

Optimizely Configured Commerce Service Description

Updated: August 22, 2023

1. Overview

Optimizely Configured Commerce includes a headless commerce engine, a front-end visual editor/CMS, catalog search engine, and sundry commerce capabilities. The service is delivered via single-tenant cloud instances with multi-tenant services supporting. It is hosted in any region Optimizely is operating.

The platform capabilities include Catalog Management, Cart & Checkout, Catalog Search, Self-Service/My Account, Promotions, Personalization, Pricing & Inventory, etc.

1.1 Configured Commerce Pricing

Configured Commerce is priced based on the level of transactions the customers conducts on the platform. (e.g. web orders, mobile app orders, PunchOut orders, etc.) Additional add-ons are available for separate fees (resources tiers, premium support, etc.)

2. Features

Configured Commerce provides the tools and capabilities to build, host, and run commerce websites. Features include:

- Cart/Check Out
- Order Management
- Catalog Manager
- User Management
- Promotions
- Search
- Payment
- Pricing
- Segmentation
- VMI

- DAM

3. Infrastructure and Architecture

3.1 Infrastructure

The infrastructure layer for this product is based on third party providers.

Cloudflare™ CDN

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

Microsoft Azure™

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

Amazon AWS™

<https://aws.amazon.com/agreement/>

3.2 Regional Data Centers

When ordering this service, customers can choose from one of the following locations (in bold):

GEOGRAPHY	REGION
Asia-Pacific	Southeast Asia (Singapore)
Asia-Pacific	Australia East (New South Wales)
Asia-Pacific	Australia Southeast (Victoria)
Europe	North Europe (Ireland)
Europe	UK South (London)
Europe	West Europe (Netherlands)
Europe	Norway East (Oslo)
Europe	Sweden Central (Gävle)
North America	Canada Central (Toronto)

North America	Canada East (Quebec City)
North America	Central US (Iowa)
North America	East US (Virginia)
North America	West US (California)
Middle East	United Arab Emirates North (Dubai)

3.3 Architecture

More detailed information that describes the architecture of the product, along with an introduction to the system foundation and related components and products, is available in the [Documentation Guides](#).

All Subscriptions include one production instance and one sandbox instance by default. Additional instances can be purchased.

Sandbox Instance - instance that can be used for development and/or UAT.

Production Instance – instance to deploy to the web and for end users use.

See the [Documentation Guides](#) for information about developing, deploying, and working with the Product.

3.4 Optional Extras

Optional extras are the additional capabilities added to the service at an additional cost. Optional extras must be added to customers’ contracts.

3.4.1 Configured Commerce Mobile APP SDK

A mobile application that makes use of the Configured Commerce headless engine is available for purchase by customers. It is delivered to customers as an SDK – a repo of code that represents a fully functional mobile application that customers can then modify and deploy into app stores. Currently, the mobile app SDK is available for iOS and Android. It is written in Xamarin.

3.4.2 B2B Commerce Analytics

A separate application that captures usage data from customers’ commerce sites and visualizes it in a series of pre-designed dashboards. These dashboards have been developed with a specific focus on B2B customer needs. They provide drill downs and the ability to export the

data. They are filterable but are not customizable. B2B Commerce Analytics is built on top of Looker.

3.4.3 PIM

A separate application for product information management. The PIM allows customers to import data from numerous sources, normalize/clean, enrich, and manage that data. The product information in the PIM is then provided to the catalog in Configured Commerce for use on customers' commerce sites. PIM also provides workflow management for small teams collaborating on the product information.

4. Ordering and Validity

4.1 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.

4.2 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 24 hours during business days after the Order has passed all checkpoints within the Order Management System and reached Optimizely Managed Services.

4.3 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://www.optimizely.com/services/descriptions/optimizely-configured-commerce-service-description>

5. Consumption Metrics

Configured Commerce is priced based on the expected maximum annual transactions for a customer.

5.1 Definition of “Transaction”

Transactions are counted as: each cart record that currently has or has had a status that is considered transacted. Below is a table of all standard statuses provided in the product.

Statuses considered transacted are labelled yes. Statuses not considered transacted are labelled no.

Further explanation:

- If a cart record only ever carries a non-transacted status, it will not be considered transacted.
- If a cart record has or has had a transacted status and is later changed to a not transacted status, that record will still count as a transaction.
- If a cart record only ever carries a transacted status, it will be considered transacted.

No matter how many status-changes a record goes through, it will never count as more than one singular transaction. For example, if a cart record were created in “Cart” status, changed to “QuoteCreated”, changed to “QuoteRejected”, changed to “QuoteProposed”, and finally changed to “Complete”, the cart record would count as one singular transaction.

Customers are empowered to create their own custom statuses for cart records. All statuses created by a customer, therefore not one of the standard statuses, will be considered a transacted status and thus count as one transaction.

<u>Standard Cart Record Status</u>	<u>Transacted</u>
CancellationRequested	Yes
Complete	Yes
JobAccepted	Yes
Processing	Yes
QuoteCreated	Yes

QuoteProposed	Yes
QuoteRejected	Yes
QuoteRequested	Yes
PunchOut	Yes
PunchOutOrderRequest	Yes
ReadyForPickup	Yes
Review	Yes
Submitted	Yes
AbandonedCart	No
AwaitingApproval	No
Cart	No
ConfigurationInProgress	No
Requisition	No
RequisitionSubmitted	No
Saved	No
Void	No

6. Programs for services and features in Beta and Limited Availability

6.1 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.

6.1.1 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.

6.1.2 Warranties and Indemnities

Optimizely’s warranties and indemnities under any applicable agreement between Optimizely and Customer do not apply to Beta Releases and Limited Releases.

6.1.3 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.

7. Services and Training

7.1 Expert Services

Optimizely's Expert Services team can be contracted to help ensure that customers and partners are successful in implementing Configured Commerce. 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.

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

7.2 Onboarding

Upon completion of an order, an Optimizely onboarding team member will be assigned and notified. The on-boarding process is started in a project kickoff. During this meeting, the Optimizely project manager will provide the Customer with an overview of the service and on-boarding process and to gather client requirements for the use and configuration of the service.

The Optimizely project manager will also ensure that the Customer receives access to Software Services included in the Subscription and provide advice on recommended integration approach and relevant documentation.

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.

7.3 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](#).

8. Support

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

9. Service Health and Continuity

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

Optimizely communicate 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](#).

9.1 Service Level Indicators

Optimizely monitors key areas of the service to ensure availability and react to incidents in accordance with the SLA.

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

9.2 Service Window and Patching

9.2.1 Service Maintenance

Optimizely performs service maintenance and upgrades during a Routine Maintenance Window between the hours of 8am and 8pm EST, unless deferral of such maintenance or upgrades to the would materially and adversely affect performance or security of Company's network or data center.

Optimizely endeavors to perform such maintenance or upgrades in such a manner to not adversely impact Customers. Notwithstanding the foregoing, planned downtime may occur when Customer has no access to the software due to scheduled maintenance and application upgrades (“Planned Downtime”). To the extent possible, Company shall notify Customer as far in advance as practicable of any maintenance or upgrades outside of the Routine Maintenance Window.

9.2.2 Service Level Agreement

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

9.2.3 Roles and Responsibilities

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

10. Compliance

See the [Optimizely Trust Center](#) for more information.

10.1 Privacy, Security, and Transparency

See the [Optimizely Trust Center](#) for more information.

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).

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