test with automatic discounts instead; Shopify notes codes can be shared beyond the test group.
- *If an app displays or syncs your discounts,* ask the vendor whether it reads Shopify's 2026-10 API. On older versions, discounts that don't reach every buyer are filtered out.
- *If you sell via Meta or Google direct checkout,* those agent orders sit outside the test, because experiments apply only to the online store.
- *If you sell into the EU,* ask your advisor how a split-tested discount fits price-reduction display rules. This is not legal advice.

> *Our read: an October test tells you which offer pulls harder, not what Black Friday demand will be.*

TRY THIS

This week, create an Experiment in Markets › Rollouts with your candidate Black Friday offer as an automatic discount, split 50/50, on products you aren't advertising with a price-specific message. Run it for at least two full weeks and finish by 10 November. It worked if the treatment's conversion lift beats your break-even lift. If it wins on orders but misses break-even, the deeper discount loses money on every visitor.

DEEP DIVE

Google will now let you check whether Performance Max is earning its credit

WHAT CHANGED

Google's Conversion Lift setup page now says budgets above $5,000 and 1,000 conversions unlock directional lift results. Search Engine Roundtable reported on 8 October that Search and PMax studies are now self-serve, where they previously needed a Google rep. One caution: the same Google page, as we read it on 12 October, still tells Search and PMax advertisers to contact their rep, so treat self-serve as rolling out.

WHY THEY DID IT

Google describes the tool as measuring conversions "directly driven by your ad".

> *Our read: having pushed Search into AI Max and budgets into PMax, Google needs advertisers to trust the black box before Q4, and a causal test you can run yourself is its strongest argument.*

HOW IT WORKS

Goals › Measurements › Lift measurement › + › Conversion Lift › Based on users. A holdout of 1–50% of users sees none of the measured ads, and Google compares conversions between groups. Google recommends 14 days or more and 90% certainty, with budget guidance below that; a campaign can be in one study at a time. The docs set no country exclusion and recommend consent mode for EEA traffic, so EU and UK advertisers can use it where their account has access.

WHAT IT GETS YOU

Incremental conversions, incremental CPA and incremental ROAS: the numbers your in-platform ROAS column can't give you.

THE KNOCK-ON EFFECTS

The holdout costs sales, so run it now rather than over Black Friday weekend. Google advises against changing creative or audiences mid-study, so don't run creative tests on the same campaigns.

> *Our read: if your PMax spends heavily on brand searches or returning customers, expect incremental ROAS well below reported ROAS.*

TRY THIS

Run it on your largest PMax campaign with the tool's recommended holdback, starting by 20 October, with study power at 90% or more before launch. At the end, divide incremental ROAS by in-platform ROAS: that ratio is the discount to apply to the campaign's reported ROAS in your Q4 plan.

DEEP DIVE

See what Google's AI will write in your Search ads before it runs

WHAT CHANGED

Google has added text customisation asset previews to AI Max for Search, reported on 9 October. Enter a final URL and Google generates up to 10 sample headlines and descriptions, mostly in under 30 seconds, without you opting in to text customisation.

WHY THEY DID IT

Google's stated purpose is checking whether generated text fits your brand and text guidelines before you opt in.

> *Our read: having auto-upgraded these campaigns to AI Max in September, Google is answering the brand-safety objection.*

HOW IT WORKS

It sits in the Asset optimization section when you create or edit an AI Max campaign. If you're in Google's text guidelines pilot, excluded words and themes filter the preview. Supported languages include English, French, German, Spanish, Italian, Dutch and Portuguese, so EU and UK advertisers have it. Adult content is excluded.

WHAT IT GETS YOU

A pre-flight look at the copy Google will build from your landing page. For text customisation itself, Google claims better performance, relevance and productivity, without giving figures.

THE KNOCK-ON EFFECTS

The preview is a sample, not the live pool. Google regenerates assets at least every 48 hours from your landing page, domain, ads and keywords, and serves them when it predicts they'll beat yours. Your landing page copy is now ad copy, Black Friday banners included. If you sell supplements or other regulated products, a claim that works in context can read differently as a standalone headline; check with your advisor (not legal advice).

