

# Optimizely CMS and Commerce Connect Service Description

Updated: September 19, 2024

## 1. Overview

CMS and Commerce Connect services include a multi-lingual enterprise search & navigation engine, a delivery network, web application firewall and managed services. The service varies by various usage parameters and includes at least one Service Instance serving one codebase in one Region, that can be deployed across several Environments for various deployment stages.

### 1.1 CMS tiers

The fees of the CMS tiers are mainly driven by the amount of traffic generated. These plans are suitable for delivering digital experiences, for example: lead generation websites, brand & informational websites, intranets & extranets, customer service tools, or e-commerce sites that use custom or third-party commerce capabilities.

### 1.2 Commerce Connect tiers

Built on the CMS capabilities, Commerce Connect tiers add catalog management and optionally, cart, pricing, transactional, order management and promotional capabilities. These are utilized by Retailers, Manufacturers, Nonprofit organizations and B2B companies.

## 2. Definitions

### 2.1 Application Environment

The Application Environment is all the infrastructure and components required to serve up sites from one CMS or Commerce Connect codebase. The architecture of an Application Environment is covered in more detail in Section 4. All usage metrics and quality metrics (SLA) from use of the site(s) will be tallied against the usage and quality metrics of the Subscription. PPY, OPV (if applicable), SKUs (if applicable), and Transactional Emails will be measured in aggregate towards Usage Terms and Rights and Overage Terms and Price across the Subscription holding the Application Environment. An Application Environment may be scaled down, suspended or deprovisioned when it is not being actively used.

## 2.2 Deployment Stage

A Deployment Stage is a step in the deployment process that ensure governance and segregation of duties are met as defined in the [Roles and Responsibilities Matrix](#), thus helping ensure the SLA. Each Deployment Stage consists of an Application Environment.

Subscriptions default Deployment Stages are Integration, Preproduction, and Production, and are described in detail in Section 3.7 *Deployment Stages*.

In the case the default Deployment Stages are sidestepped by using e.g., Deployment API, any issues and incidents affecting SLA related to not following the default stages is within the customer's responsibility.

## 2.3 Subscription

A Subscription as defined in the Order Form refers to a collection of at least one (1) Service Instance(s). All usage metrics and quality metrics (SLA) from use of the Service Instance(s) will be tallied against the usage and quality metrics of the Subscription specified in the Order Form. PPY and OPV (if applicable) will be measured in aggregate towards Usage Terms and Rights and Overage Terms and Price across the Service Instances purchased by Customer.

## 2.4 Usage and Overage Terms

Usage terms and rights are the maximum usage rights Customer shall be provided, measured, and charged by Optimizely within a Contract Year before Overage Terms and Price apply. These are measured at the Subscription, Service Instance or Application Environment and can be billed at an additional cost.

Overage terms and price are the incremental increase of usage rights, parameters and pricing Customer shall be provided by Optimizely on a monthly or Contract Year basis after exceeding the Usage Terms and Rights of the Subscription.

All terms are described in <https://www.optimizely.com/legal/product-supplement/Metrics-and-basic-items>.

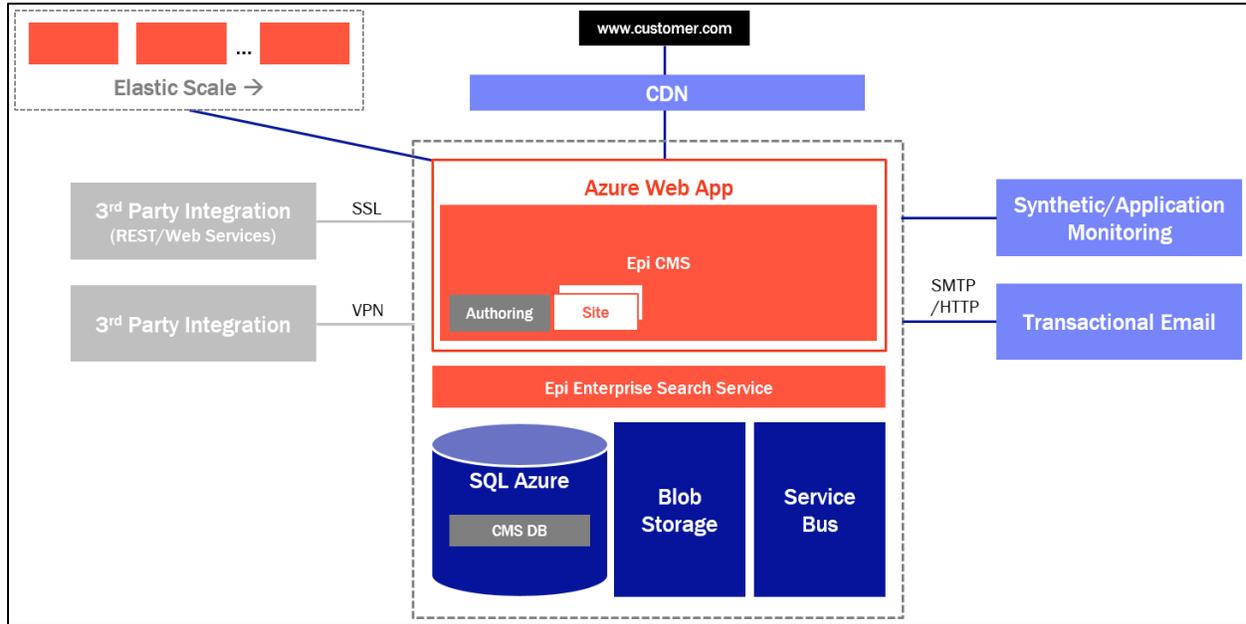
# 3. Consumption Metrics

All terms are described in <https://www.optimizely.com/legal/product-supplement/Metrics-and-basic-items>.

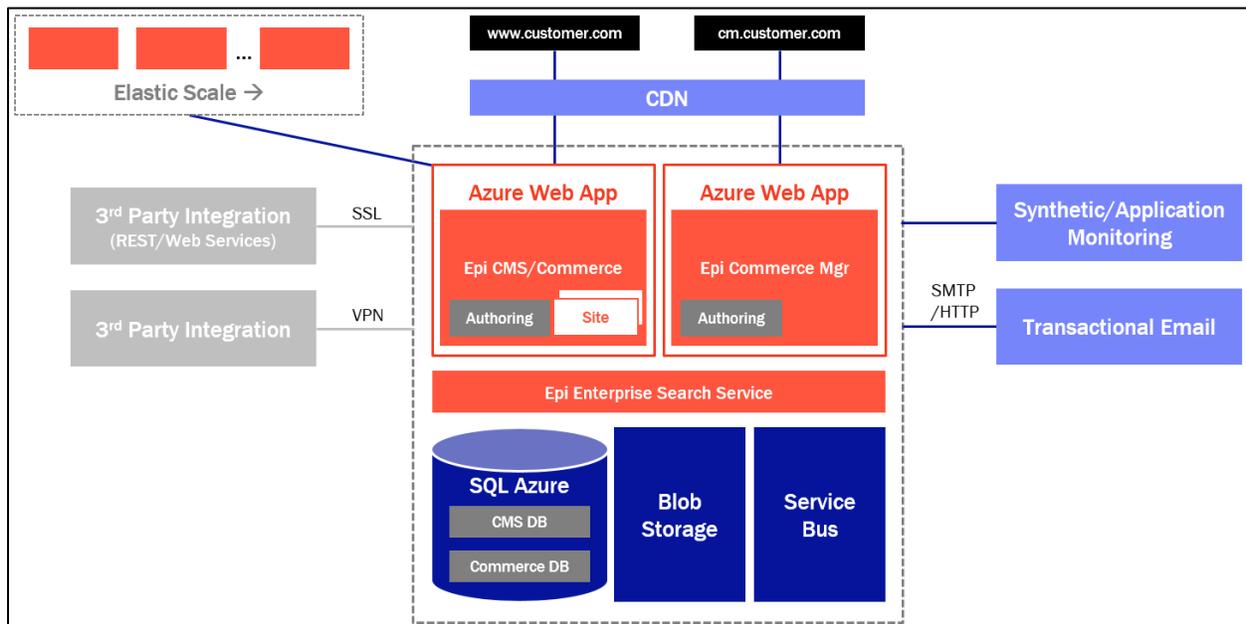
# 4. Architecture Overview

More detailed information that describes [the architecture of the Optimizely platform](#), along with an introduction to the system foundation and related components and products, is available in the [Technical Overview](#) topic on Optimizely World for additional information.

### 4.1 CMS Service Instance



### 4.2 Commerce Connect Service Instance



## 5. Infrastructure

The infrastructure layer for these services is based on third party providers, Microsoft™ cloud architecture and Microsoft Azure™, it is purpose-built for Optimizely with a limited set of Azure services available. Optimizely Search & Navigation runs on Microsoft Azure in full-service regions.

### 5.1 Third-Party Platform Providers

The following third-party providers to provide certain infrastructure or components, and those may require the user to adhere to terms and conditions as well.

### 5.2 Cloudflare™ CDN

<https://www.cloudflare.com/terms>

### 5.3 Microsoft Azure™

<https://www.microsoft.com/en-us/licensing/product-licensing/products.aspx>

## 6. Regional Data Centers

When setting up a Service Instance, customers can choose from one of the following locations (in bold):

GEOGRAPHY	REGION	REGION PAIR	SEARCH & NAVIGATION	AUTOMATIC FAILOVER region (add-on)
Asia-Pacific	<b>Southeast Asia</b> (Singapore)	East Asia	Southeast Asia	East Asia
Australia	<b>Australia East</b> (New South Wales)	Australia Southeast	Australia East	Australia Southeast
Australia	<b>Australia Southeast</b> (Victoria)	Australia East	Australia East	Australia East
Europe	<b>North Europe</b> (Ireland)	West Europe	North Europe	West Europe
Europe	<b>UK South</b> (London)	UK West	UK South	UK West
Europe	<b>West Europe</b> (Netherlands)	North Europe	North Europe	North Europe

North America	<b>Canada Central</b> (Toronto)	Canada East	Canada East	Canada East
North America	<b>Canada East</b> (Quebec City)	Canada Central	Canada East	Canada Central
North America	<b>Central US</b> (Iowa)	East US 2	East US	East US 2
North America	<b>East US</b> (Virginia)	West US	East US	West US
North America	<b>East US 2</b> (Virginia)	Central US	East US	Central US
North America	<b>West US</b> (California)	East US	West US	East US
Norway	<b>Norway East</b> (Oslo)	Norway West	North Europe	(Not available)
Middle East	<b>United Arab Emirates North</b> (Dubai)	UAE Central	Southeast Asia	(Not available)
Sweden	<b>Sweden Central</b> (Gävle)	Sweden South	Sweden Central	(Not available)

Paired data centers are geographically adjacent to the primary data center [as defined by Azure](#), and automatically assigned based on the primary Region chosen during the configuration process.