TRY THIS

For each migrated campaign, preview your top landing page and your planned Black Friday landing page. Fix the page or untick Text customization where you'd reject the copy (Final URL expansion requires it). It worked if the preview shows nothing you'd reject; then check the "Added by" column weekly through November.

DEEP DIVE

TikTok joins the in-app checkout race, as an invitation-only test

WHAT CHANGED

At Advertising Week New York on 5 October, TikTok announced Buy Direct, a one-click in-app checkout from the For You feed, and Shopping Assistant, a chat agent that answers product, sizing and shipping questions. Partners include Salesforce, Shopify and Stripe. GMV Max, its TikTok Shop ad product, will factor affiliate commissions, coupons and referral fees into its optimisation.

WHY THEY DID IT

TikTok says interest fades when shoppers leave to hunt for details, and checkout friction causes abandonment.

HOW IT WORKS

Shopping Assistant answers from information the merchant provides, then hands off to the merchant's checkout inside TikTok's in-app browser. Buy Direct uses stored payment details and addresses, requires an integration with the Universal Commerce Protocol, and the brand stays merchant of record. Both are available only through eligibility-based testing via your TikTok sales partner. TikTok doesn't say whether EU or UK merchants qualify. The GMV Max change applies to TikTok Shop only and has no date.

WHAT IT GETS YOU

Fewer steps between video and payment. TikTok says brands see better conversion rates but gives no figure.

THE KNOCK-ON EFFECTS

This is the third platform, after Meta and Google, offering in-platform checkout where you stay merchant of record. On Shopify's Meta and Google channels, browser pixels don't fire and subscriptions and bundles aren't supported.

> *Our read: assume similar gaps on TikTok, so pixel-based attribution will under-count it. If you sell on TikTok Shop with heavy affiliate use, net-cost bidding could move spend away from affiliate-driven products once it ships.*

TRY THIS

If you sell into the US and already spend on TikTok, ask your rep about eligibility, and get written answers to three questions first: how Buy Direct orders appear in your Shopify order source, which pixels fire, and how returns are routed. If you sell mainly in the EU, there's nothing to do yet.

QUICK HITS

- **Google switched on automated promotions yesterday.** From 12 October, Google may pull coupons and deals from your site into Search and PMax campaigns that have linked location assets and no promotion assets of their own, per Google's email. If that's you, check your pages for subscriber-only or expired codes, or switch it off under Assets › three-dot menu › Account-level automated assets.
- **Muse comes for the back office.** Meta's Muse for Small Business (29 September) connects to Shopify, Klaviyo, Stripe, QuickBooks and Meta ad accounts. Meta says nothing publishes, sends or spends without your approval. US and Canada only.
- **Google is reportedly testing a "Direct offer" asset** that shows a "Claim one-time code" bar under sponsored results in AI Mode, drawing on a CSV of single-use codes and serving only on AI Max or text customisation campaigns, per PPC News Feed. Google hasn't published a page on it yet.
- **Demand Gen may be adding text over your videos.** PPC News Feed reports a new "Overlay on videos" setting that appears to be on by default, and that ads using these optimised assets are labelled as AI-edited in the EU. Check Asset optimization in your Demand Gen campaigns.

ONE THING TO DO THIS FORTNIGHT

Put your planned Black Friday offer into a Shopify Rollouts Experiment this week, and judge it against the break-even lift for your margin, not against the control's conversion rate. If the test can't clear break-even in October, it won't on 27 November either.

That's the fortnight. I'd like to know what discount depth you're planning for Black Friday, and whether you've ever tested it against a shallower one. Reply and tell me; I read every reply, and the answers will shape what we test in the next issue.

P.S. If a colleague is setting Q4 budgets this month, they can get EcomifyAI free every fortnight at ecomifyai.ie.

Read every issue free at ecomifyai.ie — the operator's filter on ecommerce AI. Independent brand; no sponsored content; affiliate links clearly marked. Figures and claims are drawn from the linked primary sources at the time of writing and should be verified before you act on them; nothing here is legal, financial or professional advice.

SOURCES

Every claim in this issue links to one of these. Click any URL to open it.

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