**Note:** Additional Service Instances may be deployed to other Regions beyond the one selected for the initial Service Instance.

## 7. Lifecycle Management

### 7.1 Deployment Stages

All Service Instances i.e., a deployment process with one or more Deployment Stages. The deployment process can be extended with Additional Application Environments for an additional cost. Additional Application Environments can only be used as described in the Section 10.2.

Deployments Stages are typically used as follows.

### 7.1.1 Integration Stage

Customers deploy the full solution, as daily builds, or continuous releases. Here customers can validate initial integrations with external systems, perform functional testing, and add initial content in the case of a [first-time deployment](#). The integration environment has fixed configuration and no automatic scaling. Customer can deploy updates to Integration yourself, see the [Deploying](#) topic on Optimizely World.

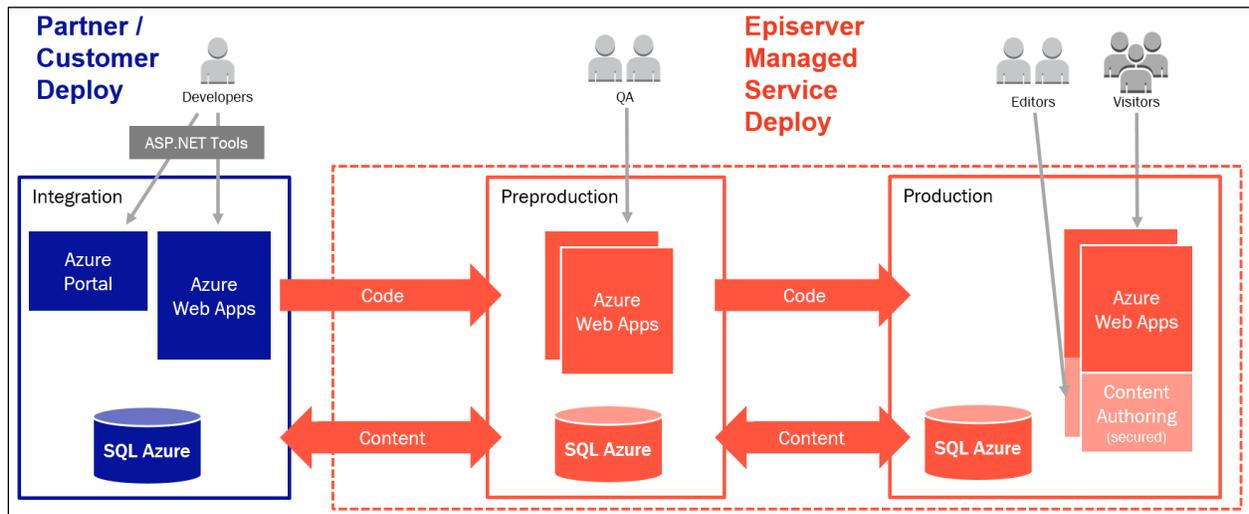
### 7.1.2 Preproduction Stage

Optimizely uses this stage to test Production deployment and verify performance and operational functionality. Customers may also use for UAT, load testing, or approved penetration testing. Preproduction scales automatically, and deployment is done by Optimizely or by Customer using the service management portal. Content in this environment is not backed up and may be overwritten during deployments and upgrades.

### 7.1.3 Production Stage

The Production Stage governs changes to the live Production environment. In Production website users will perform authoring of content, using for example the Optimizely content publishing flow or Projects, and website visitors can access public content. Production scales automatically, and deployment is done by Customer or Optimizely.

## 7.2 Updates, Upgrades and Deployment



### 7.2.1 Product Updates and Upgrades

Optimizely follows a continuous release cycle with new releases typically available every 1-2 weeks. Releases include both new features and fixes. Customers choose when to apply upgrades, The Customer is responsible for obtaining and installing software updates and upgrades to the Optimizely product through the [default deployment](#) approach.

## 7.2.2 Code Deployment

Standard deployment automation tools such as Octopus Deploy and Visual Studio Team Services are recommended for environments in the deployment pipeline prior to pre-production. See the <http://world.episerver.com/digital-experience-cloud-service/deploying-Platform-Service-Deployment> topic on Optimizely World for additional information.

## 7.2.3 Self-service Deployment

Customer can deploy changes directly to the Management Portal instead of sending a ticket to the Service Desk. Using Self-service Deployment, Customer does not need to schedule deployments in advance, but can deploy immediately when required and perform related tasks such as CDN purging etc. Access to Self-service deployment can be requested on [Optimizely World](#).

## 7.2.4 Deployment API

Customers with access to Self-Service Deployment can integrate against the API instead of sending a ticket to the Service Desk or using Self-Service Deployment. Using Deployment API gives the customer an option to sidestep the default deployment stages at their own risk. Access to Deployment API can be managed in the DXC Management Portal.

# 8. Developer Guidelines

See the [Optimizely Digital Experience Platform Service](#) topic on Optimizely World for information on working with the services.

## 8.1 Developer License(s)

Customers may require Optimizely development license(s) to be used in conjunction with Digital Experience Platform, with Customers in good standing. Use of Optimizely developer license(s) requires customers to accept and adhere to the Optimizely EULA, which can be found here – <https://www.optimizely.com/legal/end-user-licence-agreement>. Optimizely development license(s) and use thereof does not qualify for any support under the SLA.

**NOTE:** The definition of a "Development License(s)" - a limited License Type that can only be used for non-commercial purpose(s). They cannot be used for any public site or server and are typically labeled as, but not limited to, "Partner", "Developer", "Demo", "Demonstration" or "Evaluation" license(s). Customers may install development License(s) in machine-readable code form on non-public facing physical developer computer(s) or on non-public facing virtual developer instance in a virtual operating system environment for non-production, non-commercial Use in a non-Server environment for a single named user and development

purposes only. Development License(s) are not subject to a fee under these conditions but are limited to a maximum of one (1) year. For additional clarity, should a Customer install a Development License on any server (regardless of if considered a “production” or “non-production” server), or on any computer which is accessed by more than one individual at a single time, that is a violation of the EULA. These examples and use cases require the Customer to purchase a full Optimizely Server or Instance-bound license(s). Non-production servers (typically labeled as, but not limited to “QAT”, “CAT”, “Integration”, “Development”, “Fail-over”, “Emergency”, “Testing”) all require full licenses for Optimizely Server or Instance-bound.

## 8.2 Search & Navigation Developer Index(es)

A Service Instance may include a Search & Navigation Software Service Developer Index, when used together with Developer License(s) for on-premises development of the codebase for a Service Instance.

## 8.3 Content Graph Developer Instance(s)

A Service Instance may include a Content Graph Developer Instance, when used together with Developer License(s) for on-premises development of the codebase for a Service Instance.

# 9. Service Requirements

The CMS and Commerce Connect services are built on a framework of Optimizely and Microsoft Azure technologies. Any software that customers deploy must work within the framework outline in the [Optimizely DXP Requirements](#) topic on Optimizely World for product requirements.

## 9.1 Supported Versions of Optimizely

See the [Optimizely DXP Requirements](#) topic on Optimizely World for required software versions.

Optimizely will continue to provide fix, and web security software updates as well as product developer support on the then-current released version of Content Management System (CMS) and one version prior.

Major versions of CMS will distinguish between feature and security updates. Optimizely may choose to fix critical security issues in earlier versions of CMS. All new feature development applies only to the most recent version. Each release version is cumulative and all features from a prior version are included in the subsequent version, unless removed or replaced in accordance with applicable terms.

## 9.2 Supported Connectors and Add-ons

See [Add-on platform compatibility](#) on Optimizely World for supported Add-ons.

## 9.3 Supported Products and Services

The Service framework can be extended with compatible .Net based server-side libraries and components. Typical integrations go through the APIs, such as the [Optimizely Service API](#) or Web Services, over the internet using SSL. All third-party software or services not identified in the [Optimizely DXP Requirements](#) topic on Optimizely World must follow the previously described integration or be approved by Optimizely to be on-boarded to Digital Experience Platform.

See the [DXP Environments](#) topic on Optimizely World for additional information on environments and working with them.

## 9.4 VPN

VPN must support IKE version 2.0 on Customer side. Dynamic routing is required.

## 9.5 Application Monitoring

The service includes application monitoring, which in some cases requires customer specific configuration to effectively monitor the service usage. A Customer is required to follow guidelines from Optimizely service engineers, to ensure effective and accurate monitoring for the SLA to be applicable.

## 9.6 Rollbacks

According to Industry practices, if a defect is found during a deployment of a new release, a roll-back to previous version shall be applied. Customer or Designee is to identify that such defect has occurred and correct the found defect. After defect has been found and corrected, a new deployment can be scheduled per Service Request.

Fundamental features of a CMS or Commerce Connect Subscription may vary depending on the chosen Subscription type and Tier.

## 9.7 CMS Capabilities

Optimizely will provide the services to the Customer which will enable the Customer to manage content and marketing campaigns all in one screen. See [Capabilities included in CMS Subscription](#).

## 9.8 Commerce Connect Capabilities

Optimizely will provide services to the Customer that will let customer take control of the customer experience with a commerce platform that has built-in content and Content Cloud.

Commerce Connect includes all CMS capabilities. See [Capabilities included in the Commerce Connect Subscription](#).

## 9.9 Search & Navigation

Optimizely Search & Navigation (prev. Find) is part of the service, with one (1) index available per Application Environment. A set number of languages and text analysis on those languages is included in each Service Instance for the search.

Customers can choose from a list of [Supported Languages](#).

If additional text analysis is required for languages beyond the set number included in the Service Instance they can be added for an additional cost. See the [Supported Languages](#) section on Optimizely World for additional details.

Additional indexes for local development environments can also be added for an additional cost.

Indexed content should be directly related to and relevant for serving pages to visitors. All Indexed content should be owned by or licensed to Customer. Amount of indexed content should be reasonably in proportion to number of pages served. Customer must avoid storing Personally Identifiable Information (PII) data of Data Subjects in search indexes. If PII data is stored in an index, Customers have responsibility to inform Optimizely so that Optimizely can take reasonable measures to protect the data. Additional charges will apply for any measures taken.

## 9.10 Content Delivery Network (CDN)

The service includes infrastructure for caching assets such as images and video at the edge of the network closest to visitors to optimize content delivery globally. Some logic is performed at the edge for performance, optimization and security which are described at Optimizely [World](#) under the [CDN topic](#).

All traffic to the services goes through the Content Delivery Network (CDN) and the CDN acts as an origin shield to the parts of the service hosted in Azure.

See Optional Services section for information on CDN China.

## 9.11 Transport Layer Security (TLS/SSL)

TLS/SSL is commonly used for encrypted integration and communication with other services over HTTP (HTTPS).

All domains in the service are protected by TLS/SSL by default, and TLS 1.2 or above can be enforced for customers requesting it. Learn more in the [TLS/SSL topic on Optimizely World](#).

### 9.11.1 Digital Certificates

Digital certificates can either be provided by the Customer or obtained through Optimizely Managed Services. Optimizely typically provides all non-production Digital Certificates. Hosting of additional customer provided Digital Certificates may incur additional costs depending on the configuration.

### 9.12 Redirect to Secure URLs

The service follows industry standard best practices and will provide customers the ability to redirect from a non-secure www URL and/or non-secure root domain to a secure www URL (e.g. <http://www.customer.com> or <http://customer.com> redirect to <https://www.customer.com>). Customers who wish to redirect from a secure root domain to a secure www URL (e.g. <https://customer.com> redirect to <https://www.customer.com>) can consider alternate solution approaches. Learn more in the [TLS/SSL topic on Optimizely World](#).

### 9.13 Virtual Private Network

VPN may be used to allow a secure connection to internal corporate resource(s), for example. Communication is one-way to the on-premises system. One (1) VPN connection is included with all Application Environments. See VPN requirements.

### 9.14 Web Application Firewall (WAF)

The service uses WAF to mitigate attacks at the network edge, protecting the Customer's website from common web threats and specialized attacks before they reach the CI servers.

Automatic protection from diverse threats, with default rule sets and automatic rule updates providing Layer 7 protection that is fully integrated with DDoS mitigation:

- Minimal processing times with instant global updates
- No hardware, software, or tuning required

See the Web Application Firewall topic in the [Security](#) section on Optimizely World for additional information.

### 9.15 Transactional Email

Transactional emails are typically mails triggered automatically from a user's interactions with the website such as form submissions, email confirmation, order confirmation, shipping notifications, abandoned cart, etc.

A Subscription support a set number of transactional emails per month. Additional emails can be added for an additional cost.

## 9.16 Transparent encryption of data at rest

Marketing and commerce data stored in Service Instance(s) is encrypted at the storage level with AES 256 to protect against the threat of malicious activity by performing real-time encryption and decryption of the data, backups, and log files.

The encryption key is protected by a built-in certificate, which is not accessible to Customer, or Optimizely service engineers.

## 9.17 Automatic Image Optimization

To speed up page load times, images delivered from the service are automatically optimized to reduce the file size with no noticeable reduction in image quality, and without changing image dimensions. How it works in detail is described at Optimizely World under the [CDN topic](#).

## 9.18 Content Graph

Content Graph exists as a Digital Experience Platform service. You can provision it from within the PaaS portal. Once activated, you can begin by [installing](#) and deploying the required CMS package for your site. With the sync package installed, you can manage the synchronization of content into the Content Graph service by configuring [triggers](#) and [scheduling options](#) that determine when the package will sync content between your site and the Content Graph service.

You can then begin using the access key you received at onboarding to query the GraphQL service and begin building Content Graph-based solutions.

There are countless applications for Content Graph. Most of these falls into two categories: content search and content delivery.

Content search is a primary use case for Content Graph. Developers can create custom search tools that transform user input into a GraphQL query and then process the results into a search results page. Unlike the existing CMS search tool, Search and Nav, developers can extend the logic behind these queries in countless ways to enable highly customizable search experiences. Additionally, Content Graph's search is much more efficient than Optimizely's [Elasticsearch](#)-based Search & Navigation.

Search is not the only use case for Content Graph. Because it can expose all the content in a CMS site as a query-able graph, developers can build dynamic content blocks by querying data and shaping as needed. For example, a developer could create a "Related articles" content block that queries the five most recent articles with the same tag or content type and displays titles, links, and an associated image asset in a block.

Headless content delivery is another use case for Content Graph. Because GraphQL calls return CMS data as a JSON object, Content Graph can enable cross-application and cross-framework

delivery of content. For example, a mobile app developer could create an app that pulls content from CMS into the app and renders it in a mobile-native format. With this approach, CMS users can create custom mobile apps with the same content as their traditional websites.

Indexed content should be directly related to and relevant for serving pages to visitors. All Indexed content should be owned by or licensed to Customer. Amount of indexed content should be reasonably in proportion to number of pages served. Customer must avoid storing Personal Data (or Personally Identifiable Information (PII) data) of Data Subjects in search indexes. If Personal Data or PII data is stored in an index, Customers are responsible to inform Optimizely so that Optimizely can take reasonable measures to protect the data. Additional charges will apply for any measures taken.

Customers using Search & Navigation may be permitted to trial Content Graph for 30 days by enabling it in the PaaS portal. After the trial period has ended, Content Graph instances and data will be deleted unless Customer subscribes to Content Graph and migrates from Search & Navigation to Content Graph.

Customer may not use both Content Graph or Search & Navigation at the same time for a single environment, except i) for the purpose of migrating between Search & Navigation and Content Graph; ii) where Search & Navigation has been purchased by Customer as a stand-alone Software Service; and iii) for any trial period as set out above.

## 10. Optional Extras

Optional extras are the additional capabilities added to the Subscription, Service Instance or Application Environment, for an additional cost.

Customer may elect to receive the following Optional Extras. In the event the Customer elects to receive any Optional Extras, the parties shall discuss and negotiate relevant terms in good faith.

### 10.1 Additional Service Instance

An Additional Service Instance is a Service Instance the Customer may add to a Subscription, with its own code base and Region, where all usage metrics and quality metrics (SLA) from use of the Additional Service Instance are tallied against the usage and quality metrics, Usage Terms, Overage Terms, and pricing defined within the Subscription.

A Master Package Service (with line items in an order) is to be kept live during the term for the Additional Services. It is possible to request that the Additional Package becomes the Master Package by signing a new contract, then a migration must be performed from current

“Additional Package” to new “Master Package”. If Optimizely is requested to perform migrations, this will come with additional fees.

## 10.2 Additional Application Environment

An Additional Application Environment is an Application Environment, the Customer may add to a Service Instance. The partner can deploy directly to the Additional Application Environment in the same manner as they would to the Integration environment. Deployments to Preproduction and Production are always initiated from the Integration environment. When the partner or Customer is ready to deploy to Preproduction/Production they must first deploy to the Integration environment.

A Master Package Service and corresponding Application Environments (with line items in an order) is to be kept live during the term for the Additional Services. It is possible to request that the Additional Package becomes the Master Package by signing a new contract, the migration must be performed from current “Additional Package” to new “Master Package”.

## 10.3 Automatic Failover

Adds the capability for a Service Instance that serves production traffic out of one datacenter, to automatically failover the production Application Environment to a replicated Application Environment in another datacenter in case of a disruption of service. The replicated Application Environment contains the read-only capabilities and components of the source Application Environment, and is continuously updated in terms of content, transactions, and code, to ensure it can provide up-to-the-minute continuity.

*Automatic Failover can be added for an additional cost and is only available in specific regions, see Regional Datacenters in section 6.*

### 10.3.1 Read-only replica

The replicated Application Environment serving as a fallback, will run in read-only mode, meaning the Service Instance will not be able to process changes (except logging site activity) until normal operations have been restored, either by the recovery of the source Application Environment, or promotion of the replicated Application Environment.

## 10.4 Zone Redundancy

The availability zone resiliency paid add-on is a high-availability offering that mitigates risk to your application from data center failures. Availability zones are unique physical locations within a cloud region. Each availability zone is made up of one or more data centers equipped with independent power, cooling, and networking. To ensure resiliency, there’s a minimum of three separate availability zones in all enabled regions. This means that in case of data center

outages, the customer's application is provisioned in additional data centers to mitigate the risk of single data center outage.

## **10.5 Web Vulnerability Scanning (WVS)**

WVS includes active and passive web vulnerability security tests, which adds another layer of protection against a wide variety of flaws, including SQL, LDAP, XPATH and NoSQL injections, Cross Site Scripting flaws, broken session management, remote code and command execution, malware, etc.

A report will be provided to the Customer on their usage.

WVS is available at an additional cost. Pricing is based per target, where the target is defined by the Customer. A target can be an entire domain or a smaller subset such as a page. Unlimited tests can be run on a defined target.

Third party consulting on any issues identified is available at an additional cost.

## **10.6 Content Delivery Network - China (CDN China)**

Customers with a presence in China may wish to extend their CDN capabilities with this additional offer to ensure visitors within China have the best experience. Since China's internet infrastructure differs from the rest of the world this requires special arrangements and agreements to be put in place. The Customer must obtain their own ICP # and provide to Optimizely to enable China CDN. Optimizely cannot provide support for customer acquisition of an ICP#.

China CDN can be added for an additional cost.

## **10.7 Change Management 24/7**

Subscriptions with a lower response time, can add 24/7 support at an additional cost.

## **10.8 Additional Availability Level**

Subscriptions with a lower guaranteed Availability can be increased up to 99.90% at an additional cost.

## **10.9 Optimizely Community API**

Optimizely Social is a cloud-based platform of extensible services for modeling and managing community-generated content. Comments and ratings combine to help deliver user reviews, which can be associated with resources such as content and products. Groups and activity streams further enhance the experience of building and managing meaningful social communities. Moderation services help manage feedback as well as automate actions for follow-up, review, or compliance needs.

Optimizely Community API can be added for an additional cost.

See the [Optimizely Community API Service Description](#) for more information.

## 10.10 Optimizely Data Platform (ODP) and CDP Audience Syncs

Optimizely Data Platform (ODP) and CDP Audience Sync, an ODP product (both subject to payment of subscription fees), are available to integrate with CMS. Details about usage, scope, and functionality can be found in the [Optimizely Data Platform Service Description](#), with details about CDP Audience Sync in Section 1.8, and additional data compliance considerations in Section 9.

# 11. Consulting and Training

## 11.1 Expert Services

Optimizely's Expert Services team help ensure that customers and partners are successful in implementing Optimizely's products. Expert Services is a global team of consultants who can be contracted to provide best practices guidance or hands-on support to assist the project team in deploying successful projects with the Digital Experience Platform.

Contact Optimizely Expert Services by email at [expert.services@optimizely.com](mailto:expert.services@optimizely.com) or [online](#).

## 11.2 Onboarding

Onboarding is a pre-paid pre-defined scope-limited professional service that Optimizely provides Customer as part of the Software Service if Subscribed. It provides for a technical overview for configuration, implementation support, and a pre-launch checklist.

Onboarding is purchased as limited number of hours, with a fixed validity period as set out in the applicable Order Form. Onboarding hours can be utilized only for the Software Service that Onboarding was purchased. At the end of that period, unused Onboarding hours expire. Unused hours cannot be rolled over, or re-purposed for any other Software Service. It is the responsibility of the Customer to manage and monitor its Onboarding hours. Optimizely will provide a status of Onboarding hours upon request. Additional Onboarding hours can be purchased at Optimizely's then current fees.

Upon signing up for the CMS or Commerce Connect services an Optimizely Engagement Manager will be assigned and notified. The Optimizely Account Executive Engagement Manager will schedule a Project Kickoff call to begin the Customer onboarding process. The Project Kickoff meeting will provide the Customer with an overview of the service, general service process review (e.g., how to register a ticket), review of project objectives, a project

outline/plan, and contact methods. The Engagement Manager will also ensure that the Customer receives deployment access to the Service Instance(s) included in the Subscription.

During the Project Kickoff, all parties involved in the project will agree on a communication plan to track progress, recommend use of the software, testing methodology and initial go-live plans. This helps the project moving forward as expected and ensures Optimizely is prepared to support the live production system.

### **11.3 Education, training, and online help**

Optimizely offers both business user and developer training at an additional cost. Training may be ordered from an Optimizely sales representative or from the [Optimizely website](#).

Optimizely also offers [online help](#) and has a robust community of active members at [Optimizely World](#).

If the Customer is purchasing an Education Subscription Service: Customer attendees cannot be reassigned during the Subscription Term unless express prior authorization is provided by Optimizely. Customer has six months from the Effective Date to register for that Service (“Registration Period”). For clarification, Education Subscription Services are deemed complete for the then Contract Year if Customer does not register during the applicable Registration Period.

## **12. Support**

Please refer to the [Optimizely Support Policy](#) for more information.

## **13. Service Health and Continuity**

Optimizely provides a [service dashboard](#) where Customer can register to receive incident updates and view information about platform wide planned maintenance.

Optimizely communicates incidents regarding Customer specific applications and websites. Customers are notified by email regarding issues and are continuously updated during the progress of the incident.

More details can be found in the [Optimizely Service Continuity Policy](#).

Data retention is defined in our [Data Retention Policy](#).

## 13.1 Service Level Indicators

Optimizely monitors key areas of the service to ensure availability and react to incidents.

SLI	SLO	Description
<b>HTTP end-point uptime</b>	According to SLA	We connect to the endpoint to download the response. Consecutive failures to this check triggers Incident Management procedures.

### 13.1.1 Real User monitoring

Digital Experience Platform may monitor end-user experience by inserting a JavaScript on each page that measures end-user performance.

### 13.1.2 Application monitoring

Digital Experience Platform may monitor application resource consumption to ensure acceptable use of the service and improve the platform.

## 13.2 Data Backup and Restore

Customer can order a restore of the Customer's service to a previous state, or create a new instance based on one of the Customer's backups.

The Customer deployed code and configuration is backed up every twenty-four (24) hours. In addition, a full snapshot of all content and transactions is automatically backed up at least every week, with incremental changes backed up hourly, and transaction logs backed up continuously.

The backups are replicated to the paired data center, to ensure availability of the backups in the event of disaster. The Recovery Point Objective (RPO) is up to one (1) hour.

Files uploaded are not backed up as a part of this process. The storage service is used to store binary large objects ("BLOB Storage"). The underlying Blob Storage is disaster resilient as it is replicated both within the primary data center and to a geo-redundant location.

**File Deletion** – Due to the nature of the Content and Commerce Connect Software Service(s), if a file is deleted from the primary Blob Storage (whether intentionally or unintentionally), the file will be deleted in near real time from the replicated locations also.

**Deleted File Restoration** – The only way to restore a deleted file is to restore it from the Content Management System's (CMS) internal recycle bin if the CMS has been correctly configured by Customer or Customer's Authorized Designee.

### 13.3 Service Window and Patching

The Digital Experience Platform Service uses Azure technology to run Optimizely applications and thus aligns with Microsoft patch release cycle. The Service does not use the traditional version of Microsoft Windows, but rather a purpose-built version with a smaller attack surface. The service relies on Microsoft's standard approach for [Azure antimalware](#) to provide real time protection and content scanning.

Microsoft is responsible for patch management. Learn more about [Microsoft's Guest OS patch management schedule](#) and the [support lifecycle](#) on their website. Optimizely works closely with Microsoft for any edge cases involving patching.

### 13.4 Service Level Agreement

See [Optimizely Service Level Agreement \(SLA\)](#).

### 13.5 Reporting

#### 13.5.1 General Report

As part of the Service being provided to Customer, Optimizely shall report on Subscription usage and quality, commencing from the Launch of the service. The following shall be reported as a minimum:

- The measured Quality Metrics of Service Instance(s) under the Customer's Subscription.
- The measured Consumption metrics of Service Instance(s) under the Customer's Subscription.
- Incident(s) and Problem(s) of Service Instance(s) under the Customer's subscription.
- Service Requests of Service Instance(s) under the Customer's subscription.

#### 13.5.2 Challenging Report

Should the Customer dispute any portion of the reported data, they shall have ten (10) Business Days to give written notice of the dispute to Optimizely. Customer must have documented evidence contrary to any Optimizely-generated report to raise a dispute. Parties agree to resolve any dispute in good faith, and not unreasonably withhold agreement to a compromised resolution.

### 13.6 Roles and Responsibilities

See the [Roles and Responsibilities Matrix](#) for more information.

## 14. Compliance

For information about compliance see the [Optimizely Trust Center](#). The services follow Microsoft Azure compliance standards, and therefore our infrastructure has a wide range of compliance certifications, standards, and supporting processes.

## 14.1 Data Privacy

Optimizely allows you to process and/or store PII data but not sensitive personal information (as defined by [EU GDPR](#)) in the CMS and the Commerce Connect Services.

Processing and/or storing PII data is not allowed in the Search & Navigation product in the Service.

Customers who require additional controls relating to protecting provided PII data can opt for the Geofencing optional configuration. If PII data is stored and/or processed, Optimizely can provide a geo-fenced option to help provide compliance with Schrems ii legislation. This option changes certain aspects of the Service Level Agreement (SLA) around support hours and response times. Please contact your salesperson or Customer Success Manager if this is of interest.

## 15. Ordering and Validity

### 15.1 Ordering of the Service

When a customer places an order with an Optimizely sales representative, Optimizely provisions the systems. Contact your Optimizely sales representative or the [local office](#) to order.

#### 15.1.1 Variable price parameters

Usage Metrics and Limits are described in the [Product Supplement](#)

#### 15.1.2 Provisioning time

If all necessary data to provision this Software Service(s) has been included in the Order, Optimizely has a target of provisioning the Customer's Software Service(s) within five (5) business days after the Order has passed all checkpoints within the Order Management System and reached Optimizely Managed Services.

#### 15.1.3 Validity and duration of the Service Description

This Service Description shall remain valid as a description of Software Service(s) a Customer may purchase and/or receive from Optimizely through the term of any related agreement

between the parties, and may be subject to further updates, under the notice provisions of such agreements. Under such notice provision, Optimizely reserves the right to update or replace it as necessary at any time. Changes made to the Service Description or any new Service Description (for example, a replacement of the previous one) shall always enter into force from the date of their publication on the page, or from such notice provision in the agreement, which may apply. <http://world.optimizely.com/services/descriptions/optimizely-cms-and-customized-commerce-service-description/>.

## 16. Programs for Beta and Limited Availability

Optimizely will release Services and features of these services in various stages before they are Generally Available and fully supported.

### 16.1 Beta and Limited Availability

Optimizely may offer “alpha,” “beta,” or other early-stage Software Service, integrations, or features (“Beta Programs”), which are optional for Customer to use. We provide customers who participate in our Beta Programs the opportunity to test, validate, and provide feedback on future functionality. Feedback gathered during this phase helps us to determine which features and functionality provide the most value to our customers and helps us focus our efforts accordingly.

Optimizely may also offer Customers access to a limited-availability version of the Software Service, including certain proposed new features, functionalities, or capabilities (“Limited Releases”). Limited Releases are pre-production releases, intended for later general Customer access and use, but pending fine tuning, testing and other feedback.

Access to and use of Beta Releases and Limited Releases is optional. Optimizely makes no promises that future versions of Beta Releases and Limited Releases will be released or will be made available under the same or similar commercial, or other, terms.

Beta Releases and Limited Releases may not be complete or fully functional and may contain bugs, errors, omissions, and other problems for which Optimizely will not be responsible. As such, use of Beta Releases and Limited Releases is done on Customer's own risk.

Optimizely may terminate Customer’s right to use any Beta Releases and Limited Releases at any time at Optimizely’s sole discretion, without liability.

The guidelines and requirements for Beta Releases and Limited Releases are described on Optimizely World.

### **16.1.1 Optimizely SLA**

Beta Releases and Limited Releases are excluded from any Optimizely SLA. Any unavailability related to such use is excluded from any SLA Availability calculation.

### **16.1.2 Warranties and Indemnities**

Optimizely's warranties and indemnities under the End User License Agreement do not apply to Beta Releases and Limited Releases.

### **16.1.3 Support**

Optimizely may use good faith efforts in its discretion to assist Customer with Free Beta Releases and Limited Releases but has no contractual obligation to provide that support for Beta Releases and Limited Releases.

# 17. Appendix 1 - Changelog Summary

In this appendix you will find a summary of the changes that were communicated at times defined below. However, since clarifications may have been made in addition to the changes made in this appendix, it is still important that you read through the relevant Service Description(s).

## **Changes for distribution Jun 12, 2023**

Section 9.18

Updates to Content Graph service definition.

## **Changes for distribution Mar 13, 2023**

Section 9.18

Added Content Graph as a Search and Content delivery service.

## **Changes for distribution Sep 23, 2022**

Section 6

Added Sweden Central as new cloud Region (6).

Specified in which regions Automatic Failover is available (6).

Section 9

Updated Search & Navigation (9.9) with capacity constraints.